Oracle Fusion Cloud Applications

How do I get started with Help Desk?

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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.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

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

Thanks for helping us improve our user assistance!

1 How do I get started with Help Desk?

Overview of Help Desk Functionality

Help Desk allows employees within your organization to submit questions and requests or report issues to Human Resources. Providing service to employees through the Help Desk provides a method to track and report upon employee concerns.

2 Review Documentation and Videos

Help Desk Documentation References

Check out these introductory videos and documentation about Help Desk.

Here's an introductory video:

- *Product Update: Help Desk in the Redwood Experience*

Here's some documentation for Help Desk in the Redwood user experience:

- *Implementing Help Desk*
- *Using Help Desk*

Case Management Documentation References

Case Management can support many HR processes which might be initiated through an HR Help Desk or can be used stand-alone. If you're considering using Case Management with HR Help Desk, here's some documentation for your review.

- Join Product Management in this presentation to learn about the benefits of using Case Management for use cases such as Complaints, Employee Relations, Labor Relations, Leave of Absence & Disciplinary Actions and how it differs from an HR Help Desk. *Case Management in Oracle Help Desk*
- This playbook gives you an overview of what you must do, should do, and what's nice to do when you're implementing Case Management. *How do I get started with Oracle Case Management?*

Visual Builder Studio Documentation References

All User Interface (UI) changes are made in Visual Builder Studio (VBS). Unless you're planning to use the default HR Help Desk as it's delivered, you'll need to become familiar with Visual Builder. Here's a list of videos, documentation, and training to consider for using VBS.

Videos

Videos to help you get started with Visual Builder Studio are found on Video Hub:

- *Introduction to Visual Builder Studio for Help Desk*

Documentation

Documentation Resources for setting up and understanding Visual Builder Studio:

- *Administering Visual Builder Studio*
- *Using Visual Builder Studio*
- *Extending Oracle Cloud Applications with Visual Builder Studio*

Presentations

- This presentation will give an overview of the UI tool, Visual Builder, and how to use it for extending the basic functionality to meet your needs: *Extending Help Desk: Getting Started with Visual Builder*
- Also visit the Fusion Service Extensibility channel: *Fusion Service Extensibility - Oracle Video Hub*

Training and Certification

If you're a Learning Subscriber, Oracle University has a Training Series for extending Help Desk:

- *Extend Help Desk Using Visual Builder*

If you're interested in becoming certified, there's also a Visual Builder Certification:

- *Developing Redwood Applications With Visual Builder*

Technical References for HR Help Desk

Here are some technical references for setting up Help Desk including What's New readiness documentation for each release, references for extending Help Desk, and Schema and API documents.

Readiness Documentation and Videos

Documentation that defines “What’s New” in each release can be found on Cloud Readiness site:

- *Oracle Help Desk Cloud What's New*

Videos that go with "What's New" documentation:

- *What’s New for Help Desk in 23B*
- *What’s New for Help Desk in 23C*
- *What’s New for Help Desk in 23D*

References for Extending Help Desk

Here are some resources that you can use as reference for extending the HR Help Desk:

- *Extending HR Help Desk Using Groovy Script*

- *Configuring Applications Using Application Composer*
- *Help Desk - Oracle Video Hub*

Schema and API Documentation

Documents showing Schema and APIs: *Oracle Fusion Service - Development (APIs & Schema)*, specifically:

- *REST API for Sales and Fusion Service in Oracle Fusion Cloud Customer Experience - HR Help Desk Service Requests REST Endpoints*
- *SVC_SERVICE_REQUESTS (oracle.com)* – STRIPE_CD = HRHD

Knowledge Documentation References

If you're not familiar with Knowledge, it's a big part of My Help Self Service, so you might want to review these resources to help your Help Desk implementation.

Documentation on Help Center:

- *Using Knowledge*
- *Implementing Knowledge*

To use Knowledge with the Redwood User Experience, a service must be enabled; here's some information about enabling Knowledge:

Video Hub: Enabling Fusion Knowledge

3 Enable Help Desk in the Redwood Experience

Enable Help Desk in the Redwood Experience

This chapter covers how to enable Help Desk, how to Enable Adaptive Search (Elastic Search), and set the default language.

