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Send Us Your Comments

Oracle TeleService Implementation and User Guide, Release 12.2

Part No. E48987-03

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle TeleService Implementation and User Guide.*

This guide is intended for implementers and administrators of Oracle TeleService.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area
- Oracle TeleService
- Oracle Forms

  To learn more about Oracle Forms, read the *Oracle E-Business Suite User's Guide* and the *Oracle E-Business Suite Developer's Guide*.
- Oracle E-Business Suite Framework

  To learn more about the Oracle E-Business Suite Framework, read the *Oracle E-Business Suite Framework Personalization Guide*.
- The Oracle E-Business Suite graphical user interface.

  To learn more about the Oracle E-Business Suite graphical user interface, read the *Oracle E-Business Suite User's Guide*.

About the User Interface Images in This Guide

Many user interface images in this guide do not show the complete page or window. Nor do they necessarily reflect the styles you see in your application. These images are for reference only.

To view the user interface pages and windows in their entirety, please log into the application itself.

How to Use This Guide

The Oracle TeleService Implementation Guide contains the information you need to implement Oracle TeleService. This includes the four modules: the Oracle-Forms based module (which includes the Contact Center and Service Request windows), Customer Support, Service Desk, and Case Management.

> **Note:** Case Management uses the same setups as the rest of the service modules. You must read "case" for every mention of service request throughout this guide and the user interface.

This guide is divided into the following parts:

- Part 1 outlines Oracle TeleService functionality in the "About Oracle TeleService" chapter. This chapter provides an overview of which feature available in which module and feature compatibility between modules.

  The rest of the chapters in this part provide checklists of implementation steps for each module. These checklists specify which of the topics in this guide are relevant to your module and which are required. Use these checklists to guide your implementation.

- Part 2 includes chapters detailing implementation steps relevant to all of the applications in this guide.

- Part 3 includes chapters detailing implementation steps relevant only to the Oracle Forms-based module.

- Part 4 includes chapters of steps common to all HTML-based modules: Customer Support, Service Desk, and Case Management.

- Part 5 includes additional steps relevant to Case Management only.

- Part 6 provides examples of common user procedures for the HTML modules, for Charges, and for using the telephony integration with Oracle telephony applications.

- Appendices include information for all the previous parts.

See Related Information Sources on page xxx for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

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B Frequently Asked Questions About Setting Up Relationship Plans
C Relationship Plans' Predefined Data
D Service Security Predefined Data
E Service Territory Qualifiers
F User Interfaces in Contact Center and Service Request Module

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who have the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated

frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to this Product

Oracle Advanced Inbound Telephony Implementation Guide

Oracle Advanced Inbound Telephony enables telesales and teleservice agents and collectors to route, queue, and distribute callbacks for customer calls received over the phone and the web. It enables computer telephony integration to third-party telephony platforms. You can also transfer or conference a call and its application data from one agent to another.

Oracle Advanced Outbound Telephony Implementation Guide

Oracle Advanced Outbound Telephony provides multiple automated dialing methods and extensive list management controls that improve the penetration and efficiency of outbound calling campaigns and maximize the productivity of interaction center agents. It integrates with Oracle Customer Interaction History to provide feedback that marketing professionals can use to analyze and measure the success of the marketing campaign.

Oracle Common Application Calendar Implementation Guide

This guide describes how to define tasks and note types, set up task statuses and status transition rules, define task priorities, set up data security, and map notes and references to source objects such as a sales lead to Task Manager. In addition, it describes how to create users and run concurrent programs to retrieve new and updated tasks.

Oracle Customer Interaction History Implementation Guide

Oracle Customer Interaction History acts as a central repository for tracking all automated or agent-based customer interactions and interaction wrap ups. A customer interaction is an outcome- oriented timed entity where an agent performs an activity using methods of inbound and outbound communications or media items, each with its own unit of time. Examples of interactions are an agent transferring a call or emailing a marketing brochure, or a customer placing an order.

Oracle Depot Repair Implementation Guide

For Oracle Depot Repair, you must first implement Oracle Contracts, Oracle HRMS, and the main modules of Oracle Financials, Supply Chain Management, and Service for Marketing and Sales. Then, use this guide to set up service activities for a replacement order of spares or a return for repair, service activity billing and install base transaction types, business processes, and labor schedules. This guide also describes how to set up customer profiles, repair types, repair type statuses, service request types, and codes for repair reasons, diagnostics, message actions, and service,

Oracle Email Center Implementation Guide

Oracle Email Center is a comprehensive solution for managing high volumes of inbound email. This guide describes how to set up separate accounts for emails from external and internal sources, create rules for predefined email processing rule types, enter keywords for email intent processing, create tags, and create queries to search for documents and templates in the integrated knowledge base repositories of Marketing Encyclopedia Systems (MES) and Oracle Knowledge Management.

Oracle Field Service Implementation Guide

This guide enables you to install and implement Oracle Spares Management, Oracle Advanced Scheduler, Oracle Inventory, Oracle Order Management, Oracle Service Contracts, Oracle Depot Repair, and Oracle Complex Maintenance, Repair and Overhaul for Preventive Maintenance. Integration with these applications is necessary to automate field service activities. In addition, you define codes to justify material, labor, and expense, define billing types and associate these with service activity codes and inventory items, and define skills and skill levels of field technicians. You can also define time-based and usage-based preventive maintenance programs, and forecast usage rates.

Oracle Inventory User's Guide

This guide enables you to configure the Oracle Inventory structure to best represent your company's inventory sites and business units after you have defined your required ledger and key flexfields. You can also learn about centralized and decentralized inventory structures, and controls and reference options for using and maintaining inventory items such as categories, commodity codes, attributes, statuses, relationships, and picking rules.

Oracle iSupport Implementation and Administration Guide

Oracle iSupport enables service organizations to provide self-service support online to customers, individual users, guest users, and employees. It reduces the number of calls coming into the contact center that require agent assistance. This guide describes how to integrating with Oracle E-Business Suite applications to enable customers review and track orders, payments, shipments, and contracts, manage their service request activity online, and solve problems by searching the knowledge base.

Oracle Knowledge Management Implementation and Administration Guide

Oracle Knowledge Management is an information management system that enables you to create information solutions, submit the solution to an authoring flow for review and edit, and create solution groups for browse and search convenience. This guide describes how you can set up knowledge repositories for a service provider or service requester and control access levels of users to categories, solutions, and to statements within a solution.

Oracle Knowledge Management User's Guide

Oracle Knowledge Management provides solutions that other Oracle applications can search for and use to provide faster and better customer service. This guide describes how customer service agents can manage solutions, statements, authoring flows, customer flows, and solution searches.

Oracle One-to-One Fulfillment Implementation Guide

Oracle One-to-One Fulfillment provides Oracle E-Business Suite applications with a centralized mechanism for compiling and distributing information to customers. E-Business Suite applications use the Oracle One-to-One Fulfillment API to compile the personalized content for the fulfillment request and determine the recipients of this content. The content can be cover letters, collateral, or templates with associated queries.

Oracle Receivables User Guide

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also

includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Scripting Developer's Guide

This guide enables you to understand commands and building blocks in order to customize Oracle Scripting. You can associate commands with action types, questions, panel text, and shortcut buttons. You can set up building blocks for a script or survey to either hard code all of the parameter values for a reusable command, or to interactively prompt the end user to choose the required values from a drop down menu of fulfillment items at runtime. You can also use the panel layout editor of the Script Author to create, edit, and format spoken and instructional text that forms the HTML output content of the script without writing HTML code.

