Oracle Fusion Service Case Management

How do I get started with Case Management?

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons ? to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 About Case Management

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)

2 What's do I need to do to get started with Case Management?

Must Do

These are the most critical tasks you must do to use Oracle Case Management. These include, assigning case job roles, setting the case stripe, and enabling case indexing.

Review Documentation

Review any existing documentation, tutorials, and videos. Start with these:

- *Oracle Help Center*.
- *Case Management in Help Desk*

  This requires a sign in to Cloud Connect. It's free!
- *Secure Site Videos for Visual Builder Studio*

  This site requires a sign in. Ask your Oracle contact for access.

  The Visual Builder Studio videos are in the Implement Next Gen Sales folder. (They do apply to case too!)

Configure Case Security

The first thing you need to do is assign Case job roles to the appropriate users.

For a video presentation about security for Help Desk, see *Security for HR Help Desk (for beginners)* on Customer Connect (sign in required).

- Go to: Tools > Security Console > Users
  - Assign ORA_SVC_CASE_MANAGER, ORA_SVC_CASE_WORKER, and ORA_SVC_CASE_ADMINISTRATOR as appropriate.
  - Oracle also recommends assigning the Resource Abstract and Employee Abstract roles. If the user will be performing administrative duties, assign the Service Request Administrator role.
- After assigning roles, optionally run these scheduled jobs in this order:
  a. Import User and Role Application Security Data
  b. Send Pending LDAP Request
  c. Retrieve Latest LDAP Changes
- Optionally:
  - Review predefined Case privileges for Case roles and make any changes to meet your specific requirements as needed.
  - Also, consider using Access Groups for more security purposes.
    - *How do I configure my first access group in Case Management?*
      - *How can I see the access groups that are associated with a user?*

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

Set Stripe

Set the default stripe for your Cases in Setup and Maintenance

- Navigate to: Setup and Maintenance and search for the task: Manage Case Profile Options > ORA_SVC_CASE_DEFAULT_STRIPE_CD (default value is CRM)
    - The Primary Contact picker on both the Create Case and Case Details pages displays:
        - Contacts for CRM stripe
        - Employees for HR Help Desk and Internal Help Desk stripes

Enable Indexing

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, enable indexing for cases in Setup and Maintenance.

- For release 25C and after:
    - Setup and Maintenance > Search for the task > Configure Adaptive Search
    - Setup > Select **Case- Redwood** > Go to **Actions** > **Partial Publish**

Should Do

These setup tasks are important for using Oracle Case Management, but aren't critical. For example, configuring the case list page, managing case types and case categories, configuring action plan features, and enabling case audit.

Configure the Case List Page

To configure the Case List page, go to:

- Setup and Maintenance > Search > Configure Adaptive Search > Configure UI > Case Redwood
    - Display in UI- Choose the appropriate columns and **Save**.
    - Enable for Group By- Choose appropriate columns and **Save**.

> **Tip:** Be patient. These changes can take a few minutes to take effect

Manage Case Types

To add or enable case types, go to:

- Setup and Maintenance > Service > Case Management > Manage Case Types.
    - Enable the predetermined types that you want or add types that you need.

Manage Case Categories

To add or enable case categories, go to: Setup and Maintenance > Service (or Help Desk) > Case Management > Manage Categories for Cases.

Configure Action Plan Features

To enable cases in action plans, go to: Setup and Maintenance > Service (or Help Desk) > Case Management > Manage Case Profile Options: SVC_ENABLE_CASE_IN_ACTION_PLAN

Enable Audit

To enable audit for the case object, go to:

- Setup and Maintenance > Search > Manage Audit Policies
- Oracle Fusion Applications > Configure Business Object Attributes > Product > Service > Enable Case
  - Audited Attributes > Create > Verify desired attributes then **Save and Close**.
- Audit Level > Auditing > **Save and Close**.

Could Do

Here are some Oracle Case Management features that are nice to have, but you can still use the application without them. For example: Manage case relationships, action plan actions, case queues and assignment rules, case households, case reporting, and build and implement case extensions.

Enable Relationships

Agents can create business-driven relationships between cases and use them to make updates across SRs cases. This is optional, but Oracle recommends enabling relationships.

> **Note:** Relationships are referred to as **Object Links** in the Admin UI.

