

Oracle Fusion Service

Case Management: Questions and Answers

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1 Questions and Answers

What are security roles for Case Management?

Many job roles and duty roles are predefined. The following table lists the main predefined job roles specific to Case Management.

For a more complete list of job roles, see the Security Reference for Fusion Sales and Service guides on Help Center.

Job Role	Description
Case Manager	A case manager is a senior case worker with supervisory responsibilities. The case manager is responsible for identifying the best approach to difficult cases that require approvals or significant discretion. For example, where there have been overpayments to a benefit recipient that need to be covered, or where there are unusual case circumstances. The case manager is also responsible for coordinating care and benefits with external providers, such as foster care.
Case Worker	A case worker is responsible for day-to-day help for an individual, family, or group. Cases (which might be applications for benefits, reports of welfare issues or abuse, or other matters to investigate) are allocated to case workers, who are responsible for assessing the requirements of each case, identifying government programs or other resources (for example, community groups) which can help, and following up to track progress and suggest other plans if required. Some government programs require case workers to work in the field. For example, finding people who require help such as the homeless, visiting less mobile members of the community such as elderly, and assessing benefit applicants and recipients living environments.

In addition to the job roles, the following table lists the duty roles specific to the Service offering.

Duty Role	Description
Case Execution	Helps clients who are applying for benefits, opens cases and manages all tasks related to the case, processes clients applications, evaluate clients needs for benefits, counsels benefits recipients, performs assessments of clients strengths and needs to develop benefit plans, performs follow-up with clients to ensure they're working on their tasks.
Case Supervision	Supervises and manages caseworkers, helps caseworkers with any complex issues, handles case approvals and escalations, coordinates care and benefits with external service providers, assigns, or reassigns cases to caseworkers, conducts evaluations of benefits programs and provides feedback.

Resource Roles and Provisioning Rules for Service

Oracle provides resource roles for the Service offering which are used to provision the standard service job roles. Oracle also provides the role provisioning rules for these resource roles so that service users are automatically assigned the job and abstract roles they need.

These are the service role provisioning rules provided by Oracle, the condition that triggers the provisioning, and the job and abstract roles each rule provisions.

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned
Service Vice President	HR Assignment is Active	Customer Service Manager
	Resource Role is Service Vice President	Resource
Service Administrator	HR Assignment is Active	Customer Relationship Management Application Administrator
	Resource Role is Service Administrator	Resource
Service Manager	HR Assignment is Active	Customer Service Manager
	Resource Role is Service Manager	Resource
Service Representative	HR Assignment is Active	Customer Service Representative
	Resource Role is Service Representative	Resource

Note: If you didn't use the Create Company Information quick setup task to set up your company information, then the predefined role provisioning rules aren't created; you must create the provisioning rules yourself. For information about creating provisioning rules, see the topic [Create Rules to Automatically Provision Job Roles to Sales Users](#).

What are the lookup types for Case Management?

Lookup types provide the lists of values in application fields that are drop-down lists. Lookup types for Case Management can be changed during or after your implementation.

For example, while creating a case, personnel can select the priority of the case from the Priority drop-down list. The values in that list are derived from the lookup type, ORA_SVC_SR_PRIORITY_CD. This lookup type has several potential values known as lookups, each with their own unique lookup code and meaning that displays in the UI.

Note: You can't create a new lookup with the name starting with ORA, to avoid any conflict with the lookups predefined in the application.

How You Modify Lookup Types

You can change many lookup types during or after implementation.

The configuration level of a lookup type determines whether the lookups in that lookup type can be edited. The lookup configuration levels are: User, Extensible, and System.

Here's a table that shows which lookup management tasks are allowed at each modification level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No

Allowed Task	User	Extensible	System
Inserting new codes	Yes	Yes	No
Changing the wording that displays on the page (Meaning field)	Yes	Yes	Yes
Updating start date, end date, and enabled fields	Yes	Yes, only if the code isn't predefined data	No
Deleting codes	Yes	Yes, only if the code isn't predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

If a product depends on a lookup type, the configuration level must be set to system or extensible to prevent deletion. Once the configuration level is set for a lookup type, it can't be changed. The configuration level for lookup types created using the Define Lookups page is by default set at the User level.

Case Management Lookup Types

You can find lookup types by searching for an associated setup task in the Setup and Maintenance work area. Lookup types that are commonly edited are presented within the Case Management offering as one of the setup tasks or task lists. Other lookup types that are less frequently changed, might not be shown in the offering, but can still be accessed through the Manage Standard Lookups task. Here are some common help desk lookup tasks or task lists:

Case Lookup Types and Descriptions

Lookup Type Code	Description
ORA_SVC_CASE_CONTACT_REL_CD	Case Contact Relationship Code
ORA_SVC_CASE_MSG_STATUS_CD	Status of message.
ORA_SVC_CASE_MSG_TYPE_CD	Type of message associated with a case.
ORA_SVC_CASE_MSG_VISIBILITY_CD	Can be used to decide if message should be visible to internal or external users.
ORA_SVC_CASE_PRIORITY_CD	Priority of the case.
ORA_SVC_CASE_SENSITIVITY_CD	Sensitivity of the case.
ORA_SVC_CASE_SOURCE_CD	Sources of origin for case.
ORA_SVC_CASE_STATUS_CD	Status of a case
ORA_SVC_CASE_STATUS_TYPE_CD	Status type such as Active or Closed.
ORA_SVC_CASE_TYPE_CD	Type of the Case.

Lookup Type Code	Description
ORA_SVC_CASE_SEARCH_REC_SET_CD	Case search record set type.

How do I set up inbound and outbound email?

You can configure email to use a single email channel to handle both inbound and outbound email messages. Inbound messages are the messages that you receive from your customers. Outbound messages are the messages that you send to your customers.

Note: When your customers receive an email from your company, they can reply directly to the email. They don't have to change the **To** address in the reply. The To address already displays the account name field of the channel that the agent uses in the outbound message.

Use the following tasks in Setup and Maintenance to set up inbound and outbound email.

No.	Task	Describes how to
1.	Enable Configuration of Email Communications	Enable the tasks required to configure inbound and outbound email communications for service requests.
2.	Configure an Email Channel	Configure an email channel for your organization.
3.	(Optional) Create and Update Inbound Message Filters	Set up email filters. Filters enable you to set one or more criteria based on which an incoming message from a customer or a partner can be accepted or rejected.
4.	Configure Profile Options for Inbound and Outbound Email	Configure inbound and outbound email profile options.
5.	(Optional) Define Email Templates	Define email templates.
6.	(Optional) Modify Acknowledgment Messages for Inbound Email	Modify the predefined acknowledgment messages provided by the application according to your company's requirement.
7.	Access Point Setup for Inbound Emails: This section consists of multiple topics.	The procedures in this section describe how to verify your email channel configurations and how to register the correct access points with the UMS.

No.	Task	Describes how to
8.	Configure a Job to Process Inbound Emails	Configure a job to process inbound emails to retrieve emails from the customer at regular intervals.