Oracle Scripting Implementation Guide

This guide describes how to create modify, and deploy scripts to the applications database using Script Author. It also describes how to create and modify survey campaigns, cycles, and deployments, how to set up invitations and reminders for the survey campaign, and how to view responses for active or closed survey campaigns. To deploy scripts to applications, you must integrate Oracle Scripting with Oracle TeleSales, Oracle TeleService, Oracle Marketing, and Oracle One-to-One Fulfillment.

Oracle Scripting User Guide

Oracle Scripting provides enterprises with scripts of questions and answers to help agents gather data, provide information to customers, conduct web-based marketing research surveys, and help web customers make a decision. You use the Script Author to build a script for execution, the Scripting Administration console to manage scripting files, the Survey Administration console to administer survey campaigns, and the Scripting Engine to execute scripts.

Oracle Service Contracts Implementation Guide

This guide describes how to define a standard set of templates for various service offerings and modify them to meet your customers' requirements. You can then define the services and subscription items you want to sell, and service availability. You can organize contracts into public and private contract groups and set up automatic renewals, action-based or date-based contract events for condition-based outcomes, and integration with Oracle Contracts, Oracle Installed Base, and Oracle Sales Online. If you transfer ownership of an Oracle Installed Base item with an associated service, you can keep the service with the original owner, terminate the service, or transfer the service to a new owner and create a new contract for it.

Oracle Service Contracts User Guide

Oracle Service Contracts enables you to sell multiple types of services each with its own coverage, service and usage lines, price lists and billing schedules, and payment

methods and warranties. You create contracts for these services, approve them, and manage the entire contract cycle to ensure timely service entitlement checks and minimize service revenue leakage. You can create a contract manually or automatically through Oracle Order Management or by creating a product that has a warranty in Oracle Installed Base.

Oracle Territory Manager Implementation Guide

With Oracle Territory Manager, you can create geographic territories, account territories, and sales territories using predefined matching attributes to identify territories such as the geographic matching attribute of country. You can also create territory hierarchies to make the territory assignments and searches more efficient. Before you implement Oracle Territory Manager, you must define the purpose of defining territories for your business, the level of usage that the resources assigned to territories may require, and the requirement for overlays.

Oracle Trading Community Architecture Administration Guide

This guide enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addition, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

Oracle Trading Community Architecture User Guide

Oracle Trading Community Architecture (TCA) maintains information including relationships about parties, customers, organizations, and locations that belong to your commercial community in the TCA Registry. This guide enables you to use the features and user interfaces provided by TCA and by other Oracle E-Business Suite applications to view, create, and update Registry information. For example, you can import batches of party data in bulk from external source systems into the TCA Registry, merge duplicate parties, sites, and customer accounts, generate time zones for phones and locations, and run various customer reports.

Oracle Universal Work Queue Implementation Guide

Oracle Universal Work Queue supports queued, prioritized distribution and delivery of work, and work methods. It enables agents to access application work from a queue, initiate their real-time session and connect with their assigned media providers. It supplements Oracle Interaction History information to create a complete picture of agents' sessions. This guide describes how to implement Oracle Universal Work Queue and integrate with Oracle E-Business Suite applications.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle E-Business Suite development staff. It describes the UI for the Oracle E-Business Suite products and tells you how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle E-Business Suite Diagnostics User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests in the Oracle E-Business Diagnostics framework.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product and

reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep your product working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Part 1

Overview and Implementation Checklists

This part describes the Oracle TeleService application and provides checklists of implementation steps for all of its modules.

1

About Oracle TeleService

This chapter covers the following topics:

- Oracle TeleService Overview
- Multiple Modules for Different Uses
- Module Compatibility
- Key Integrations

Oracle TeleService Overview

Oracle TeleService automates not just the call center but the whole problem resolution process from the time a customer calls in, sends an e-mail, or enters a service request on the Web. Agents can use Oracle TeleService to update customer records, validate product ownership and contract coverage, provide proactive and personalized customer service, and resolve many problems during the initial contact using a knowledge base.

You can use the application to support a wide variety of customers including businesses, consumers, and internal employees. Social service agencies can use Oracle TeleService to track welfare cases, local governments to resolve citizen complaints, and investigative agencies to conduct investigations.

Customer Management Features

The customer management features make it possible for agents to:

- Receive screen pops with relevant customer, product, and service request information when a customer calls.
- Quickly display customer information by entering unique customer identifiers (service keys) such as product serial numbers.
- View key customer information on a dashboard and drill down to the details.

- Receive automatic alerts or guidance through scripts when customers meet criteria you specify (Relationship Plans).
- Manage customer criticality.

Work Related Features

The work related features speed up handling and resolution of customer inquiries. They make it possible for agents to:

- Handle customer inquiries through multiple channels including inbound telephony, Oracle iSupport self-service Web portal, e-mail, Web conferences, and call back requests.
- Resolve customer problems by searching the organization's knowledge base.
- Manually or automatically assign the service request to the group or the person most appropriate to handle it.
- View details of customer products in the install base.
- Keep customer contacts and agents informed about a service request through automatic notifications.
- Make related documents available for other agents working on the service request at the click of a mouse.
- Check contracts, apply entitlements, and have the application automatically track resolution times to ensure your organization meets its contractual obligations.
- Create, assign, and schedule tasks required to resolve the problem.
- Keep customer contacts and other members of the team informed through automatic notifications.
- Send and receive customer e-mails in context of the service request.
- Automatically open the next service request that should be worked on with the click of a button.
- Automatically submit service requests for approval.
- Collaborate with customers over the Web.
- Generate reports of service request content that can be configured, via Oracle XML Publisher.

- Manage returns and service billing.

Multiple Modules for Different Uses

Oracle TeleService is divided into four main application modules intended for different types of users:

- Service Request and Contact Center
- Customer Support
- Service Desk
- Case Management

The Service Request and Contact Center module of the Oracle TeleService encompasses the widest range of features of all the modules. Its robust technology and integration with inbound telephony and Oracle Order Management for processing service charges makes this module ideal for high-volume call centers.

The last three modules, Customer Support, Service Desk, and Case Management provide superior performance over slower remote connections and can be personalized extensively to increase efficiency of both specialists and occasional users.

Customer Support, Service Desk, and Case Management are targeted at remote users, technicians, and call centers where telephony integration is not required.

About the Service Request and Contact Center Module

The Oracle Service Request and Contact Center module of Oracle TeleService is composed of two main user interfaces targeted at different users:

- Contact Center Window, page 1-3
- Service Request Window, page 1-4

The two interfaces are integrated, so users can easily switch between them with the click of a button.

About the Contact Center Window

The Contact Center window is designed to enable Tier-1 customer service agents in high volume call centers to manage customer information and quickly enter service requests.

It provides the central place to view and update customer information that has been collected by the entire Oracle E-Business Suite of applications.

Agents can access not only addresses and contacts but also a record of all past

interactions your organization has had with a customer, including e-mails, phone calls, and site visits. Agents can read notes posted by the entire organization about a customer and know which products the customer has purchased, their service history, and any contractual agreements that apply.

Putting all the information about customers at agents' fingertips not only speeds up issue resolution but also eliminates the need for customers to repeat the same information over and over again as their problem gets passed through your organization.

About the Service Request Window

The Service Request window optimized the resolution of service requests. It permits Tier-2 customer support agents to manage and resolve requests for service from the time the customer contacts the organization or logs a service request on the Web until the problem is resolved.

The Service Request window includes the Charges tab, which permits agents to charge for service and manage returns.