Required Privileges and Roles

To begin setup, you must be logged in with an account that has the following privileges and/or Roles:

- **Application Implementation Consultant Resource** (ORA_HZ_RESOURCE_ABSTRACT)
- **Next Gen Human Resource Help Desk Administrator** Job Role (ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_NG)
- **Human Resource Help Desk Administrator** Job Role (ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR)
- **HR Service Request Administration** Duty Role (ORA_SVC_HR_SR_ADMINISTRATION)
- **HR Help Desk Administration** Duty Role (ORA_SVC_HELPDESK_ADMINISTRATION)

Enable HR Help Desk

If you haven't already, you need to enable HR Help Desk in the Redwood experience. To do so:

1. Navigate to **Setup and Maintenance**. (If you've the appropriate permissions, it can be found by clicking on the Settings and Actions login icon, or you can find it in the Navigator.)
   - Offering: **Help Desk**
2. Click **Change Feature Opt In**.
3. Select **Enable** for the following rows (minimally):
   - Help Desk
   - Assignment and Routing
   - Email Communication Channel
   - Knowledge Management
   - Action Plans
   - Application Extensions
4. Click the **Edit** (pencil) icon in the Features column of the Help Desk row.
5. Click the **Edit** (pencil) icon in the Enable column.
6. Select **HR Service Requests**.
7. Click **Save and Close**.
8. Click **Done**.
9. Click **Done**.

Enable Adaptive Search (Elastic Search)

To filter the list of Help Desk requests to view, you'll need to enable Adaptive Search (also known as Elastic Search).

1. Navigate to **Setup and Maintenance**.
2. Click the **Tasks** icon.
3. Select **Search**.
4. Enter Configure Adaptive Search in the search field.
5. Click the **Search** icon.
6. Select the **Configure Adaptive Search** task link.
7. Click the **Setup** tab.
8. In the **Service** section, select both **HR Help Desk Contacts** and **HR Help Desk Request**.
9. Select **Partial Publish** from the **Actions** menu.
10. On the Partial Publish window, select **HR Help Desk Request** and **HR Help Desk Contacts**.
11. Click **Proceed with Partial Publish**.
12. Click **Publish**.
13. Click **OK** on the Warning message.
14. Click the **Monitor** tab.
15. Click **Start Process**.
16. Verify the job is in **WAIT** status.

Note: This will take a few hours to run. You might continue with the setup while this is running. It isn't uncommon to get an error. If you do, restart the process from the Monitor Tab for the Configure Adaptive Search page. You can see the nature of the error in the **Publish** tab.

Set Default Language

To avoid errors in processing, a default language must be set. Here's how to set the default language:

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Select **Search**.
4. Enter Manage Knowledge Locales in the search field.
5. Click the **Search** icon.
6. Select the **Default Preferred Knowledge Locale** from the drop-down list.
7. Click **Done**.

4 Setup User Permissions

Setup User Permissions

Here's how to setup user permissions for HR Help Desk.

The following instructions assume that the employees are already added as part of Human Capital Management (HCM).

For more information, see:

- *Overview of Setting Up Users and Security (oracle.com)*
- *Overview of Role-Based Access Control (oracle.com)*

Grant Help Desk Job Roles to Users

Identify the employees and permissions for those employees who interact with Help Desk, and add them as shown in the following table:

Employee	Job Roles	Code
HR Help Desk Agents	Next Gen Human Resources Help Desk Agent, Employee, Resource	ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_NG
Managers of HR Help Desk Agents	Next Gen Human Resources Help Desk Manager, Employee, Resource	ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_NG
Administrators for the HR Help Desk	Next Gen Human Resources Help Desk Administrator, Employee	ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_NG
Employees who will open requests for the HR Help Desk (should be ALL employees)	Next Gen Human Resources Help Desk User, Employee	ORA_SVC_HUMAN_RESOURCE_HELP_DESK_USER
Knowledge Administrator	Knowledge Analyst, Knowledge Manager, Employee	

5 Configure Fundamental Application Data

Set Up Categories

To setup categories for HR Help Desk, navigate to the following:

Setup and Maintenance > Setup: Help Desk > Help Desk Request > All Tasks > Manage Categories for HR Help Desk Requests

6 Setup Visual Builder Studio

Validate the Current Visual Builder Studio Environment

Visual Builder Studio is used for all User Interface (UI) changes in the Redwood Experience and is associated with your TEST environment by default.