How do I configure an email channel?

To send emails to your customers and to receive emails from them, you must first set up an email channel.

You can create separate email channels for different application stripe codes. For example, one for CRM and one for HCM. However, you can use the same email channel for both inbound and outbound emails:

Note: You can add attachments totaling 10MB to an email.

- **Inbound email:** Indicates the service emails received from your customers. As part of your implementation, you must set up a forwarding rule on your company email server to redirect these emails to Oracle's inbound email ID. This is the same email account that Oracle provided at the time of provisioning. For example, all the support emails that are sent to `TechSupport@mycompanydomain.com` are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing. The `SVC_INBOUND_EMAIL_ADDRESSES` profile option indicates the Oracle email ID to which the support mails must be forwarded.

If it's required for your company, you can also create different support email channels for different business units or divisions. For example, `TechSupportDiv1@mycompanydomain.com`, `TechSupportDiv2@mycompanydomain.com`, and so on. All the support emails sent to these different support email channels are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing.

Note: If you're implementing HR Help Desk or Internal Help Desk, then you must define a channel with the appropriate application stripe. The account name of the channel must match the email address of your mailbox from which you're redirecting or forwarding emails to the Oracle mailbox mentioned above. If you don't define the appropriate channel, the requests created for the emails are set with the CRM application stripe. In such cases, you must run an ODI import process to update the application stripes of the SRs.

The `SVC_INBOUND_EMAIL_ADDRESSES` profile option contains two email IDs:

- For CRM, use the email ID that contains the text 'extservice' as a part of the ID, as the forwarding email ID.

Note: You must avoid updating these inbound email addresses. If you need to update these inbound email addresses for some reason, you must complete the following steps:

- Update the corresponding forwarding rule.
- Ensure that you register the updated inbound email addresses as access points for inbound email. See [How do I register or unregister access points for inbound email?](#)

- **Outbound email:** Indicates the emails that are sent by the Service application from the request. For example, when an agent responds to the primary customer contact.

To ensure that your outbound email is delivered successfully to your external recipients, you must set up a Sender Policy Framework (SPF) policy on your domain.

To enable Oracle to send out an email on your behalf, you must do the following:

- Set up an SPF policy on your domain as an authentication mechanism. The exact method of setting up an SPF policy varies from one domain provider to another. For example, `v=spf1 include:spf_c.oraclecloud.com ~all`.
- To set the support agent's name as the **From Name** in outbound emails, set the value for the **SVC_USE_RESOURCE_NAME_IN_OUTBOUND** profile option to **Yes**. For more information, see [*How do I set the From Name in outbound emails?*](#)

To configure an email channel for the customer:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Communication Channels
 - Task: Manage Communication Channels
2. In the **Service Channels** page, click **Create Channel**.

3. In the **Create Channel** window:

a. Select a **Stripe Code**.

Select **CRM** to process emails from and to external customers. Select **HCM** to process emails from and to internal employees, through the HCM Help desk support.

b. The **Purpose** field is set to **Support** by default.

c. Select the **Channel Type** as **Email**.

d. Specify the support email ID of your company as the **Account Name**. For example:

`support@mycompanydomain.com`

If a forwarding rule is configured, all the mails that are sent to the specified support email ID are forwarded to Oracle's inbound email ID. If an outbound email is configured, Oracle can send mails to the customer as the specified support email ID, on your behalf.

e. Verify whether the generated **Channel Code** is unique.

The channel code is autogenerated and it uniquely identifies a communication channel when exporting or importing channels from one environment to another.

- If the auto-generated channel code is unique, you can leave it unchanged.
- If the auto-generated channel code isn't unique, add a set of characters to the code to make it unique.

f. (Optional) Specify a **Display Name** to indicate any information about the channel, such as the name of the deploying company for which the channel is being configured.

g. When a new channel is being created, it's active by default. To deactivate it, clear the **Active** option.

h. (Optional) From the **Business Unit** drop-down list, select a Business Unit (BU).

The BU set in the scope is selected by default, but you can select a different BU. This column appears only if the multiple business units feature is turned on.

i. Click **Save**.

How do I set queue assignment rules?

You can create assignment rules by using rule sets, rules, conditions, and actions.

The assignment engine uses your rules to evaluate and recommend candidate assignments for specified work objects. For example, you can assign all Cases with a certain case type to one queue, or you can assign a Case to a critical queue if the priority of the Case is high.

Note: A particular work item can be assigned only to a single queue. So it's good to be careful while defining rules. You can't define different rules that assign the same work item to different queues.

To create a service assignment rule:

1. In the Setup and Maintenance work area, go to the following:

- o Offering: Service
- o Functional Area: Communication Channels
- o Task: Manage Service Assignment Rules

2. On the Manage Service Assignment Rules page, select from the **Category** drop-down list:
 - o **Case Queuing Rules**
3. Do one of the following:
 - o Create a rule set by clicking the **Plus** icon and specifying the required values.
 - o Select an existing rule set.
4. Create a rule within the rule set by completing the following steps:
 - a. Click the **Plus** icon in the **Rule set: Rules** region.
 - b. On the Create Rule page, specify a rule name.
 - c. (Optional) Specify a description, an effective start date, and an end date for the rule.
If you don't select an effective start date and end date, the rule comes into immediate effect and lasts indefinitely.
 - d. (Optional) Select the **Inactive** option if you want to enable the rule at a later date.

Note: You can create multiple rules within a rule set.

5. Specify an assignment condition as described later in this topic, in the "Specify a Condition and an Action" section.
This assignment condition is evaluated before a rule-based assignment is made.
6. Select a queue to which a case is assigned if the condition is met.

Specify a Condition and an Action

After specifying the rule details, specify one or more conditions and select a queue to which the Case is assigned, if the condition is satisfied. When the specified condition is satisfied, the Case is assigned to a queue. For example: If the priority of the Case is equal to High, assign the Case to the Critical_Queue.

To specify a condition and an action:

1. Select an option from the **Rule Applies If** drop-down list.
You can choose to perform the action if all of the conditions are met or if one of the conditions is met.
2. Click the **Plus** icon to add a condition.

Note: If you don't add a condition, all your work items are assigned to the queue that you add in step 4.
3. Select the object, an attribute, an operator for the condition, and a value.
For example, **Case** is the object, **Priority** is the attribute of the object, **Equals** is the condition, and **High** is the value. Hence, the condition is **If Case Priority is equal to High**.
4. Add an action to be performed when the condition is satisfied. Click the **Plus** icon to select and add a queue.

CAUTION: Oracle recommends that you always add an action. If you don't add an action, the assignment engine acts unpredictably and you may face issues in the assignment of work items to queues.
5. Search for a queue, select the required queue from the list, and click **Done** to add the queue to the action.
6. Click **Save and Close**.

Related Topics

- [How do I update existing setup data?](#)

What are action plans?

Action plans are used to complete a series of steps or a sequence of events to resolve different types of requests.