About the Customer Support Module

Customer Support is a HTML module of Oracle TeleService. It enables support specialists to effectively create, manage, and resolve customer issues.

Its key benefits include:

- An efficient dashboard and work list enabling users to prioritize work, search knowledge, analyze service history and resolve issues.

- Improved service effectiveness by providing business rules and flows that can be configured to standardize issue resolution.

About the Service Desk Module

Used in conjunction with Oracle iSupport, Service Desk offers a comprehensive employee help desk solution that improves the effectiveness and quality of internal support operations. The user interface optimizes the presentation of service information and its business flow-based design enables efficient processing of Service Desk requests. Built to support industry standards such as ITIL (IT Infrastructure Library), the Service Desk facilitates best practices for key areas of service management, including incident, problem, change and configuration management.

The Service Desk module provides:

- Consolidated support of key business functions including IT, human resources, and facilities.

- Improved productivity by enabling agents to efficiently determine which issues and

requests to work on next, configuring the user interface to meet the exact needs of the service desk user, and automating business processes to resolve issues quickly.

- Enhanced quality of employee service by ensuring best practices across departments, and enabling efficient self-service channels.

About the Case Management Module

Case Management is targeted to meet the needs of law enforcement agencies, human and social services organizations, and claims and benefits departments.

This application uses the same service application infrastructure and setups as the other HTML modules, but personalized to handle cases.

In addition, Case Management facilitates the capture and track information on parties involved in a case such as suspects, witnesses, case administrators, social workers and others. Integrated with a robust set of tools, Case Management facilitates interdepartmental case handling, knowledge sharing and promotes accountability.

Its key benefits include:

- An industry standard and commercially available solution targeting the needs of law enforcement agencies, human and social services organizations, and claims and benefits departments.

- Ability to create, search, track, and manage complex cases.

- Agency security and accountability by controlling access to cases and provides a comprehensive audit capability.

Module Compatibility

Because Oracle TeleService' modules are targeted at different users, they expose different features of the application.

The tables in this section highlight the differences between the way features are exposed in the different modules and in Oracle iSupport. The tables include separate entries for the Contact Center and Service Request windows, the two main Oracle-Forms interfaces. Oracle iSupport is included because this application provides the self-service solution for Oracle TeleService.

These tables can help you decide which module to implement and which features work across modules if you decide to mix and match.

For example, if you are implementing a call center with telephony integration, you will want to implement the Service Request and Contact Center module because of its integration with inbound telephony and IVR.

For the details about the features you can implement for each module see the

implementation checklist provided in a separate chapter.

A "Y" entry in a table cell means the feature is fully supported by the module; "P" signifies the features is partially supported; and "N" indicates that it is not supported or not applicable. Footnotes at the end of the tables give further details.

Customer Management Features

The following table highlights features related to customer management and their availability in the different Oracle TeleService modules:

The table heading uses abbreviated module and product names:

- Contact Center window (Oracle Forms): C. C. Win.
- Service Request window (Oracle Forms): S.R. Win.
- Customer Support: Cust. Sup.
- Service Desk: S. Desk
- Case Management: Case
- Oracle iSupport: iSupp.

Feature	C.C. Win.	S. R. Win.	Cust. Supp.	S. Desk	Case	iSupp.
Receive screen pops with relevant customer information	Y	Y	N	N	N	N
Quickly display customer information using unique identifiers	Y	Y	Y	Y	Y	N(1)
Automatic alerts and scripts on customer status (Relationship Plans)	Y	Y	P(2)	P(2)	P(2)	N
Customer overviews through the Dashboard	Y	N	N	N	N	N
Manage customer criticality	Y	N	N	N	N	N
View key customer information in Customer Profiles	Y	Y	N	N	N	N

Feature	C.C. Win.	S. R. Win.	Cust. Supp.	S. Desk	Case	iSupp.
Create and update party records	Y	Y	Y	Y	Y	N(3)

Notes:

- (1): Oracle iSupport identifies customers when they log in.
- (2): The HTML-based modules displays alerts to agents but do not provide scripting functionality.
- (3): In Oracle iSupport, customers can update party information such as contact points and addresses but cannot create parties.

Work Related Features

The following table highlights the differences between the different ways the modules expose service request and task features and information.

The table heading uses abbreviated module and product names:

- Contact Center window (Oracle Forms): C. C. Win.
- Service Request window (Oracle Forms): S.R. Win.
- Customer Support: Cust. Sup.
- Service Desk: S. Desk
- Case Management: Case
- Oracle iSupport: iSupp.

Feature	C.C. Win.	S.R. Win.	Cust.Sup.	S. Desk	Case	iSupp.
Automatic work assignment	Y	Y	Y	Y	Y	Y
Assign work assisted by the Assignment Manager	P(1)	Y	N	N	N	N
Associated parties in service requests	N	N	N	N	Y	N

Feature	C.C. Win.	S.R. Win.	Cust.Sup.	S. Desk	Case	iSupp.
Automatic closure of service requests and tasks	Y	Y	Y	Y	Y	Y
Automatic notifications	Y	Y	Y	Y	Y	Y
Automatic task generation	Y	Y	Y	Y	Y	Y
Capture additional service request attributes through questions and answers (Contact Center)	Y	N	N	N	N	Y
Capture additional service request attributes (Extensible Attributes)	N	N	Y	Y	Y	N
Capture information about associated parties	N	N	N	N	Y	N
Electronic approvals and records (Oracle eRecords)	N	Y	Y	Y	Y	Y
Check for duplicate service requests	Y(2)	Y	N	N	N	Y(3)
E-mails in the context of service requests (Oracle E-mail Center)	Y	Y	Y	Y	Y	N
Enter service requests against internal assets (Oracle Enterprise Asset Management)	N	Y	Y	Y	Y	Y
Entitlements from service contracts (Oracle Service Contracts)	Y	Y	Y	Y	Y	Y
Escalate service requests (Escalation Manager)	Y	Y	P(4)	P(4)	P(4)	P(5)

Feature	C.C. Win.	S.R. Win.	Cust.Sup.	S. Desk	Case	iSupp.
Handle customer inquiries through multiple channels	Y	Y	P(8)	P(8)	N	N/A
Integration with Oracle Complex Maintenance, Repair, and Overhaul	N	Y	N	N	N	N
Key agent performance indicators	N	N	Y	Y	Y	N
Knowledge searches (Knowledge Management)	Y	Y	Y	Y	Y	Y
Link service requests	N	Y	Y	Y	Y	N
Oracle Install Base integration	Y	Y	Y	Y	Y	Y
Resolve customer problems through knowledge base searches	Y	Y	Y	Y	Y	Y
Schedule Field Service tasks (Advanced Scheduler)	N	Y	N	N	N	N
Service request attachments	Y	Y	Y	Y	Y	Y
Service request reports (Oracle XML Publisher)	N	Y	Y	Y	Y	N
Submit service charges to Oracle Order Management	N	Y	N	N	N	P(6)
View and create orders in Order Management	Y	P(7)	N	N	N	N
Web collaboration (Oracle Collaboration Suite)	Y	Y	Y	Y	Y	Y

Notes:

- (1): You can use the Assignment Manager in the Contact Center to assist you with service request assignment only, not with task assignment.

- (2): The Contact Center checks for duplicate service requests when the service request is saved, not when data are entered. The Service Request window checks for duplicates both on data entry and on save.
- (3): The application checks for duplicates among the service requests logged in Oracle iSupport when an agent first displays the Oracle iSupport service request either in the Service Request or Contact Center windows.
- (4): Users of the HTML modules can see on the Agent Dashboard if a service request has been escalated, but the escalations themselves must be created and viewed in Oracle Forms.
- (5): Self-service users can escalate their service requests through Oracle iSupport.
- (6): Oracle iSupport exposes actual and estimated charges.
- (7): Charges permits the creation of orders in Oracle Order Management.
- (8): Customer Support and Service Desk are not telephony enabled and so do not handle phone or Web callback enquiries.