If you've more than one non production environment, you might want to confirm which Visual Builder Studio environment is currently configured. To do this:

1. Navigate to Setup and Maintenance.
2. Click the **Tasks** icon.
3. Click **Review Topology**.
4. Click the **Diagnostic Tests** tab.
5. Click **Search** in the **Enterprise Application Configuration** drop-down.
6. Enter Oracle Hybrid% in the search field and click **Search**.
7. Select **Oracle Hybrid Developer Cloud**

> **CAUTION:** Don't click Oracle Hybrid VBCS. That's the cloud service and isn't the same as Visual Builder Studio.

8. Click **OK**.
9. Run **Validate External Enterprise Application Endpoint URL**.
10. This should show which environment the Visual Builder Studio is connected to.
11. Click **Done**.
12. Click **Done**.

Other Considerations for Visual Builder Studio

Important considerations for using VBS for HR Help Desk include:

1. **IMPORTANT NOTE FOR ALL:** You can't deploy changes from a Visual Builder instance into an environment that's on a different version. For instance, when your TEST environment is updated with the latest version of the product, you can't deploy your Visual Builder changes to the Production environment until Production is updated.
2. Oracle recommends doing a P2T on your environment before starting to implement.
3. You'll need Visual Builder to make any changes to your UI – including showing custom fields or attributes to your employees or agents.
4. Visual Builder will only recognize fields or attributes that are on the environment to which it's connected. For this reason, you've a few options:
   a. Do the development on the TEST environment (or whatever environment Visual Builder is associated with as confirmed in the section above).
   b. Re associate Visual Builder Studio to be associated with the environment on which you wish to do the development (not recommended unless you ALWAYS start development in the same alternate environment).

c. Add new custom fields/attributes on both the environment to which your Visual Builder Studio is associated AND on the environment upon which the development will first be done so that VBS development can continue.

Configure Visual Builder Studio

Here's a link to the documentation for setting up and configuring Visual Builder Studio.

See the *Administering Visual Builder Studio* guide.

Change the UI Using Visual Builder Studio

Changing your UI for HR Help Desk using Visual Builder Studio is done by Extensions. To better understand Visual Builder Studio and begin building some simple extensions, you might want to watch the following presentation:

This presentation gives an overview of the UI tool, Visual Builder, and how to use it for extending the basic functionality to meet your needs.

Extending Help Desk: Getting Started with Visual Builder.

7 Configure Optional Application Data

Enable Action Plans for Help Desk

You can associate action plans to help desk requests if you need to complete a series of steps or a sequence of events to resolve the request. Here's how you enable action plans for Help Desk.

Navigate to Setup and Maintenance and go to:

Setup: Help Desk > Action Plans > Manage Action Plan Profile Options > SVC_ENABLE_ACTION_PLAN = Yes

Enable Audit History

To enable Audit History for Help Desk do the following:

1. Go to **Setup and Maintenance**.
2. Click the **Tasks** icon.
3. Select **Search**.
4. Enter Manage Audit Policies in the search field and click **Search**.
5. Select the **Manage Audit Policies** task.
6. On the **Oracle Fusion Applications** line, change **Audit Level** to **Auditing** , then click **Configure Business Object Attribute**.
7. Select **Service** from the Product drop-down list.
8. Select the items you want to audit.
9. Click **Save**.
10. From the Objects Actions menu, select **Synchronize**.
11. Click **Save and Close**.

A video for this feature is found on *Oracle Video Hub*.

Enable Relationships

To Enable **Relationships** (also referred to as Object Links in the Administrator UI):

- Setup and Maintenance > Setup: Help Desk > Action Plans > Action Plan Profile Options
- Edit ORA_SVC_AP_ENABLE_OBJECT_LINK & ORA_SVC_AP_DEFAULT_OBJECT_LINK_TYPE as desired.