You can associate action plans to cases if you need to complete a series of steps or a sequence of events to resolve the case.

You can attach action plans to a many objects, such as cases using an administrator-defined template, or by adding individual actions. Actions can be required or optional tasks, activities, or appointments, or service requests , or other cases.

Be careful about spacing. This is the Case condition. You must remember that each conditioned sentence or phrase won't show in certain output. Here's what I mean.

You can add Action Plans to the following objects:

- Service Requests
- Cases

Agents can add either solo actions, or action plans. Actions can be required or optional tasks, activities, or appointments.

- **Solo Actions** are individual actions added to an object.
- **Action Plans** are added from an administrator-defined template. Action plans are made up of multiple actions.

By using actions and plans, users have:

- A visual aid to see the progress of a solo action or an action plan
- Any warnings on actions or plans

To use the Action Plans feature, set up actions, templates, and categories in Setup and Maintenance.

In Setup and Maintenance, navigate to Service > Action Plan. If Action Plan isn't displayed, use the **Change Feature Opt In** to activate Action Plans.

The following table shows the name and description of each action plan setup task.

Task	Description	Required
Manage Action Plan Profile Options	Manage profile options for the Action Plans feature.	Yes
Manage Action Plan Actions	Create actions that can be used for solo actions or in action templates. You can specify the category, type, duration, and visibility for each action.	Yes
Manage Action Plan Templates	Create templates to group similar actions to be added to an action plan.	Yes

Task	Description	Required
Manage Action Categories for Action Plans	Action categories are used to facilitate finding actions to add to templates or directly to an action plan.	No
Manage Template Categories for Action Plans	Template categories are used by agents to filter and find templates to apply to an action plan.	No
Manage Mapping of Action Plan Status Values	<p>Manage the global setup for status configuration.</p> <p>You can map task, appointment, or request attributes to an action status at a global level. Action status mapping can also be done at the individual action level.</p>	No
Manage Process Integration for Action Plans	<p>Configure the authentication from Fusion Service to your Process Automation instance.</p> <p>Note: Used for the Run Process through Action Plans feature. A subscription to Oracle Process Automation is required in order to take advantage of this feature.</p>	No
Manage Action Plan Process Metadata	<p>Manage the action plan process metadata.</p> <p>Note: Used for the Run Process through Action Plans feature. A subscription to Oracle Process Automation is required in order to take advantage of this feature.</p>	No

Related Topics

- [How do I manage action plan actions?](#)
- [How do I manage Action Plan templates?](#)
- [Map Action Plan Status Values](#)

How do I manage action plan actions?

Use the Manage Action Plan Actions task to create and edit actions for action templates or individual actions used in cases. In this task, you specify the category, type, duration, visibility, and attribute mappings for each action.

To manage action plan actions, in the Setup and Maintenance work area go to the following:

- Offering: Service
- Functional Area: Action Plan
- Task: Manage Action Plan Actions

Create a New Action

Here's how to create a new action:

1. Click **Create Action**.
2. Enter the action name.
3. If you enabled business units for service requests for help desk requests or stripe codes, use the drop-down lists to select the stripe code and BU.
4. Select **Category**.

Select **Class**.

5. Select the **Action Type**.

Depending on the Fusion Service features you're using, Action types can include:

- Appointment
- Article

Note: You can create an Action of type Article. You must select Stripe Code of the action and then select Sub Type of the action. The Attribute Mapping section must be populated as it's required for any other type of actions.

- Case
- Dynamic Process
- HR Help Desk Request (If you're using the Help Desk Offering)
- Internal Service Request (If you're using the Help Desk Offering)
- Opportunity (If you're using the Sales offering)
- Service Request
- Task

Follow the next four steps if you're creating a Dynamic Process Action (with the Run Processes Through Action Plans feature). If you aren't using this feature, you can skip the next four steps.

6. Click the **Edit** icon in the **Process Name** field.

7. Search for and select the process you want to add to the action.

Processes must already be created in Oracle Process Cloud and your connections to Oracle Process Cloud must be working.

Also, the administrator must be added to the Process Application Administrator role in the process workspace UI so they can see all processes.

Note: When you create processes, you must define the following case-sensitive input parameters - `objectNumber`, `objectType`, `actionPlanId`, `actionPlanActionId`, and `processParentObjectType` when configuring dynamic processes. For Solo Actions, input parameter `processParentObjectType` will have value '`ActionPlan`' while for Plan based actions it will have '`ActionPlanAction`'.

8. Click **OK.**

9. Select to use the default version of the process, if you want to use the default process version instead of the version-specific process.

CAUTION: After a process is deployed, overriding it will remove all running instances. Oracle recommends that you create a new version for more changes and mark it as default, if it's required. An action which has **Use default version** selected will ensure that only the default version in Oracle Process Automation is used to create process instances. For processes whose inputs are form based, make sure the interface argument is the same.

10. Select the **Action Visibility.**

Visibility options include:

- Not Published - Only visible to the administrator. The action isn't available to add to a template and can't be added by an agent as an another action.
- Customer Visible - Optional. Used only for user interface configurations to display or hide Actions.
- Internal Only - Visible internally only.

11. Enter a context for the action.

Context options include:

- Opportunity
- Service Request
- Internal Help Desk Request
- HR Help Desk Request
- Case

12. Enter a numeric value for the **Duration of how long the task should take. Select a unit of measure for the numeric value (days, hours, or minutes).**

13. Select a **Stripe Code** (CRM, HCM, ISR, or HRSR) from the drop-down list.

Note: If you select the type as SR, you shouldn't select stripe as ISR/HRHD. This leads to ambiguity whether the underlying object created should be CRM SR or ISR/HRHD.

- If the agent wants the associated object to be CRM SR, select the following:
 - Type: SR
 - Stripe: ORA_SVC_CRM
- If the agent wants the associated object to be ISR, select the following:
 - Type: ISR
 - Stripe: ORA_SVC_ISR
- If the agent wants the associated object to be HRHD, select the following:
 - Type: HRHD
 - Stripe: ORA_SVC_HRHD

14. Select a **Category** from the drop-down list.

15. You can define a specific relationship to be created for the action by selecting an **Object Link Type** from the drop-down list. If you don't select a specific object link type, the global setting is used.

16. Check the **Copy Attachments** check box if you want all attachments to be copied from the context object to the target object. You can select to copy all attachments for the following object types:

- Cases
- Service Requests
- Help Desk Requests
- Internal Service Requests

17. Enter a description of the action and any pertinent details.

18. If necessary, make edits on the **Attribute Mapping** or **Status Mapping** tabs. These are explained next.

19. Click **Save and Close**.

Attribute Mapping Tab

Every action in an action plan has a related object (as in a task, appointment, opportunity, case, or service request) that's automatically created when the action starts.

The attribute mapping tab is where you set up the mapping of information from the action, parent case, and user-defined values into the related object when it's created.

Note: There are no attributes to map for Dynamic Processes. If you're creating a Dynamic Process Action, there isn't anything to do on this tab.