Other Features

The table in this section covers those features that are not easily classifiable as specifically customer- or work related.

The table heading uses abbreviated module and product names:

- Contact Center window (Oracle Forms): C. C. Win.
- Service Request window (Oracle Forms): S.R. Win.
- Customer Support: Cust. Sup.
- Service Desk: S. Desk
- Case Management: Case
- Oracle iSupport: iSupp.

Feature	C.C. Win.	S.R. Win.	Cust. Supp.	S. Desk	Case	iSupp.
Descriptive Flexfields	Y	Y	Y(1)	Y(1)	Y(1)	Y(2)

Feature	C.C. Win.	S.R. Win.	Cust. Supp.	S. Desk	Case	iSupp.
Enter data into quality plans (Oracle Quality)	Y	Y	N	N	N	N
Global address format and validation	Y	Y	P(3)	P(3)	P(3)	N
Guided customer interaction (Oracle Scripting)	Y	Y	N	N	N	N
Multiple time zone support	Y	Y	P(4)	P(4)	P(4)	Y
Notes	Y	Y	Y	Y	Y	Y
Personalize the interface via Oracle Forms Personalization and Folders	Y	Y	N	N	N	N
Personalize the interface via the Oracle Applications Personalization Framework	N	N	Y	Y	Y	N
Security	Y	Y	Y	Y	Y	Y

Notes:

- (1): The HTML-based modules do not support context-sensitive descriptive flex fields.
- (2): Oracle iSupport supports only external descriptive flexfields. It does not support context-sensitive flexfields.
- (3): In the HTML-based modules you can view addresses in global address formats, but you can only create new addresses in the U.S. address format.)
- (4): Agents cannot dynamically switch between different time zones to display dates and times.

Key Integrations

The level of functionality agents receive from Oracle TeleService depends on implementation of different components of the Oracle E-Business Suite. This section

explains the functionality added by:

- Common application components, page 1-12
- Service suite foundation, page 1-13
- Key integrated applications, page 1-14

Common Application Components

Oracle TeleService makes use of common Oracle E-Business Suite application modules. Key functionality is delivered by:

- Oracle Universal Work Queue (UWQ): This is where agents obtain their work assignments, including service requests, tasks, and Web callbacks. The UWQ also provides the interface for handling calls. Agents receive inbound calls via their icWork Controller (Softphone) by logging into a work queue.
- Assignment Manager: Provides agents with the ability to assign resources to a task or a service request based on service territories, qualification, availability, and geographic location.
- Resource Manager: This module stores the skill levels of your organization's field technicians and agents. Agents use this information to assign the right technician for the job either manually or automatically.
- Notes: This module makes it possible for all employees of the company to share notes on customer and customer issues and to communicate with customers through the Oracle iSupport Web portal.
- Task Manager: The task manager makes it possible to assign, reassign, and prioritize tasks needed to deliver service to the customer. Assigned tasks appear as work items in the assignee work queues. Tasks can also be synchronized with Microsoft Outlook and Palm devices through functionality provided by this module.

  Note: Agents must manage their tasks from Oracle TeleService as the Task Manager cannot be used for updating service request tasks as this interface is read only.

- Territory Manager: Your organization can use the territory manager to set up service territories that the service suite uses to automatically assign tasks and service requests to employees based on their skill, geographical location, and other criteria. Your organizations can have the assignment done automatically or via a concurrent program.

- Escalation Management and Business Rule Monitor: Using Escalation Management and the Business Rule Monitor agents can re-prioritize, reassign, and monitor a situation to a satisfactory completion. Both applications are modules of the application foundation and part of the Oracle Common Application Calendar.

- Oracle One to One Fulfillment: This module makes it possible for you to e-mail or fax copies of service requests to customers.

Service Suite Foundation

Three applications provide key functionality for Oracle TeleService and form the foundation for all service suite applications:

- Oracle Knowledge Management

- Oracle Install Base

- Oracle Asset Tracking

Oracle Knowledge Management

The integration with Oracle Knowledge Management makes it possible for agents using Oracle TeleService to search for solutions to customer problems.

Oracle bundles knowledge management tools with all service suite applications. The tools make it possible for your organization to build and maintain an enterprise-wide repository of knowledge ranging from office procedures to technical troubleshooting solutions. Your organization can develop solution templates in a wide variety of formats from simple questions and answers to product bulletins, FAQs, troubleshooting guides, and product documentation. The organization can make different knowledge management solutions available to different audiences: to call center agents, field technicians, and customers logging in on the Web portal.

Oracle Install Base and Oracle Asset Tracking

Integration with the install base applications makes it possible for Oracle TeleService agents to log service requests against items owned by either customers or employees.

Oracle Asset Tracking tracks the internal assets of an organization. Oracle Install Base tracks customer assets. Both products center on a repository of product data recording the location, configuration, status, ownership, account(s), change history, and party relationship(s) for products, software licenses, and other assets.

The repository tracks an asset from the time it is received in inventory, in WIP (Work in Process), in projects, at the customer site, or in for repair. Cradle-to-grave tracking follows the asset as it passes through the various divisions of a company (inventory, purchasing, orders, shipping, and service).

An instance record describes the set of parts constituting a specific physical unit.

Knowing the exact composition of the product to be serviced enables the service provider to ensure that the needed parts are available before dispatching a technician; makes it unnecessary for the support agent to ask customers questions about the product's makeup; and makes it possible for an in-house repair center to have a customer ship back to the service center only those parts needed for the repair.

The install base instance record is the foundation for after-market service, including regularly scheduled maintenance tasks and unplanned maintenance, and it tracks contract and warranty entitlements for the asset it represents. The organization can track the usage of a product or service via the Counters module. For example, a copying machine service company can use counters to record the number of copies made by a particular machine and bill customers based on usage. Usage data can trigger service business processes such as the scheduling of preventive maintenance or overhauls; the renegotiating of service, rental, and leasing contracts; the reordering or shipping parts; and for calculating product reliability.

Key Integrations with Other E-Business Suite Applications

Because Oracle TeleService is fully integrated with the Oracle E-Business Suite each additional application you implement provides additional functionality for your service organization. To get the most out of Oracle TeleService your organization must implement at least the applications listed in this section.

Oracle iSupport

Self-service Web portals built with Oracle iSupport make it possible for customers and employees to log and monitor their service requests. Oracle TeleService agents can publish service requests for the customers to view, suggest knowledge base solutions, and communicate with customers through notes.

Oracle iSupport provides a secure self-service Web portal your customers can use to get immediate help 24 hours a day, seven days a week from anywhere in the world. Your customers can come online to view the status of their orders with your company, review service agreements, update their contact information, and more. Online they can find answers to many of their questions on their own by searching a knowledge base or by participating in online forums. If they need assistance, customers create service requests and monitor their resolution. Integration with Oracle TeleService makes it possible for an agent to step in and help any customers that cannot resolve problems on their own. Your organization can extend the customer support benefits to your employees by deploying Oracle iSupport as a self-service help desk.

Oracle Field Service

Oracle TeleService agents can review and submit for billing the charges entered by field service technicians using Oracle Field Service.