To enable relationships, go to:

- Setup and Maintenance > Service (or Help Desk) > Action Plans > Action Plan Profile Options
- Edit ORA_SVC_AP_ENABLE_OBJECT_LINK and ORA_SVC_AP_DEFAULT_OBJECT_LINK_TYPE.

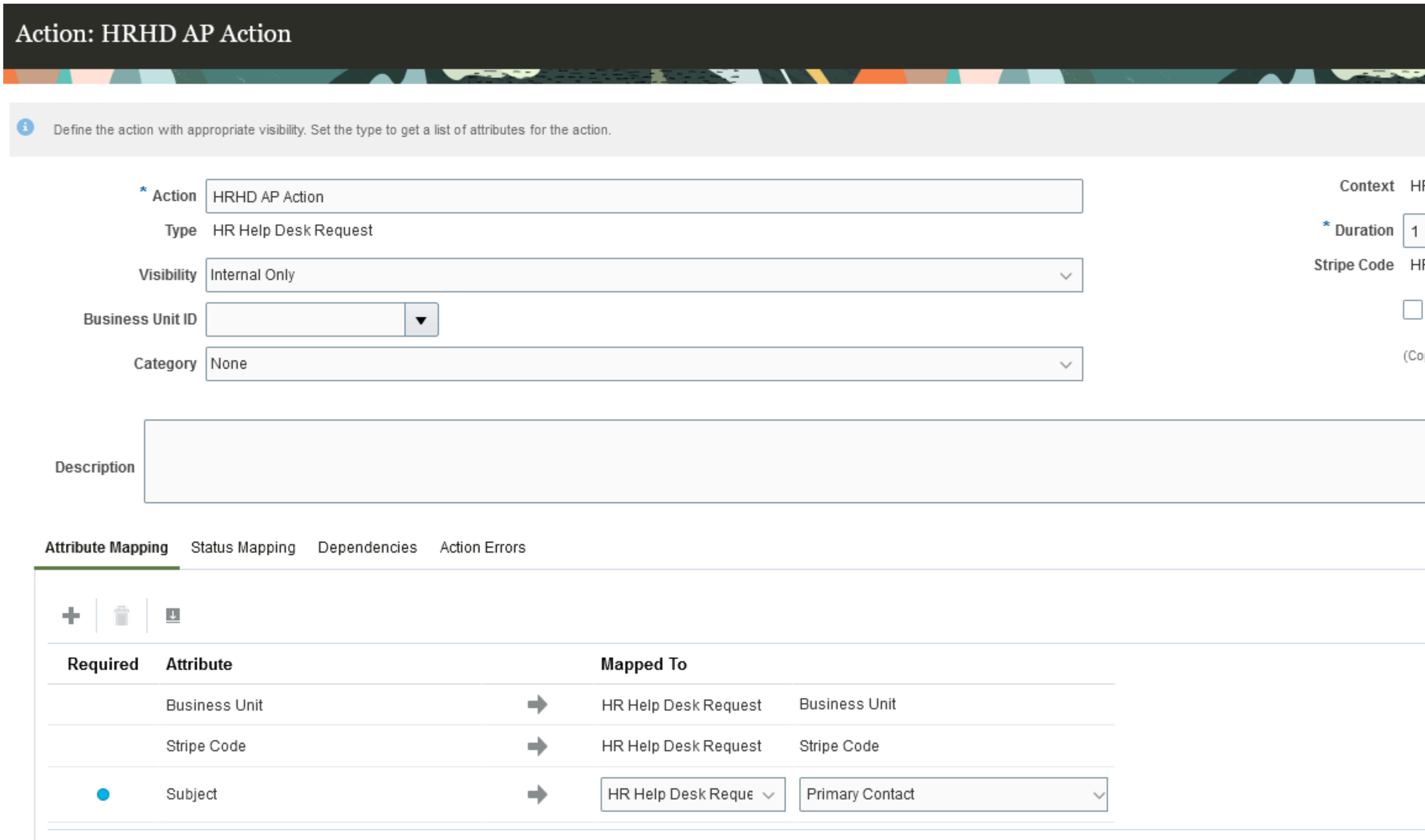
Create Action Plan Actions

For a video presentation about Actions and Action Plans for Help Desk, See *Deep Dive into Actions and Action Plans for Help Desk on Customer Connect* (Sign in required).