Mapped attributes come from the fields in the related object. Required attributes are automatically listed, and you can add optional attributes. The **Mapped To** column shows where the information comes from that populates the field on the related object.

CAUTION: If you map attributes incorrectly, the creation of the business objects during orchestration in Action Plans will fail.

Required fields are shown in the **Required** column. Additional fields might also be listed that can't be changed. For example, Activity Type displays Task if that action type is Task or defaults to Appointment if the action type is Appointment.

Here's how you add an attribute mapping:

1. Click the **Add** icon.
2. Select the field to be populated from the **Attribute** choice list.
3. In the **Mapped To** column, select from where the fields must be populated. Choices are: service request, action, or a user-defined value.
4. Depending on the attribute you selected in the previous step, enter free-form text to the box for free-form values. For service request or action, select the field from the choice list in the last column.

For more information about mappings for an article, see the topic Attribute Mappings for Knowledge Articles in this chapter.

Status Mapping Tab

The related business objects created for actions can have different user-defined status values. However, they must be mapped into a new set of status codes for an action in an action plan. You can do this at a global level for all actions, or individually for one action if it has unique attributes. When a user updates an object, the status mapping rules decide how the status of an action updates on an action plan. For example, when a task is set to closed or completed, then the action status is completed.

Note: If you don't define the status mapping at the action level, then the default is the global status mapping. Also, there are no statuses to map for Dynamic Processes. If you're creating a Dynamic Process Action, there isn't anything to do on this tab. There are however, predefined status value mappings that can't be changed.

For more information about the global action status configuration, see the topic Manage Mapping of Action Plan Status Values.

The following table shows the predefined Process Automation status values that are mapped with Action Plan status values.

Process State	Action Status
Active	ORA_SVC_IN_PROCESS
Completed	ORA_SVC_COMPLETED
Terminated	ORA_SVC_COMPLETED
Closed	ORA_SVC_COMPLETED

For more information about the global action status configuration, see topic Manage Mapping of Action Plan Status Values.

You can use the **Status Mapping** tab on an action to override the global status mappings. For example, if the global rule is set to an action being closed when the status is complete, but instead you want it to be closed when it's canceled, you can override the global mapping so that the action closes when both conditions are met.

1. Click the **Status Mapping** tab.
2. Click the **Add** icon.
3. Select a status from the **Status** choice list. This becomes the status that ends up on the action.

Status options include:

- o Blocked
- o Completed
- o In progress

Note: Apart from these three status values, you should not set up rules for any other status.

4. Select an attribute from the choice list.
5. Select an operator.

Operators include:

- o Contains
- o Equals
- o `Is null`
- o `Is not null`

6. Select a value for the status.

Example of a Status Mapping

Let's say you want an action to be marked completed when a service request's status is completed or canceled.

The following table shows the values to enter on the Status Mapping tab.

Column	Value
Status	Completed This is the status you want the action to be.
Attribute	Status This attribute comes from the SR.
Operator	is one of
Value	Completed, Canceled This is the request's status. You can select multiple values from the list.

Dependencies Tab

When an action is added to a template, the **Dependencies** tab shows the template name. You use this to know what templates are impacted by a change to an action. If the action is in a template, you can also view and edit the template from this tab.

Note: Edits made to templates don't affect active action plans that use the template.

Action Errors Tab

The **Action Errors** tab lets you to recreate actions for users when there are errors in action attribute mapping. For example, if the attribute in an attribute mapping is mapped incorrectly, the **Action Errors** tab is displayed. From the tab, you can see all the action plans that the action is used in, and after they're fixed, the action plan actions can be recreated directly from this tab.

This tab isn't used for Dynamic Process actions.

The Action Errors tab shows a table with the action plan number, action plan name, and the status details of the action.

Review the attribute mappings the action and correct the error. After attribute mapping for the action is corrected, you can return to the **Action Errors** tab and click **Recreate**.

Edit an Existing Action

To edit an existing action:

1. In the **Manage Action Plan Actions** task, select the template you want to edit.
2. Edit the action.
3. Click **Save and Close**.

How do I set up case visibility based on queue?

When users view lists of cases or create user-defined searches, access is based on the cumulative set of data security policies assigned to all the roles associated with them. You can restrict access based on their queue membership.

Restricting access ensures users see only the cases that are in their queue by completing the following processes in the Security Console:

- "Remove Data Security Policies from Users": If the users have been assigned other data security policies that grant them access to a larger set of cases, then you must remove such data security policies from the users.
- "Assign Data Security Policies Based on Queue": Grant queue-based visibility to cases for specific roles. This ensures that users with these specific roles can see only the cases assigned to the queues where they're a resource member.

How do I define notification triggers?

Here's how you define a Groovy script for a notification trigger:

1. Sign in to the application as a setup or administrator user.
2. Click **Navigator > Configuration > Sandboxes**.
3. Create a sandbox or select an existing one, and click **Enter Sandbox** to activate the sandbox. Your sandbox is activated, and you can see its name on the sandbox bar over the global header.
4. In the **Navigator**, click **Application Composer**. The Application Composer page is displayed.
5. Select . The section is displayed.
6. Click the **Triggers** tab.
7. From the **Action** menu, click **Add**. The **Create Object Trigger** section is displayed.
8. Create a Groovy trigger:
 - a. Specify the **Name**, **Error Message**, and **Trigger Definition** details.
 - Oracle recommends you to use the trigger type **After Changes Posted to Database**. This trigger type enables you to stop potential issues if the Groovy script is accidentally written to run indefinitely. If the trigger type is set to **Before Update to Database**, with a bad script, there may be some issues.
 - If you're creating a new object, and you want to trigger a notification when the object is created, Oracle recommends you to use the trigger type **Before Insert to Database**. However, some of the **Before** trigger types don't have all attributes exposed yet, resulting in some fields being blank. To debug your triggers if you're not getting the expected results, follow the steps in the section "Debug Groovy Triggers".
 - The `isAttributeChanged()` function works only for the **Before** trigger types. The workaround for the **After** trigger types involves retrieving the old value before the database is updated, then retrieving the new value after the update, and then comparing the two values to see whether the attribute is changed. However, this workaround works only for high-level attributes such as `criticalFlag` and `status`. This workaround may not work for the `viewRow` attribute, for example, when you're retrieving the team from .

When you create a Groovy script, you need the API names of the fields you're trying to access. To create your triggers based on parent/child fields, do the following:

- i. In the **Trigger Definition** section, click **Show/Hide Expression Palette**.
- ii. Click the **Fields** tab.
- iii. Select an **Object**.
- iv. Click the **Maximize Edit Script** arrow. The fields for the selected object are displayed.
- v. Select the API you want, and click **Insert**.
- vi. To close the expression palette, click the **Restore Edit Script** arrow, and then click **Show/Hide Expression Palette**.
- b. Click **Save and Close**.

9. Navigate to the Notification Preferences page to configure your preferences for the notifications.

For more information about configuring notification preferences, see the "Set Notification Preferences" topic.