Oracle Field Service automates the process of dispatching field technicians. The application's Dispatch Center provides a central point from which dispatchers can

monitor and control the prioritizing, scheduling, and dispatching of field activities. It combines a graphical overview of planned activities for technicians with a calendar or Gantt view, and it uses maps to show technicians' current locations. A dispatcher can change a resource assignment directly on the Gantt chart simply by dragging and dropping a task symbol from one technician to another. Dispatchers can also access statistical overviews of their organizations to assess representatives' performances.

An escalation process alerts dispatchers when an agreed response-time threshold is exceeded. Automated processes guided by customer-specific escalations and tracking help to ensure progress on each task, enabling call takers, dispatchers, and managers to focus on exceptions.

Building on core functionality found in Oracle Inventory, the application's spares management functionality provides the additional logistics and planning features required to effectively manage a field service parts inventory. Using the spares management, a field service organization can automate and streamline all aspects of managing spare parts inventory in the field including ordering, tracking, forecasting and creating reports to name just a few. Oracle Inventory is the only prerequisite product specifically required for implementation of spares management. Oracle Inventory provides the core foundation functionality for the item master, stocking locations, inventory balance tracking, and so on.

Oracle Service Contracts

Oracle Service Contracts automatically applies the terms of a contract to the service request agents are working on and ensures that your service organization meet its contractual obligations.

This application makes it possible for agents and technicians providing customer support, field service, or in-house repair service, to review both warranty and service contract details with a customer. Contract details available may include coverage schedules, response and resolution times by severity, preferred and excluded resources, billing rates for labor, relevant discount provisions, and expenses for each type of service on offer.

Oracle Service Contracts not only makes the provisions available for review, but it supports the billing process by pushing, labor, materials, and expenses incurred to TeleService's Charges module, which consolidates the information into a single charge with multiple lines. Before the customer is charged, Service Contracts guides the application of customer entitlements to the charges so that discounts and labor rates are applied accurately in calculating the final charge.

Oracle Advanced Inbound and Outbound

Oracle Advanced Inbound makes it possible for Oracle TeleService to assign a call to an agent most qualified and available to handle the call and to display information about a caller.

Oracle Advanced Inbound is designed to channel a customer call to the right call-center agent simultaneously reducing expenses and increasing customer satisfaction.

Oracle Advanced Inbound offers Web integration, connectivity to the most popular Integrated Voice Response (IVR) equipment, intelligent routing, screen pops, virtual interaction center, and VoIP support. Oracle Advanced Inbound's easy-to-use rules engine weighs agent skills as well as business rules and data to make complex routing decisions. Oracle Advanced Inbound provides Oracle TeleSales, Oracle TeleService, and Oracle E-Commerce and Oracle Interaction Center applications with screen-pop support that spans all channels-telephony/IVR, e-mail (in Oracle Email Center), and the Web (in Oracle iStore and Oracle iSupport).

Oracle Advanced Outbound makes it possible for agents to place outgoing calls.

Oracle Email Center

The Oracle Email Center provides Oracle TeleService with the ability to receive and send e-mails. Templates that automatically fill in relevant information about the service request are provided by the Oracle TeleService administrator.

Oracle Email Center helps businesses manage increasing volumes of e-mail through the use of automated analyses and automatic responses to standard or routine e-mail. Oracle Email Center offers the ability to analyze the body of the e-mail and its attachments and provide suggested responses for interaction center agents. It matches the general themes of e-mails against a knowledge base of appropriately managed answers (either from previously used responses or responses that are continually updated). The best suggested response could be used to automatically respond to the sender, thereby eliminating the need for agent contact. When an automated response is not appropriate, Oracle Email Center and Oracle TeleService can route the e-mail to an agent and display a screen pop with customer information. The user interface for Oracle Email Center contains suggested responses that an e-mail agent can use to respond to the issues in the original e-mail.

Oracle TeleService integrates with Oracle Email Center to make it possible for you to compose an e-mail with the click of the mouse. Depending on where you launch the Oracle Email Center's Compose window, the application automatically fills in the addressees and context about the service request that you are writing about.

The e-mails you send are recorded in Oracle E-Business Suite's Interaction History. This makes it possible for you to review any e-mails sent to a customer about a service request directly from the Service Request window or you can use the extensive full-text search capabilities of the Oracle Email Center itself to find the e-mail you are looking for.

Oracle Scripting

Oracle Scripting makes it possible for your organization to author scripts that can guide agents through customer interactions.

Oracle Scripting provides call guides, or scripts, for interaction center agents. When agents use Oracle TeleService, scripts guide them through the call flow needed as they interact with the customer. A script leads an agent through appropriate sales and/or troubleshooting queries, prompts for cross-sell and up-sell opportunities at the right

time within the context of the call, and provides detailed information to help the agent resolve customer questions. Scripts also help reduce training time in the high turnover interaction center industry, because they provide simple navigation through complex customer interactions.

Oracle Scripting also includes iSurvey, a module designed to support the collection of data through Web-based surveys.

Oracle Advanced Scheduler

The Oracle Advanced Scheduler, an optional module for Oracle Field Service, makes it possible for agents to schedule field service tasks directly from the Oracle TeleService user interface. For further information refer to the *Oracle Advanced Scheduler User Guide.*

Oracle Depot Repair

Oracle Depot Repair automates and streamlines the in house repair process providing enterprises with the flexibility to manage multiple types of returns so that a customer does not lose valuable work time while an item is being repaired. It enables repair centers to manage the entire life cycle of repairs including the creation and tracking of repair orders, generation of Return Material Authorizations (RMAs), assignment of repair work orders to the appropriate technicians, capturing/processing the repair activity, shipping repaired/refurbished products to their respective destinations, and then invoicing the customer for the work delivered based on contractual entitlements.

Oracle Order Management

Using Oracle Order Management, an agent can book the order placed through Oracle TeleService and bill the customer for services.

Oracle Order Management provides a complete order to cash solution and enables global order promising integrated to shipment execution.

Oracle Quality

Your organization can set up collection plans in Oracle Quality that capture relevant data as service requests are logged by customer support personnel. Collection plans may capture data related to a customer, product, and product line. Your organization can then analyze this data in Oracle Quality to answer questions about common problems faced by users, or products which cause the most problems. The captured data can be exported to perform detailed statistical analyses.

Oracle Enterprise Asset Management

Agents can create service requests for work orders of internal assets tracked in Oracle Enterprise Asset Management (eAM).

Oracle eAM specializes in maintaining internal assets using a preventive maintenance schedule.

Oracle Advanced Collections

Oracle Advanced Collections makes it possible for agents to manage invoices and payments for customer accounts from the Contact Center.

Oracle Advanced Collections enables payments or promises to pay, and can be used to resolve delinquency issues at the customer, account, bill-to, or transaction level.

Oracle TeleSales

Oracle Telesales makes it possible for agents to send physical or electronic collateral to customers from the Contact Center.

Oracle TeleSales manages the entire sales cycle, from marketing to booking orders.

Oracle Approvals Management and Oracle E-Records

In Oracle TeleService you can implement the capture of electronic audit records (e-records) and electronic approvals (e-signatures) via integration with Oracle Approvals Management (for approval rules) and Oracle E-Records (for e-record content setup). Whenever an agent sets a service request (case) to a special status, the application captures the e-record and sends out any approval requests via the Oracle Workflow notification process.

Oracle XML Publisher

Oracle TeleService uses Oracle XML Publisher to produce service request and case reports in HTML, PDF, RTF, and XSL formats.

Oracle Approvals Management

You can use Oracle Approvals Management to set up an approvals process for service requests and cases.