To create a case from a Service Request (SR) or a Help Desk Request, you can create action plan actions. To do this, go to:

- Setup and Maintenance > Service (or Help Desk) > Action Plans > Manage Action Plan Actions > Create Action
  - Common settings include:

- Object Link Type
- Copy Attachments
- Primary Contact Party ID



Create Case Queues and Assignment Rules

Use the **Manage Queues for Cases** task to create your queues and then create assignment rules on the Case Redwood Queuing rules set.

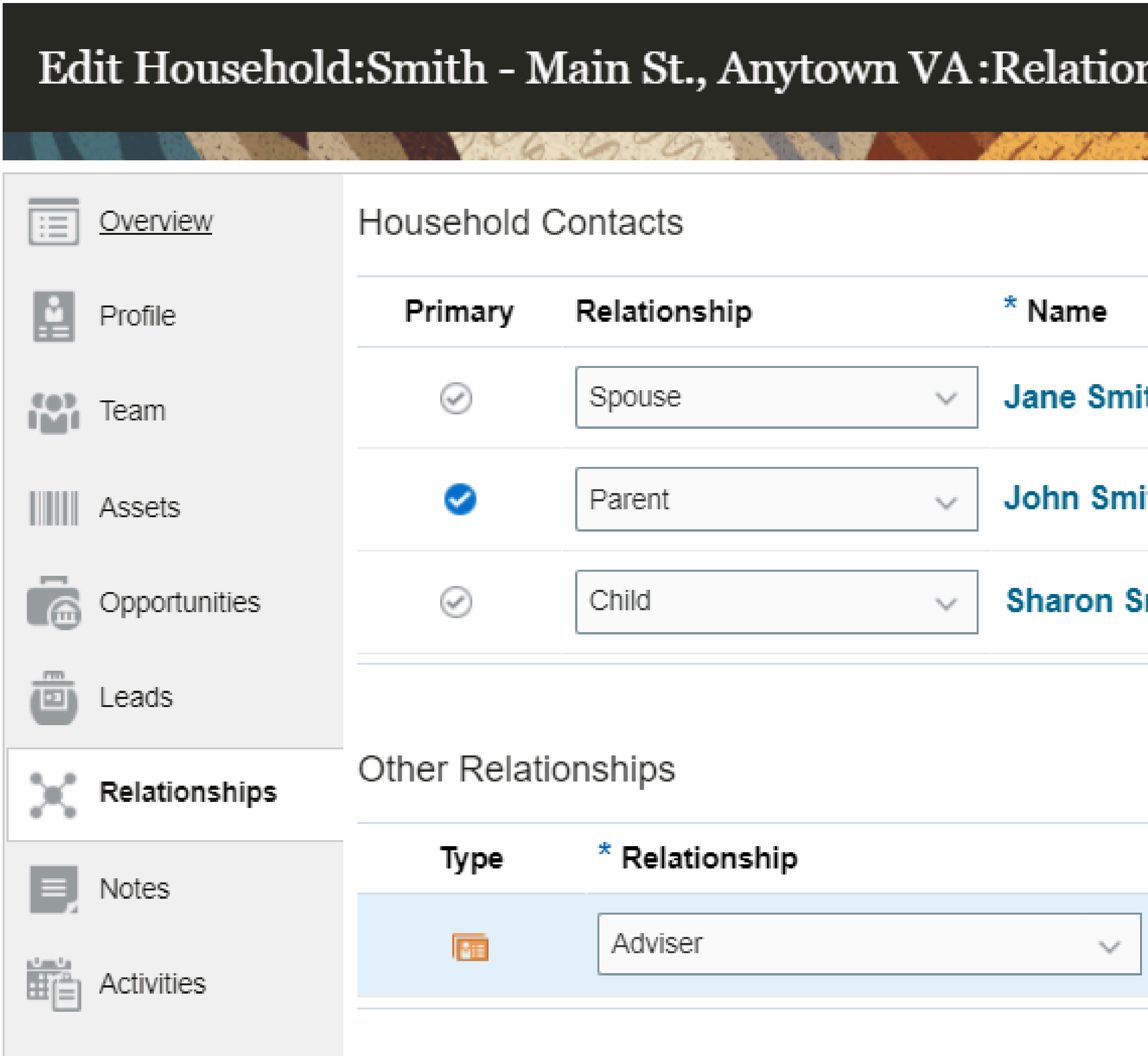
For a video presentation about routing and queuing, see *Routing and Queuing for HR Help Desk* on Customer Connect (sign in required).