Note: You can reuse a Groovy notification trigger if no other notification uses it.

How do I add fields to the Case Management pages?

Your application is built using Oracle Visual Builder Studio and Oracle JET components. Visual Builder Studio is a single place where organizations can manage projects, environment and repositories; a Visual Builder Designer is where you can extend your application. From VB Studio, you can open many different designers.

Visual Builder Studio is the browser-based tool that your organization can use to make modifications and extensions to the Redwood user interface. Using the extension framework, you can change the user interface such as displaying custom fields on forms, creating dynamic layouts for a form, or embedding custom content in a dynamic container in a page.

Your VB Studio instance is paired with your Test instance of Fusion Applications. This means that your design time experience will be based on data in the Test instance database and a sandbox in the Test instance (if you're working within a sandbox).

The changes you make using VB Studio are stored in an artifact called an application extension. An application extension can be something as simple as a field added to a cloned, custom, or new form, or a new container of forms. You can create extensions, then preview them to see how they look in your UI. To create a extension that impacts the data model, you must use a sandbox within Application Composer, then use the Edit Pages in Visual Builder option to expose your changes in the UI.

You navigate to the VB Studio Designer directly from within the Redwood application. VB Studio is a **design at runtime tool**, which allows you make UI changes and then immediately preview the results before publishing the changes to other users.

VB Studio is just one tool that administrators can use to make application changes. As mentioned before, you extend the underlying object model used by the Redwood application with Application Composer. The model changes you make in Application Composer are reflected in the RESTful API for those objects, and thereby become available to the VB Studio Designer for use in UI extensions.

What's Case Management?

Case Management is a professional and collaborative process that provides the ability to manage long running processes to meet an organization's needs related to managing escalations, investigations, problems, applications, and other issues.

For example, a case is created whenever an application for specific services is requested by an applicant. Applications are typically assessed for eligibility of services, and upon successful assessment, a Case is created and managed. Unlike service requests, cases typically stretch over a long period of time, involve multiple parties as well as multiple documents and messages to deliver a solution or service, and often require complex business processes for successful completion.

The overall case management process is iterative, non-linear, and cyclical, with its phases being revisited as necessary, until the intended outcome is achieved. A Case can be different than a service request, as Cases are often employee, client, citizen, or student focused, and the outcome is often difficult to predict or measure. A case can be a process that ties together one or more services (benefits) delivered by an institution to a person (individual), group (household), or organization (customer account) to fulfill the specific intent and needs of the recipient.

For a detailed video presentations, see *Case Management for Employee Relations and Investigations (HR Help Desk)* on Cloud Customer Connect. (Sign in is required)

How do I enable users to create an audit trail?

You can create an audit trail of changes made to cases.

By default, only certain fields of the Case object are audited. If you want more fields to be audited, you must add them. You can also do an audit for the child objects by doing some configuration. Similarly, you must enable the audit for any administrator-defined child objects that you create from Application Composer.

To enable the audit for more fields or the child objects of the Case object:

1. Sign in to the application as a setup user or administrator.
2. Navigate to the Setup and Maintenance work area.
3. Open the Tasks panel tab and click **Search**.
4. In the **Search** window, search for and click the **Manage Audit Policies** task.
5. On the Manage Audit Policies page, click **Configure Business Object Attributes**.
6. On the Configure Business Object Attributes page, select **Case** from the **Product** drop-down list.

All the objects that can be audited are displayed. This includes the administrator-defined objects or administrator-defined child objects for predefined entities created using Application Composer.

For the Case object, the **Audit** check box is selected by default. The subset of attributes that can be audited are also displayed.

7. Click **Add**.
8. In the **Select and Add Audit Attributes** dialog box, select the check box next to the attribute that you want to add, and click **OK**.
9. To add attributes to audit for each predefined or administrator-defined child object of the Case object, select the check box next to the object.

Note: The predefined child objects and administrator-defined child objects of the Service Request object are displayed. For each of these child objects, one or more attributes are audited by default.

10. Repeat steps 7 and 8 to add more attributes.
11. Click **Actions > Synchronize**.
12. Click **Save and Close**.

Note: The audit for the Category object is enabled by default. But you can add more attributes by following the same steps as above.

How do I define access group-based data security policies?

As a Customer Relationship Management Application Administrator you can define access group-based data security policies on requests and cases. Though predefined data security policies are available, you've the option to define more data security policies based on access groups.

As compared to SQL-based data security policies, access groups are another way of granting data permissions to users. Instead of creating security policies using SQL, you can use object-sharing rules in the sales and service access management UI to define your visibility criteria.

For more information about creating data security policies, see the Access Groups chapter in the Oracle Fusion: Securing Sales and Service guide.

If you're replacing existing SQL-based data security policies with policies based on access groups, then remember to set an end date for those policies.

How do I manage relationships for action plans?

Action plans can have relationships to other objects. For example, an action can be blocked by another object, or a duplicate of another object.

About Relationships

Agents can create business-driven relationships between cases and leverage them to make updates across SRs cases. You must enable this feature in Functional Setup Manager.

Enable Relationships

To enable the Relationships feature:

In the Setup and Maintenance work area go to the following:

- Offering: Service
- Functional Area: Action Plans
- Task: Manage Action Plan Profile Options

1. Select the profile value **ORA_SVC_AP_ENABLE_OBJECT_LINK**.
2. In the drop-down list of the value, select Yes.
3. Click **Save and Close**.

Now, you can set the type of object link that's used for the relationship. For example, blocked, or duplicate.

1. Click the profile value **ORA_SVC_AP_DEFAULT_OBJECT_LINK_TYPE**.
2. Select the relationship type from the Profile Value drop-down list.

3. Click the **Add (+)** icon to continue adding the relationship types you want to use.
4. When you have finished, click **Save and Close**.
5. Click **Done**.

Manage Link Types

You can manage link types in the Manage Object Link Types task.

In the Setup and Maintenance work area go to the following:

- Offering: Service
- Functional Area: Service Request
- Task: Manage Object Link Types

To edit or disable the predefined object link type:

1. Click the link type in the list.
2. Make your changes. To disable, deselect the disable check box.
3. Click **Save and Close**.

To create a link type:

1. Click **Create Link Type**.
2. Enter all the required information:
 - Name
 - Short Name
 - Outward Value
 - Inward Value
3. Select the check box to enable the type.
4. Click **Save and Close**.

How do I create cases by interview?

You can have your users create cases through an interview-style format using Oracle Intelligent Advisor. Using an interview to create cases, can ensure cases are created only after all critical questions are answered.

To create cases by interview, you use Intelligent Advisor to create the interview, then Visual Builder Studio to make the interview available to your users.

Note: This feature requires a license for Oracle Intelligent Advisor.