Oracle E-Records

Oracle TeleService uses Oracle E-Records to capture electronic records of service requests and cases.

Oracle Complex Maintenance, Repair, and Overhaul

Users of Oracle Complex Maintenance, Repair, and Overhaul can use Oracle TeleService to log service requests against work orders.

Oracle Cost Management

Oracle TeleService integrates with Oracle Cost Management to retrieve the unit cost of an item captured in the debrief or charge line. Cost information is captured for all debriefed material, labor, and expenses, and for manually created charge lines. With

this information customers can generate a report to review cost, charges, and profit margin for individual service requests.

Oracle Projects

Oracle TeleService integrates with Oracle Projects to track costs for service tasks executed for a particular project and project task, such as installing a cell tower, or overhauling a wind turbine. Costs generated from these tasks can be posted into Oracle Projects to report and account for the project.

2

Service Request and Contact Center Module Implementation Checklist

This chapter covers the following topics:

- Setups in Integrated Applications
- Implementation Tasks for the Service Request and Contact Center Module

Setups in Integrated Applications

This section provides guidelines for implementing integrated applications that are required to make your application work properly. References are provided to sections of this guide with additional setup details.

- Oracle Order Management Setups

  If you are using charges, you must set up Oracle Order Management Transaction Types. Although this is the only direct dependency, you must fully configure Oracle Order Management to process orders submitted through charges.

- Oracle Inventory Setups

  You should be aware of the Oracle Inventory setups listed in the table below:

What to Set Up	Comments
For items, select "Enabled" in the Service Request list on the Service tab of the Master Item window.	To be able to create a service request against an inventory item, you must select "Enabled" in the Service Request list on the Service tab of the Master Item window.

What to Set Up	Comments
To enable Charges for labor, material, and expense items, you must select "Enable Service Billing" and choose a billing type.	You must select a billing type for Charges. For details about Charges setups, see Setting Up Items in Oracle Inventory, page 12-20.
• Category Sets • Category Codes • Item Category Assignments	Required only for restricting items on the service request based on item categories. Oracle Inventory provides the capability of maintaining multiple categorizations (category sets) for different uses. Most service implementations (especially manufacturing companies) can reuse an existing item category set defined for other applications rather than maintain a different item categorization for service.
To capture costs you need to enable the following attributes for the item. • Costing Enabled: This check box must be selected to report item costs in Cost Management. • Inventory Asset Value: If this check box is selected, then the item is valued as an asset in inventory. Else, it is valued as an expense item.	• If the item is defined as an inventory asset item, then the Costing Enabled check box is always enabled. • If it is an expense item, you can choose to track or not track costs in Cost Management. However, for the Service Applications, if your item is setup as an expense item, then the cost is not captured for the service transactions.

- Oracle Install Base Setups

  The following table list implementation setups for Oracle Install Base:

What to Set Up	Comments
Instance statuses must be marked as "Request Allowed".	You can log service requests only against instances in a status with "Request Allowed".
Transaction types and subtypes	To enable charges you must set up type and subtypes according to the procedures described in Setting Up Charges for Items Tracked by Install Base, page 32-1.

- Oracle Service Contracts Setups

  You must set up Oracle Service Contracts to enable entitlements search and displaying the default contractual due dates.

  Even if you do not use Oracle Service Contracts, you must still set up a default service level agreement to enable display of the default due dates on tasks and service request actions. See Setting Up Default Response and Resolution Times, page 7-34

- Resource Manager Setups

  The following table list implementation prerequisites for Resource Manager, a module of the Trading Community Architecture (TCA):

What to Set Up	Comments
Resources	In order to assign ownership of service requests to an agent, the agent must be set up as a resource. This step is required.
Resource Groups	In order to assign ownership of service requests to a group, the resource group must be associated with the usage of "Support". This step is required if you are assigning service requests to groups.

- Oracle Common Application Calendar Setups

  You should be aware of the setups described in the following table. For details see the *Oracle Common Application Calendar Implementation Guide*:

What to Set Up	Comments
Escalation Manager	You must set up basic Escalation Manager capabilities and lookup codes to be able to escalate service requests in Oracle TeleService.
Business Rule Monitor's Business Rules	You must set up business rules that automatically escalate service requests that meet your criteria.

What to Set Up	Comments
Note types and mappings	Required to manage notes associated with service requests. See Setting Up New Note Types for Service Requests and Tasks, page 7-36.
Task types and mappings	Required to use tasks in service requests. See Defining Task Types, page 41-5 and Setting Up Task Types and Priorities for Service Request Tasks, page 7-35.
Task statuses and transition rules	Required to use tasks in service requests.
Task templates	Required to automatically generate tasks for service requests.

- Oracle Territory Manager Setups

  You must enable the matching attributes you want to use for your service territories. These are listed in the Guidelines for Setting Up Service Territories , page 16-27in this guide.

- Oracle Knowledge Management Setups

  To enable knowledge management searches in Oracle TeleService, implement the application according to the steps outlined in the *Oracle Knowledge Management Implementation and Administration Guide.*

- Oracle Enterprise Asset Management Setups

  Implement as per *Oracle Enterprise Asset Management Implementation Guide*. In addition, you must also perform the steps detailed in Enabling Integration with Oracle Enterprise Asset Management, page 7-38.

- Oracle Quality Setups

  No additional setups required. Implement as per *Oracle Quality Implementation Guide*.

- Oracle Depot Repair Setups

  No additional setups required. Implement as per *Oracle Depot Repair Implementation Guide*.

- Oracle Advanced Inbound Setups

  Can be used to enable telephony in the Contact Center and the Service Request

window. You must implement this application together with the Oracle Universal Work Queue. See Enabling Telephony, page 38-1.

- Oracle Advanced Scheduler Setups

  Optional for use with the Contact Center. Implement according to*Oracle Field Service Implementation Guide*.

- Oracle Scripting Setups

  Optional for use with Relationship Plans. You must create scripts and implement scripting according to the procedures described in *Oracle Scripting Developer's Guide*, *Oracle Scripting Implementation Guide*, and the *Oracle Scripting User Guide*. For details on how to enable scripts for use with the Contact Center, see Enabling Oracle Scripting , page 37-6.

- Oracle Advanced Collections Setups

  Optional for use with the Contact Center where agents can view collections information from the Invoices tab. Implement as per *Oracle Advanced Collections Implementation Guide*. For additional information see Setting Up the Invoices Tab, page 34-12.

- Oracle Field Service Setups

  Optional. Implement as per *Oracle Field Service Implementation Guide*.

- Oracle Cost Management Setups

  To enable service costing you must setup the costing method and item cost.

What to setup	Comments
Costing Method	Service applications support the four costing methods for material items - Standard Costing, Average Costing, FIFO Costing, and LIFO Costing. For labor and expense items only Standard Costing can be applied, as they are not received into inventory.
Item Cost	You must define Item, Cost Type, Cost Element, Cost Sub Element, Basis and Rate or Amount.

Implementation Tasks for the Service Request and Contact Center Module

This section provides you with a checklist of implementation steps for the Service Request and Contact Center module of Oracle TeleService. Use this checklist to determine which chapters and sections of this implementation guide are relevant to you.

The steps are listed in suggested implementation order. Not all steps depend on previous steps, but many do.

Follow the references to detailed information and procedures in this and other guides.