1. Go to Setup and Maintenance Service > Case Management > Manage Queues for Cases task.
2. Create your queue.
3. Go to Setup and Maintenance and search for the **Manage Service Assignment Rules** task
4. Select the **Case Redwood Queuing Rule** category.
5. Add rules based on your business requirements and click **Publish**.
6. In Setup and Maintenance, set the profile option **ORA_SVC_CASE_ASSIGN_TO_QUEUE_ON_CREATE** to **Yes** .

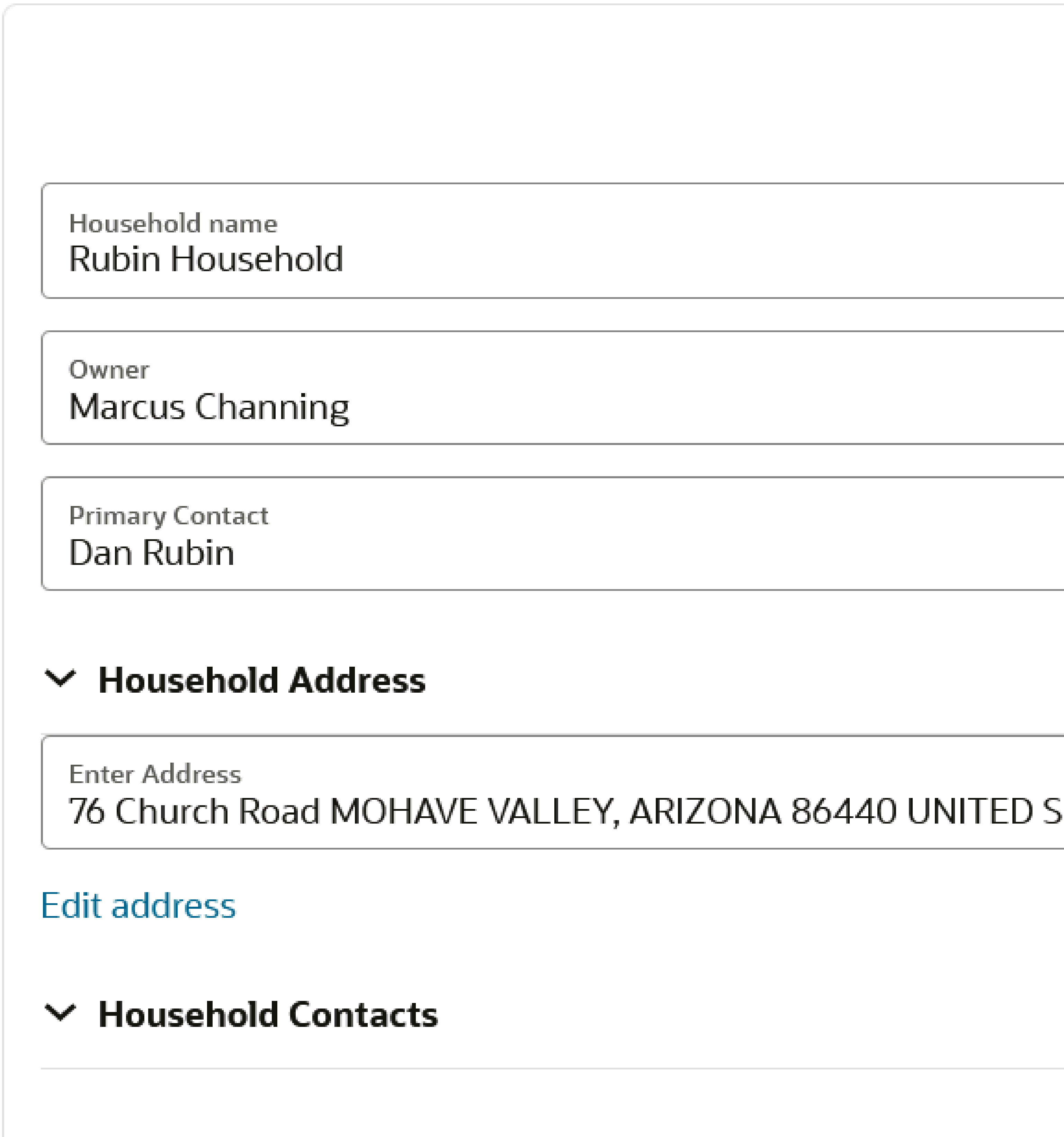
Configure Households

First, enable Household Creation by creating a sandbox (including the **Structure** tool. Create Sandbox > Structure > Sales (or Service, or Help Desk) > Households > Show in Navigator and Show in Springboard.