For a demo, see:

- *Create Help Desk Relationships - WN 23B - Oracle Video Hub*

Create Queues and Assignment Rules

A queue is grouping where request will be assigned. To create queues and assignment rules for Help Desk do the following:

- **Queues**: Navigator > Create Queue > Settings as appropriate
- (Optional) **Assignment Rules**: See *How do I manage assignment objects and assignment rules for Help Desk?*

Review Reporting

To review reports for Help Desk, navigate to the following:

Reports and Analytics > Browse Catalog > Shared Folders > Service > Embedded Content > all Help Desk subject areas.

See the predefined reports for Fusion Service and HR Help Desk and Internal Help Desk reports here: *Prebuilt Fusion Service Analytics spreadsheet*

Also, see: *Help Desk - HR Service Requests Real Time (oracle.com)*

Configure Notifications

If you want a Bell Notification or Email to be sent in response to a particular event for Help Desk, you'll need to enable notifications.

See *How do I enable notifications?*

First you'll need to Create Groovy Trigger.

- *How You Set Up Groovy Notification Triggers (oracle.com)*.

  Here's a *Sample groovy notification script*.

  The Notification Manager can help to override a particular script when you associate the trigger to the Notification Manager. See one example here:
  - *Notify All Members of a Queue - WN 23C Help Desk - Oracle Video Hub*.

> **Note:**
> - Ensure users don't mask the email IDs as part of notification testing. Such as test+@gmail.com, and so on.
> - In the BPM worklist, Notifications set to All and test email address in the worklist should be blank.

Setup Deep Links or Embed HRHD Link in HCM Pages

To setup deep links or embed the link for Help Desk in HCM pages do the following:

Create through page composer for any Classic non Redwood pages.

For Redwood pages, use Visual Builder Studio.

Give HTML link with parameters to pass to Help Desk.

Setup Slack or Teams Integration

To use third party messaging for agents to collaborate with other subject matter experts, from the conversations UI, you need to configure them.

Slack

Use the following documentation to set up Slack:

- *How You Collaborate with Slack (oracle.com)*
- *Overview of Setting Up a Slack Channel for your Fusion Application*
- *How You Set Up a Slack Channel for Your Fusion Application: Method 2*

For Slack, you must first set up the Slack App and provide the URL for the Fusion Application.

In Fusion, you'll need to Edit the Channel, set up the End Point, Create a Channel for Slack, Authorize, and then use the Job to sync.

Teams

Follow the instructions in the following document for setting up Teams:

- *How You Set Up a Microsoft Teams Channel (oracle.com)*

Configure Oracle Digital Assistant

Oracle Digital Assistant (ODA) is a chat bot that allows employees to create or update help desk requests or search for knowledge.

HCM side documentation for this is found at:

- *Using Oracle Digital Assistant to Interact with HCM*

Only Redwood HR Help Desk customers can activate the Help Desk skill. See the following for more details:

- *Use Chatbot for Help Desk*
- Overview of Configuring Digital Assistant (*YouTube*)
- Configure a Web Channel and Set up a Digital Assistant for the Channel (*YouTube*)

Ready to use ODA can be switched on and used for as-is conversations.

Set Up Omnichannel and Presence

For Help Desk in the Redwood Experience, to use automatic assignment, chat, or CTI you'll need the agents to set themselves as available, and set themselves unavailable when they no longer want to take new requests.

Queues should be constructed on how work should be bucketed.

For example, Product or Category (Spending Accounts, Health Insurance, Retirement Accounts), Geographic (North America, EMEA, APAC), Tiers (Tier 1, Tier 2, Platinum Customers), Skills (Health-related Benefits, Union Grievances, Harassment or Discrimination Accusations).

Queue Management segments incoming requests, and assignment can be done in a few different ways, including:

- Manual queue (where agents can choose from requests within their queue or a manager assigns requests to the agents)
- Automated queues to automatically distribute the work to available agents

Some important terminology:

- Presence = Logged in
- Available = Ready to be sent work

Capacity refers to how many requests a single person can handle at one time.

If agents are getting overwhelmed, they can always set themselves as unavailable. But, individual agent capacities can also be set, as documented at:

- *Oracle Help Desk Cloud 23D What's New*

Note that:

- Agent capacity can be defined per work type.