Implementation Step	Description	References
Set up resources.	You must set up agents as resources using Assignment Manager before you can assign ownership of service requests to them. You must set up resource groups with the usage of "Support" to assign service requests to groups.	• Process for Setting Up Oracle TeleService Resources, page 6-1 • Resource Manager section of the *Oracle Trading Community Architecture Administration Guide*
Set up business processes.	You must set up business processes to enable the defaulting of response and resolution times from the default service level agreement and to use service charges and Oracle Service Contracts. A business process provides a general classification of the work performed. Examples include depot repair, field service, and customer support.	• Setting Up Business Processes, page 7-1 • Setting Up Business Processes, Service Activities, and Billing Types for Charges, page 12-12 • Setting Up Default Response and Resolution Times, page 7-34
Set up service request statuses.	Service request statuses provide a classification system which makes it possible for your organization to track the stage of a response to a customer problem from the initial customer contact to resolution.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Service Request Statuses, page 7-8

Implementation Step	Description	References
Group the statuses into status groups.	Status groups make it possible to assign different statuses to different service request types and to create permissible status transitions.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Status Groups, page 7-12
Set up service request types.	Agents use service request types to classify the customer problem. Different service request types can capture different information about the customer problem and even generate tasks for resolution.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Service Request Types, page 7-14
Map service request types to responsibilities.	Mapping service request types to responsibilities restricts their use to users logging in under those responsibilities. This mapping provides the basis of standard service request security.	• Setting Up Service Request Security, page 10-1
Organize service requests into categories for Oracle iSupport.	If you are using Oracle iSupport, creating categories organizes service request types into meaningful groups on the customer Web portal user interface. You can add images to help customers identify the correct service request type for their problem.	• Grouping Service Request Types into Categories for Oracle iSupport, page 7-17
Set up service request severities.	Service request severity reflects the support agent's perception of the reported service request. Service request severity is a mandatory field in the service request.	• Setting Up Service Request Severities, page 7-19
Set up service request urgencies.	The Urgency field indicates the customer's perception of the urgency of the service request. Urgency is an optional field in service requests.	• Setting Up Service Request Urgencies, page 7-21

Implementation Step	Description	References
Set up problem codes and map them to service request types, inventory items (individual items or categories), or a combination of the two.	Problem codes standardize the description of customer requests. Mapping them makes it possible to narrow an agent's choice to only those problem codes appropriate to each customer problem.	• Setting Up Problem Codes, page 7-22
Set up resolution codes and map them to specify where they are to be used.	Resolution codes provide a uniform way for agents to specify how a service request is resolved. You can specify which resolution codes are relevant to which service requests by mapping resolution codes to problem codes, service request types, inventory items (individual items or categories), or a combination of the three.	• Setting Up Resolution Codes, page 7-28
Set up service request linking.	You link service requests to indicate that one service request is a duplicate or the cause of another, for instance.	• Service Request Linking to Specify Duplication and Other Relationships, page 8-1
Specify the valid languages for the service request by setting up the Language Field.	Agents use this field to indicate a customer's preferred language for a specific service request.	• Setting Up the List of Values for the Language Field, page 7-40
Set up Message Action Codes.	This step is required only if you want to use the Oracle Workflow messaging feature.	• Setting Up Message Action Codes for Oracle Workflow Messaging, page 29-1
Set up task types and priorities.	This step is required only if you are using tasks for resolution of service requests.	• Setting Up Task Types and Priorities for Service Request Tasks, page 7-35
Create additional note types.	Note types classify the information your organization keeps on service request, tasks, and customers. You can create note types in addition to those included with your application.	• "Setting Up Notes" section of the *Oracle Common Application Calendar Implementation Guide* • Setting Up New Note Types for Service Requests and Tasks, page 7-36

Implementation Step	Description	References
Set up service request security.	Service request security is built on top of the standard application security. It makes it possible for you to restrict by responsibility the ability of users to view and update service requests and related objects.	• Setting Up Service Request Security, page 10-1
Set up work assignment and distribution.	Setting up assignment and distribution of service requests and related tasks to groups and individuals involves setups of service territories, system profiles, and Universal Work Queue.	• Implementing Work Assignment and Distribution, page 16-1
Set up automatic notifications.	By setting up automatic notifications, you can keep interested parties, including customers and agents, informed of any service request updates.	• Setting Up Notifications, page 21-1
Capture of additional service request information.	You can capture of additional service request information in a structured question and answer format at the time a service request is created by agents in the Contact Center and by customers on their Oracle iSupport Web portal. This capture of information using this feature is unique to the Contact Center and is incompatible with the extensible attributes architecture that you can use to capture additional information in the HTML modules. The captured information is stored in service request notes, however, so is visible in all modules.	• Capturing Additional Service Request Attributes in the Contact Center, page 40-1

Implementation Step	Description	References
Automatic task generation for service requests.	You can have the application automatically generate tasks for newly-created service requests. The following two methods of generating tasks are mutually exclusive. You must choose one. • Generate the tasks based on the service request's type, item, or item category, and theproblem code. This method is described in Generating Tasks Automatically., page 25-1 • If you have implemented the capture of additional attributes in the Contact Center in a previous step, you can instead generate tasks based on the information agents and customers enter in those attributes. See Generating Tasks on Additional Service Request Attributes, page 41-1.	• Generating Tasks Automatically, page 25-1 • Generating Tasks on Additional Service Request Attributes, page 41-1
Set up automatic closure of service requests and tasks.	You can set up the application to automatically close service requests when all their tasks are closed and prevent the closure of service requests when tasks are still open. The closing of service request tasks is independent of the service request status. If you do not implement closure automation, agents must remember to close all tasks when they close a service request and remember to close the service request after all tasks are completed.	• Automating Closure of Service Requests with Tasks, page 18-1

Implementation Step	Description	References
Set up the default response and resolution times.	Even if you do not use Oracle Service Contracts, you must still set up a default service level agreement to enable the defaulting of due dates on tasks and service request actions.	• Setting Up Default Response and Resolution Times, page 7-34
Set up duplicate checking for service requests.	You can have the application to flag existing service requests as potential duplicates if they are similar and were created within the time frame you specify. The application determines if the service requests are similar based on one or both of the following two types of information: • The customer and item • Incident address and the information captured through service request attributes	• Setting Up Duplicate Checking, page 9-1
Enable multiple time zone support.	Enabling multiple time zone support makes it possible for agents to use different time zones to view service request deadlines. This makes it easier to talk with customers about response and resolution times in the context of the customer time zone.	• Enabling Multiple Time Zone Support , page 31-1
Set up relationship plans.	Use relationship plans to alert agents to customer needs. Whenever an agent is working on a customer record that meets the conditions you specify, the application can automatically display an alert message or launch a script that guides the agent through the interaction with the customer.	• Setting Up Relationship Plans, page 23-1

Implementation Step	Description	References
Validate global address formats.	Agents can enter customer mailing addresses in the formats appropriate for the country where the customer is located. Six preset address formats are available. You can create additional ones.	• Specifying Global Address Formatting and Validation, page 27-1
Enable service request reports.	You can print the contents of service requests and in HTML, PDF, RTF, and XSL formats via an integration with Oracle XML Publisher.	• Enabling Service Request Reports, page 20-1
Implement Charges.	Charges is a component of the Oracle TeleService application that is used by many Oracle applications including Oracle Field Service and Oracle Depot Repair. You can use charges to: • Create orders for shipments • Create return orders (RMA) • Bill customers for any services provided to them	• Implementing Charges, page 12-2
If you are using Charges for items tracked by Oracle Install Base, then you must set up service activities and Oracle Install Base Transaction Subtypes.	You must perform the setups if you are using Charges to handle orders and returns for items tracked by Oracle Install Base, for example, units returned as part of Return Material Authorizations (RMAs) and other customer support logistics.	• Setting Up Charges for Items Tracked by Install Base , page 32-1