To Create Households: From the Springboard: Households > Create



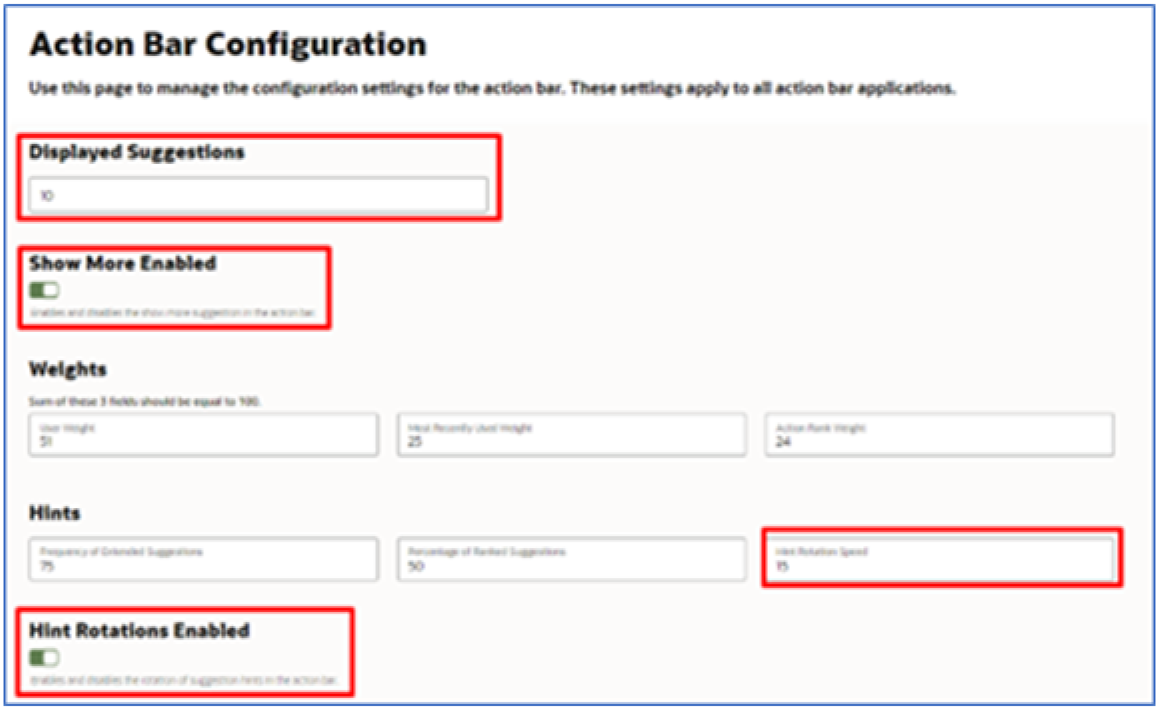
To Edit Households: Use the Households folder in the Case Details page.



Note: Users must have the Manage Case Households privilege to create and edit households.

Configure the Action Bar

- Go to https://[your server]/fscmUI/redwood/service/ec/container/sr/assistant-admin
    - This page requires the privilege ZCA_MANAGE_SENSING_AGENT_PRIV.
- Common changes are highlighted in the following image. More configuration information can be found in the *What's New Section for release 23B* on Cloud Readiness Service Center.



Review Reporting for Cases

For a video presentation about reporting, see *OTBI Reporting for Help Desk* on Customer Connect (sign in required).

- Navigate to: Reports and Analytics > Browse Catalog > Shared Folders > Service > Embedded Content > then all the Case subject areas.

  Note: All the Case subject areas are for cases of all stripes including Service and Help Desk.