The steps to enable and use the **Create Case by Interview** button on the Case List page are:

1. Open the Case List page in Visual Builder Studio (**service > ec**) and find the **Constants** tab in the Right Hand Panel.
2. Click the **Constants** tab.
3. Set the values for these variables on the **Constants** tab.
 - `showCreateCaseByInterviewButtonOnListPage: true`

- intelligentAdvisorHubURL: Enter the Intelligent Advisor Hub URL where your interview is deployed.
- createCaseInterviewName: Enter your interview name.

4. Publish the changes.

The steps to enable and use the **Assess Case** link on the Case Details page are:

1. Open the Case Details page in Visual Builder Studio (**service > ec**) and find the **Constants** tab in the Right Hand Panel.
2. Click the **Constants** tab.
3. Set the values for these variables on the **Constants** tab:
 - intelligentAdvisorHubURL: Enter the Intelligent Advisor Hub URL where your interview is deployed.
 - assessCaseInterviewName: Enter your interview name.
 - showAssessCaseLinkOnDetailsPage: true
4. Publish the changes.

Where do I find resources for Case Management analytics?

Here's where you can find *additional information* on Fusion Sales, Service, and Help Desk analytics:

- *Prebuilt Fusion Service analytics* spreadsheet.
- *Creating and Administering Analytics* guide.
- *Subject Areas for Transactional Business Intelligence in Fusion Sales and Fusion Service* guide.
- *Security for Sales Analytics and Reports* guide.
- *Securing Sales and Fusion Service* guide.
- *Oracle Transactional Business Intelligence* guides.
- *Fusion Service Report Sharing Center* cloud customer connect.
- *Analytics and Reporting Best Practices* support resource center.
- *R13.x CX OTBI Subject Area to Database Lineage Mapping Spreadsheet*
- *About Creating Your Own Subject Areas*

How do I use Adaptive Search for Case Management?

Adaptive Search is a high-performance search engine that provides keyword searching and enhanced filtering capabilities. Adaptive search is used on the Case List pages. To enable Adaptive Search for Cases, complete the following procedure:

Before you start

You must have the Application Implementation Consultant job role to complete the setup.

1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Configure Adaptive Search

2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select the case object to enable for Adaptive Search
4. Click **Publish**.

Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the Monitor tab. The process can take several minutes to complete, depending on your data volume.

5. Click the **Monitor** tab and **Publish** subtab to monitor the process. If the process completes with errors, contact your help desk.

What role or privilege do I need to create a case?

In order for a user to access the Create Case page, administrators need to add the following privilege or roles:

Enable the user with one of the following:

- Create Case privilege
- Case Worker role
- Case Manager role

Why isn't queue assignment through object workflow working for certain users?

If your queue assignment is configured to be triggered through Object Workflow on update, make sure the user has Edit access to the Case record.

How can I create a case from an inbound email?

You can enable a feature in Case Management that allows cases to be automatically created from inbound emails from your customers.

How does it work?

When a case is created from an inbound email, the subject of the email becomes the title of the case. The body of the email is captured in the problem description, and creates a customer entry message as a conversation.

If the sender isn't known, based on a lookup of the email address, a case is created without a contact associated.

Once a Case is created, case workers can respond to that email from within the context of the Case. As case workers and the customer correspond, all information is captured as part of a conversation message thread.

How do I enable this feature?

Before configuring this feature, ensure that your inbound email is setup and configured properly. For the setup and configuration steps for inbound email see: [How do I set up inbound and outbound email?](#)

Once your inbound email setup and configured, you need to create a new channel.

Note: You need to have Administrator privileges to create the channel.

1. Navigate to Setup and Maintenance.
2. Select the Service Offering.
3. Go to Communication Channels > Manage Communication Channels > Create Channel.
4. Enter all the requested information.
5. Set the **Purpose Code** to Case.

For more information about creating a communications channel see: [How do I configure an email channel?](#)

Now, when emails are sent into the email address identified in the **Account Name** a new case is created.

What privileges are needed?

Privileges Needed to Create a Case from an Inbound Email

Name	Code	Description
View Conversation Message	SVC_VIEW_CONV_MSG	Allows a user to view a conversation message.
Participate in Customer Conversation	SVC_PARTICIPATE_IN_CUSTOMER_CONVERSATION	Allows a user to participate in a customer conversation.
Participate in Collaboration Conversation	SVC_PARTICIPATE_IN_COLLAB_CONVERSATION	Allows a user to participate in a collaboration conversation.

Note: If the customer sends an initial inbound email that doesn't have a subject, the Case creation will fail because the title of the Case is a required field. If this is a concern, please contact My Oracle Support and they can provide you with a workaround.

In what table are cases and case activities stored?

Tasks and Appointments for all objects (including Cases) are stored in the Activities table **ZMM_ACTY_ACTIVITIES**. You find specific cases and appointments using the following:

A specific case task be found by:

- **SELECT * FROM ZMM_ACTY_ACTIVITIES WHERE ACTIVITY_FUNCTION_CODE = 'TASK' AND CASE_ID = <CASE_ID>;**

A Case appointment can be found by:

- **SELECT * FROM ZMM_ACTY_ACTIVITIES WHERE ACTIVITY_FUNCTION_CODE = 'APPOINTMENT' AND CASE_ID = <CASE_ID>;**

How do I enable household creation and manage households for cases?

Authorized case owners can use Households to manage groups of related individuals. Here's how to configure, create, and edit Households:

Case edits can be made from the **Case Details** page to all key information about a Household including owner, address, contacts, and relationships.

- To add a Household, Case owners must have appropriate Case-related privileges (SVC_EDIT_CASE_PRIV, 'SVC_MANAGE_CASE_HOUSEHOLDS_PRIV) and Household-related privileges (ZCM_VIEW_SALES_GROUP_PRIV).
- To remove a Household or choose a Household as the Primary Household, Case owners must have appropriate Case-related privileges (SVC_EDIT_CASE_PRIV, SVC_MANAGE_CASE_HOUSEHOLDS_PRIV).
- To view and edit the details of a Household, Case owners must have appropriate Case-related privileges (SVC_MANAGE_CASE_HOUSEHOLDS_PRIV) and Household-related privileges (ZCM_VIEW_SALES_GROUP_PRIV, 'ZCM_UPDATE_SALES_GROUP_PRIV).

To Enable Household Creation: Create a Sandbox (including the Structure tool) > Structure > Sales > Households > Show in Navigator and Show in Springboard. (Your user must have the appropriate administrative privileges.) Optional: Move Households from Sales to Service or Help Desk.

To Create Households: Go the Sales springboard (or wherever you moved it) > Households > Create. (Your user must have the appropriate Household privileges.)

To Edit Households: Use the Households folder in the Case Details page. (Your user must have the Manage Case Households privilege.)

Can I use HCM Data Loader (HDL) or HCM Spreadsheet Data Loader (HDSL) to convert requests to cases?

Help Desk and Case Management don't use HDL/HDSL, but they use something similar to it known as Import and Export management.

You can find more information about Import and Export Management [here](#).

How do I define access groups to secure cases?

Use Access Groups to secure cases so users only see the cases they need to see. Case Management provides configurable rule-based access controls that decide how your users get visibility to Case data. You must enable Access Groups for Case Management.