You can define the Statuses that are counted against capacity.

Set Up Knowledge Management

Knowledge comes with the Help Desk SKU and uses the legacy HCM stripe for all Help Desk.

Information regarding Implementing Knowledge can be found here: *https://docs.oracle.com/en/cloud/saas/fusion-service/farik/index.html*

To use Knowledge with the Redwood User Experience, a service must be enabled; here's some information about the overall experience of enabling it: *https://videohub.oracle.com/media/Enabling+Fusion+Knowledge+with+the+Redwood+User+Experience/1_dd44bstq/294325302*

Set Up Milestones

A milestone is a type of entitlement that identifies service levels your organization has committed to its customers, and is tracked when providing service in the context of a request.

Service Level Agreements (SLAs) or Service Level Targets (SLTs) can be tracked by First Response Time and Resolution Time.

Every 10 minutes, a job runs to adjust the time remaining – expired warning status that changes state and can trigger notifications and such.

For milestone dates to be appear on the Help Desk Request, you need to enable the feature for milestones by doing the following:

1. Navigate to **Setup and Maintenance.**
2. Chose **Help Desk** in the Setup field.
3. On the Service Entitlements functional area, select **Change Feature** Section.
4. Check the '**Manage Service Entitlement Using Subscription Coverages**' feature check box.
5. Click **Done**.

Do you want agents to have the ability to override?

A few notes:

- Edit Coverage: HRHD Standard SLAs
- Different Templates for HR Service Request Subscription "Entitlements"
- Work Schedules for HR HD employees
- Schedule Name
- Exception Name
- Pauses stop-watch when next
- Doesn't integrate with HCM schedules
- Criteria can be set on Severity, and Schedule, Time Zones. Based in Minutes.
- Generally set as global.

Set Up Case Management

If you've a separate group of people who handle extra sensitive HR issues like grievances, harassment investigations, disciplinary actions, or accommodation requests, might want to evaluate using Case Management.

Watch the Web Cast at: *Case Management in Oracle Help Desk*

See: *How do I get started with Case Management?*

And, review the Case Implementation Documentation found at: *https://docs.oracle.com/en/cloud/saas/fusion-service/faicm/index.html*

Set Up Actions and Action Plans

If you've standard processes that should always be followed for particular issues, for example, if there's a set repeatable process for investigating a payroll issue or investigating a grievance, then you should consider setting up Action Plan Templates.

What's the difference between an Action and an Action Plans? An Action can be used for a kind of escalation and is a single action. An Action Plan can contain one or more actions that must be completed in a particular sequence.

If you want to set up an Action to draft Knowledge from an HR Help Desk request, the following will be helpful: *Oracle Help Desk Cloud 23D What's New*

Set Up Personal Signatures

Here's how you configure the ability to have signatures for your agents.

Use the following as a guide:

- *Oracle Help Desk Cloud 23D What's New*
- *Create a Personal Signature - WN 23D - Oracle Video Hub*

Set Up Default Values for Agent Experience

Set the default assignee and null contact for Help Desk agents.

This first Visual Builder extension will help to make agents more efficient.

- *Set Default Assignee and Null Contact in the Help Desk Agent Experience - Oracle Video Hub*

8 Additional Support

More Support for Setting Up Help Desk

If you get stuck, follow the guidelines shown in the following table for getting help or suggesting an improvement.

Scenario	Action	Link
Feature doesn’t work as documented	Open a Service Request	*https://support.oracle.com/*
Desired Functionality isn’t available	Search for the Idea and Vote for it if someone has already proposed it	*Search Results - Cloud Customer Connect (oracle.com)*
Desired Functionality isn’t available and hasn't been proposed	Tell us your idea on Cloud Customer Connect – Be sure to Tag it as ‘HR Help Desk’	*New Idea — Cloud Customer Connect (oracle.com)*
Need some coaching or help with a specific issue	Look for help on Cloud Customer Connect, or contact Technical Support to ask for a Design Review through a CX COE engagement.	*Help Desk — Cloud Customer Connect (oracle.com)* *https://support.oracle.com/*