Build Extensions in Oracle Visual Builder Studio

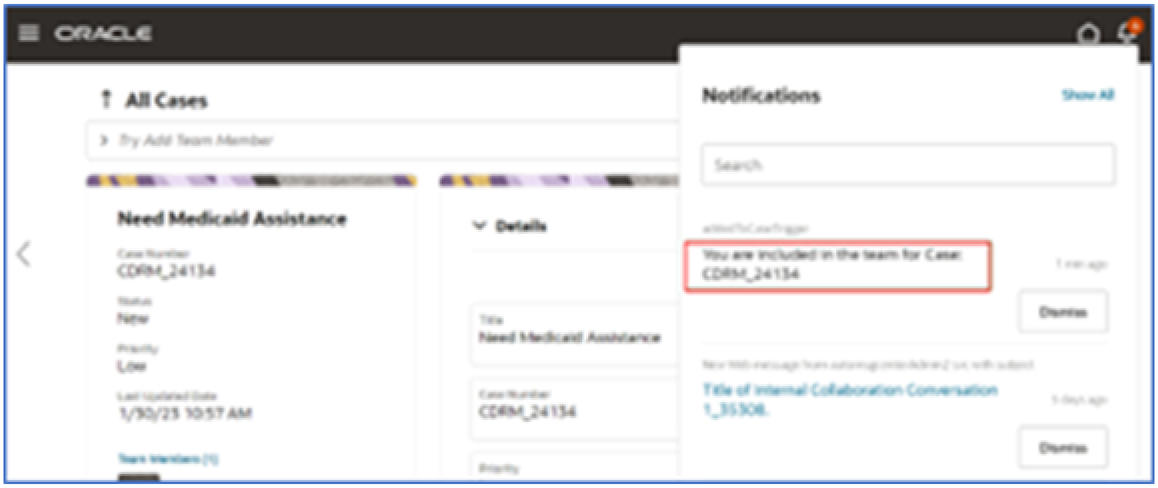
- **Action Plan Automation**: Ask your Oracle contact for sample code.
- **Conditional Data/Folder**: Ask your Oracle contact for a demonstration of an example.

For a video presentation about extending Help Desk, see *Extending Help Desk: Getting Started with Visual Builder* on Customer Connect (sign in required).

Implement Extensions in Application Composer

For a video presentation on using Groovy script see *Extending HR Help Desk Using Groovy Script* on Customer Connect (sign in required).

- Send Notification when a user is added to a Case:



  - Navigator > Sandboxes > Create a Sandbox (with Application Composer enabled)
  - Navigator > Application Composer > Standard Objects > Case > Case Resource > Triggers > Action > Add > Before Insert in Database
  - See the sample code in the next topic.
  - Publish the sandbox.

- Run Queue Assignment rules: Ask your Oracle contact for sample code.

Configure an Email Channel

To send to and receive emails from customers, set up an email channel.

For more details, see the topic *How do I configure an email channel?*

3 FAQs

How do I send notifications when a user is added to a case?

If you want to send a notification when a user is added to a case, you can use this sample code.

Sample code:

```
try {

 println("Preparing data to send notification.");

 def map = new HashMap();

 // Specify default MessageText
 def messageText = "You are included in the team for Case: " + CaseNumber;

 // Specifying the recipient
 def recipientPartyId = PartyId;

 // Resolving Parent child object relation
 def objectCode='CaseVO';
 Long objectId = CaseId;

 // Specify one or more channels
 map.put("Channels",["ORA_SVC_BELL"]);

 map.put("MessageText", messageText);

 // The following can be used to pass a Long PartyId
 map.put("RecipientPartyId", recipientPartyId);
 map.put("ObjectCode", objectCode);
 map.put("ObjectId", objectId);

 if (recipientPartyId) {
 // Call to send notification
 println("Sending notification...");
 adf.util.sendNotification(adf, map);
 println("Notification sent to user id: " + recipientPartyId);
 } else {
 println("No recipient. Notification will not be sent.");
 }
} catch (e) {
 // Log the failure in groovy logging. Logs can be viewed in 'RuntimeMessages'.
 println("Failure to trigger notification from Groovy Script " + e.getMessage());
}
```

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:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Service Assignment Rules
2. On the Manage Service Assignment Rules page, select from the **Category** drop-down list:
   - **Case Queuing Rules**
3. Do one of the following:
   - Create a rule set by clicking the **Plus** icon and specifying the required values.
   - 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?