- Access Groups can be enabled and configured by an authorized administrator.
 - Users with the Manage Group Access privilege (ZCA_MANAGE_GROUP_ACCESS_PRIV) can create and manage access groups.
 - By default, the Sales Administrator job role and the IT Security Manager job role have the Manage Group Access privilege.
- Users must be assigned the duty role Access Groups Enablement, to get the access provided through access groups. By default, users assigned any of these roles have this privilege:
 - Resource Abstract role
 - Any Predefined Service or Sales job role.

Navigate to the Sales and Service Access Management page.

Setup and Maintenance

- Offering: Sales
- Functional Area: Users and Security
- Task: Manage Sales and Service Access

The following Access Groups are preconfigured:

- All HRHD Cases
- All ISR Cases
- Business Unit CRM Cases
- Business Unit HRHD Cases
- Business Unit ISR Cases
- Case Assignee
- Case Assignee Hierarchy
- Case Contact
- Case Creator
- Case Primary Contact
- Case Queue Member
- Case Queue Member Hierarchy
- Case Team

What's the action plan due date value mean?

The due date for the action plan on a case can be one of three values. 1) Based on a calculation within the action plan (default). 2) Based on the date on the Task or Appointment within the Action Plan Action. 3) No due date.

The Action Plan Due Date can have three values:

1. Option 1 (Default): Due Date based on a calculation within the Action Plan using the Duration values you provide in the Action Plan Template.
 - o If in the next 24 hours: Due Date is in [Hours].
 - o If more than 24 hours or is overdue: Due Date is [Action Plan Action Due Date]
 - o If appropriate: [Overdue] is prepended to the Hours/Due Date.
2. Option 2: Due Date based on the date on the Task or Appointment within that Action Plan Action.
 - o If in the next 24 hours: Due Date is in [Hours until Task/Appointment Due Date]
 - o If more than 24 hours or is overdue: Due Date is [Task/Appointment Due Date]
3. Option 3: Show no Due Date.
 - o You can choose which of these settings you want by configuring ORA_SVC_AP_DISABLE_ALL_DATES and ORA_SVC_AP_ENABLE_ACTIVITY_DATES in the Manage Action Plan Profile Options task.

Your chosen display type appears everywhere the Due Date is displayed:

- in the Spotlight area
- in the mini Spotlight area (if you're using the Service Center Foldout page)
- the Pending area
- the Action Plan diagram view
- the Action Plan list view
- the Action Plan summary

Does Case Management integrate with Microsoft Teams?

Yes. Both Help Desk and Case Management support Microsoft Teams as a channel option in conversations. Email and Slack are also supported.

Also see [How do I install Microsoft Teams app and add it to my team?](#)

How do I remove a smart action from the Smart Navigator?

You can remove entries from the Smart Navigator so that unnecessary actions aren't shown to agents. For example, only those modules used and relevant to the agents can be listed, while all others are hidden.

Showing only relevant links to users simplifies navigation for agents and avoids confusion if they were to navigate to a module that isn't in use.

Limiting options is done by extension in Visual Builder Studio (VBS). The Help Desk Administrator needs the ability to make changes using VBS. No extra privileges are required.

1. Navigate to Visual Builder Studio.
2. Navigate to Oracle CX Help Desk UI Extension App > `helpdesk`
3. Click the Variables tab.
4. Click the Constant **hideHcmNavEntries**.
5. For **Default Value**, add the exact names of the items from the Smart Navigator, using double quotes around each item, comma separated items, and the entire list within brackets. For example, `\["Workforce Modeling","Learning","Compensation","Team Social Reputation"\]`
6. **Save** your changes.
7. **Preview** to make certain they're showing correctly.
8. **Publish** your changes.

Note:

- The items can either be the general category or individual items within the category.
- When entering the values in **hideHcmNavEntries**, the names must exactly match those found in the Smart Navigator. The names are case-sensitive.

For a video demonstration of this feature, see: [Limiting HCM Smart Navigator Options in Help Desk](#)

How do I configure my first access group in Case Management?

Create an access group to configure rules to restrict what Cases a user sees. Here's a brief walk-through for configuring an access group for a common Case Management use-case.

Access Group rules can be built upon many Case attributes. For example, case creator, case team members, case contacts, case assignee, case assignee hierarchy, case queue membership, case queue membership hierarchy and case business units.

In this example a case worker can view, update, and delete only the cases that are assigned to them.

Also see:

- *How do I define access groups to secure cases?*
- *How do I define access group based data security policies?*

1. Sign in to your server as an administrative user.
2. Go to **Tools > Security Console**.
3. Search for **Case Execution**. For example: ORA_SVC_CASE_EXECUTION role.

Note: For a Case Manager, replace ORA_SVC_CASE_EXECUTION with ORA_SVC_CASE_SUPERVISION and ORA_SVC_CASE_WORKER_JOB with ORA_SVC_CASE_MANAGER_JOB.

4. Copy the role (either copy top role or inherited role).
5. Go to the **Data Security Policies** tab, and remove all **Grant on Cases**.

Note: If you're configuring for Case Manager: ORA_SVC_CASE_SUPERVISION then you'll see only one **Grant on Cases** so remove just that one.

6. After deleting both grants, click **Next** and **Submit and Close**.
7. Copy Case Worker: ORA_SVC_CASE_WORKER_JOB role using either top role or top role and inherited roles.
8. Go to the **Role Hierarchy** tab and delete the ORA_SVC_CASE_EXECUTION role.
9. Go to the **Role Hierarchy** tab and delete the ORA_SVC_CASE_EXECUTION role.
10. Now, add the new custom execution role you created in earlier step.
11. Click **Next** and **Submit and Close**.
12. Select **Users** in the left-hand panel of the Security Console and add the new role you created.

Note: These are minimal required roles. You can have more roles as per your use-cases.

13. Once the roles are added, go to **Tools > Scheduled Processes > Schedule New Process** and run the following jobs in this order:
 - Import User and Role Application Security Data
 - Send Pending LDAP Request
 - Retrieve Latest LDAP Changes
14. Once the jobs have completed, go to **Tools > Sales and Service Access Management** and search for the Access Group corresponding to your new job name.
15. Click the Access Group name link and make sure the correct user is shown as **Resource** in the **Overview** tab.
16. Click the **Object Rules** tab and search for the **Case** object.

17. Click **Add Rule** and select the rule for your use-case. This example uses the **Case Assignee** rule.

After adding the rule, you can select the access level appropriate for your use-case. This example gives full access to case worker user.

Note: There are many ready-to-use rules that can suit your use-case and you can add rules from any of following ready-to-use rules listed below. (CRM, HRHD, or HR Helpdesk Service Request, and ISR, Internal Service Request, refers to the stripe code that you've configured through the profile option ORA_SVC_CASE_DEFAULT_STRIPE_CD.) If your use-case isn't covered by any of these ready-to-use rules then you can create a custom rule by clicking **Create Rule**.

Ready to Use Rules

Number	Rule	Use Case
1.	All CRM Cases	Access all CRM Cases
2.	All HRHD Cases	Access all HRHD Cases
3.	All ISR Cases	Access all ISR Cases
4.	Case Creator	Cases where the access group member is the case creator
5.	Case Assignee	Cases where the access group member is the case assignee
6.	Case Assignee Hierarchy	Cases where the access group member is in the management chain of the case assignee
7.	Case Team	Cases where the access group member is in the case team
8.	Case Contact	Cases where the access group member is in the case contact
9.	Case Queue Member	Cases where the access group member is associated with the case queue
10.	Case Queue Member Hierarchy	Cases where the access group member is in the management chain of the case queue member
11.	Case Primary Contact	Cases where the access group member is the case primary contact
12.	Business Unit CRM Cases	CRM cases in the business units in which the access group member is associated
13.	Business Unit HRHD Cases	HRHD cases in the business units in which the access group member is associated
14.	Business Unit ISR Cases	ISR cases in the business units in which the access group member is associated

18. Click **Save**.
19. Click the Rule Name link. For example, click the Case Assignee link and make sure the rule is active.
If the rule isn't active, select the **Active** checkbox then go to **Actions > Save and Publish**.
20. Once published, click **Actions > Save and Close**.
21. **Save and Close** the page.
22. Go to the **Monitor** tab in the left-hand panel and click **Update Groups and Members**.
23. Click **Start Process**.
24. Once the job successfully completes, go to the **Publish Rules** tab.
25. Run the job by clicking **Start Process**.
26. Once the job completes successfully, if you've any custom object or custom field created through app-composer then go to the **Synchronize Custom Objects and Fields** tab and run the job by clicking **Start Process**.

Note: This is a one time activity. All new further records will be assigned automatically. However, whenever a rule is updated, run this job again to apply the updated rule to all existing Cases.

27. In the next window, select the **Basic Options** parameters: Object = Case and Record Selection = All Records.
28. Click **Submit**.
29. When the job successfully completes, you've now configured your first access group.

Your Case Worker will now have access to only those cases assigned to them and they will get the access based on the configured access level (READ/UPDATE/DELETE/FULL).

Tip:

If unanticipated records are shown on the Case List page or when you drill down to a record the Case Details page and it doesn't load (or shows an error message **Couldn't load data: status 404** , you might need to republish the Case object in Adaptive Search.

1. Go to the **Configure Adaptive Search** task.
2. Click the **Setup** tab.
3. Make sure **Case** object is selected.
4. Click **Actions > Full Publish**.
5. Wait for the publish to complete.

You can track the progress from **Monitor > Publish**.

How do I create a new access group rule using a new field?

In addition to the many ready-to-use access group rules, you can also add your own rules. In this example, we add a new rule based on a new field from the Case child object Case Contacts.

1. Sign in to the application as admin user.
2. Go to the **Manage Object Sharing Assignment Objects** task.
3. Open the task and select the **Case** row.
4. Click **Create Child**.

5. Enter a **Name**. For example, Case Contact.
6. Enter a **Code**. For example, Code Case_Contact.
7. Select your desired View Instance Object (in this example: CaseContact).
8. Click **OK**.
9. Click the **Attributes** tab in the **Case Contact: Details** section.
10. Click the + Add icon and select the View Object Attribute as per your business logic.

Note: This is the attribute that appears in your new access group while creating custom rules.

11. Click **Save and Publish** and wait for publish to complete. You can check the progress using the refresh buttons.
12. Click **Save and Close**.
13. The configuration is complete.

You can now create a custom rule on the Case Contact Relationship attribute.

Related Topics

- [How do I configure my first access group in Case Management?](#)

How can I see the access groups that are associated with a user?

To check access groups for a user, follow these steps:

Navigate to **Tools > Sales and Service Access Management > Explore Access**.

Enter the **User Name**, **Object** (Case), and **Public Unique Identifier** and click **Explore**.

Why can't I see all case records on the Case List page?

Either access groups aren't configured properly for the user or there's an issue with your elastic configuration.

To verify access groups are configured or assigned properly for the user, see [How can I see the access groups that are associated with a user?](#)

To check for an issue with your Elastic configuration, navigate to: **Setup and Maintenance > Configure Adaptive Search > Setup > Action > Partial Publish** (this can take a few minutes to complete).

Why aren't my access groups working as expected?

It could be that one or more of your access groups aren't published.

Navigate to **Tools > Sales and Service Access Management > Open Access Group > Object Rules > Open the Access Group Rules**.

If you see inconsistent publish state, discard the old rule and create a new one.

Why can't I see older cases?

If you can access newly created cases but can't see older, cases that you created before, run the **Perform Object Sharing Rule Assignment Processing** job.

Navigate to **Tools > Scheduled Processes > Schedule New Process**. Run the job **Perform Object Sharing Rule Assignment Processing** (this can take a few minutes to complete).

Why can I see cases that I shouldn't be allowed to see?

Make sure the data security policy **Grant on Cases** is removed from all duty roles that the user is associated with.

1. Navigate to **Tools > Security Console > Job > Clone Case Supervision** (or Case Execution) **Role > Data Security Policies**
2. Remove **Grant on Cases > Save and Close**.
3. Navigate to **Tools > Security Console > Job**
4. Clone the predefined Case Manager/Worker job role Role Hierarchy and Remove the predefined Case Supervision or Case Execution Role.
5. Add the Cloned Duty role (created in the first step)
6. Click **Save and Close**.
7. Confirm the Job and Duty Roles don't contain **Grant on Cases**.
8. Run the following jobs in the following order:
 - o Import User and Role Application Security Data
 - o Send Pending LDAP Request
 - o Retrieve Latest LDAP Changes

To trigger the jobs, navigate to: **Tools > Scheduled Processes > Schedule New Process**.

In what sequence should I perform jobs after I set up access groups?

Jobs should be executed in following order:

1. Update Group and Members
2. Publish Rules
3. Sync Custom Objects and Fields (only if you've added custom objects and fields)
4. Perform Object Sharing Rule Assignment

To trigger the jobs, navigate to: Tools > Scheduled Processes > Schedule New Process

Why don't I see my custom role in the corresponding system access group?

First, check to see that the custom role is associated with a user which contains the Resource role. Then, update group and members.

1. Check role association: **Tools > Security Console > Users**.
2. Update group and members: **Tools > Sales and Service Access Management > Configure Groups > Actions > Update Groups and Members**.

How can I configure access groups for only users who are employees (not resources)?

Here are the high-level steps:

1. Clone the Case Worker and Manager Job Role and related Supervisor Duty roles respectively.
Also see: [*Why can I see cases that I shouldn't be able to see?*](#)
2. Add Employee users to the new job role.
Also see: [*Why don't I see my custom role in the corresponding system access group?*](#)
3. Associate access group rules to the system access group.
4. Publish the access group rules.

Can I change the stripe code on an existing action?

No. You'll need to create a new action with the desired stripe.