Implementation Step	Description	References
Set up electronic approvals and records.	You can set up service requests to require electronic approvals and to generate electronic audit records whenever an agent sets the service request to a specific status. You set up the approval rules in Oracle Approvals Management and the e-record templates in Oracle E-Records.	• Electronic Approvals and Records, page 19-1
Set up Web collaboration.	By enabling the real-time collaboration features of the Oracle Collaboration Suite, you can make it possible for agents and customers to participate in Web conferences, chats, and to share their computer desktops. Agents can use this capability to take control of the customer's computer and provide remote support.	• Setting Up Web Collaboration Information, page 24-1

Implementation Step	Description	References
Set up display of customer information summaries (customer profiles).	You can provide summaries of customer information, such as the number of open and escalated service requests, payments in arrears, and the number of expiring contracts. In the Service Request and Contact Center interface, agents can view the information in three places: • The Dashboard tab Available in the Contact Center (Oracle TeleService) and E-Business Center (Oracle TeleSales). • The Profile window Available in the Service Request and Override Customer Criticality windows in Oracle TeleService and the Repair Order window in Oracle Depot Repair.	• Setting Up Display of Customer , page 22-6
Set up Contact Center search preferences.	You can customize searches in the Contact Center by: • Setting up service key search preferences • Limiting searches to a specific country • Modify the list of service keys used for searches • Configuring customer search window defaults	• Setting Up Contact Center Search Preferences, page 35-1

Implementation Step	Description	References
Set up additional actions for the Contact Center.	The Install Base and Orders tabs of the Contact Center include actions that agents can use to speed up tasks such as the creation of service requests for an install base item or the creation of a new item instance. You can use the Oracle E-Business Suite Form Personalization to create new actions of your own or add code using the CUSTOM.pll stub library.	• Setting Up Contact Center Actions, page 36-1
Perform additional Contact Center setups.	Additional setups include: • Setting up critical customers • Setting up the Quick Menu • Setting up call wrap-up • Setting up party and account numbering • Enabling Oracle Knowledge Management • Enabling Oracle Scripting • Specifying the defaults for overriding customer criticality	• Additional Contact Center Setups, page 37-1

Implementation Step	Description	References
Enable telephony in the Contact Center or the Service Request windows.	For both the Contact Center and the Service Request windows, you can implement telephony either by: • Integration with Oracle Advanced Inbound, Oracle Universal Work Queue, and Oracle Advanced Outbound • Direct integration with third-party CTI software	• Enabling Telephony, page 38-1
Set up any customer tabs in the Contact Center.	You can create two custom tabs in the Contact Center window by modifying the code for the Contact Center form and the associated library.	• Setting Up Custom Tabs on the Contact Center, page 39-1
Enable Oracle Enterprise Asset Management integration for the Service Request window.	Agents can create service requests for internal assets maintained in Oracle Enterprise Asset Management using the Service Request window. The Contact Center does not support the integration.	• Enabling Integration with Oracle Enterprise Asset Management, page 7-38

Implementation Step	Description	References
Enable Oracle Email Center integration.	When you implement Oracle Email Center and enable the integration, agents can: • Compose and send e-mails to customers and customer contacts with one click • Use e-mail templates to populate the body of the e-mail, including information about the customer and the service request • View replies from customers • View a history of sent e-mails and their replies • Access the archived e-mail messages themselves	• Enabling Oracle Email Center, page 17-1
Set up any custom tabs in the Service Request window.	You can add two custom tabs in the Service Request window by modifying the code for the Service Request form and the associated library.	• Setting Up Custom Tabs on the Service Request Window, page 30-1
Set up indexing of text in service request summaries and notes for searches.	You must run the Service Request: Synchronize Text Index Program concurrent program to make it possible for agents to search for text in the summary and note fields of service requests.	• Indexing Note and Summary Text for Searches, page 7-37

Implementation Step	Description	References
Set up any additional system profiles and lookups.	You can use the Functional Administrator responsibility to obtain a list of all system profiles and lookups relevant to your implementation by searching by application. You search for "Service" for system profiles and lookups related to service requests, and "Customer Care" for those related to the Contact Center and other customer-related features.	• Obtaining a List of Valid System Profiles and Lookups, page 7-41

3

Service Desk Implementation Checklist

This chapter covers the following topics:

- Setups in Integrated Applications
- Implementation Tasks for Service Desk

Setups in Integrated Applications

This section provides guidelines for implementing integrated applications that are required to make your application work properly. References are provided to sections of this guide with additional setup details.

- Oracle Inventory Setups

  You should be aware of the Oracle Inventory setups listed in the table below:

What to Set Up	Comments
For items, select "Enabled" in the Service Request list on the Service tab of the Master Item window.	To be able to create a service request against an inventory item, you must select "Enabled" in the Service Request list on the Service tab of the Master Item window.

What to Set Up	Comments
• Category Sets • Category Codes • Item Category Assignments	Required only for restricting items on the service request based on item categories. Oracle Inventory provides the capability of maintaining multiple categorizations (category sets) for different uses. Most service implementations (especially manufacturing companies) can reuse an existing item category set defined for other applications rather than maintain a different item categorization for service.

- Oracle Install Base Setups

  The following table lists implementation setups for Oracle Install Base:

What to Set Up	Comments
Instance statuses must be marked as "Request Allowed".	You can log service requests only against instances in a status with "Request Allowed."

- Resource Manager Setups

  The following table lists implementation prerequisites for Resource Manager, a module of the Trading Community Architecture (TCA):

What to Set Up	Comments
Resources	In order to assign ownership of service requests to an agent, the agent must be set up as a resource. This step is required.
Resource Groups	In order to assign ownership of service requests to a group, the resource group must be associated with the usage of "Support". This step is required if you are assigning service requests to groups.

- Oracle Common Application Calendar Setups

You should be aware of the setups described in the following table. For details see the *Oracle Common Application Calendar Implementation Guide*:

What to Set Up	Comments
Note types and mappings	Required to manage notes associated with service requests. See Setting Up New Note Types for Service Requests and Tasks, page 7-36.
Task types and mappings	Required to use tasks in service requests. See Defining Task Types, page 41-5 and Setting Up Task Types and Priorities for Service Request Tasks, page 7-35.
Task statuses and transition rules	Required to use tasks in service requests.
Task templates	Required to automatically generate tasks for service requests.

- Oracle Territory Manager Setups

  You must enable the matching attributes you want to use for your service territories. These are listed in the Guidelines for Setting Up Service Territories , page 16-27in this guide.

- Oracle Knowledge Management Setups

  To enable knowledge management searches in Oracle TeleService, implement the application according to the steps outlined in the *Oracle Knowledge Management Implementation and Administration Guide.*

- Oracle Enterprise Asset Management Setups

  Implement as per *Oracle Enterprise Asset Management Implementation Guide*. In addition, you must also perform the steps detailed in Enabling Integration with Oracle Enterprise Asset Management, page 7-38.

- Oracle Field Service Setups

  Optional. Implement as per *Oracle Field Service Implementation Guide*.

Implementation Tasks for Service Desk

The table in this section provides you with a checklist of implementation steps for the Service Desk module of Oracle TeleService. Use this checklist to determine which

chapters and sections of this implementation guide are relevant to you.

The steps are listed in suggested implementation order. Not all steps depend on previous steps, but many do.

Follow the references for detail information and procedures in this and other guides.

Implementation Step	Description	References
Set up resources.	You must set up agents as resources using Assignment Manager before you can assign ownership of service requests to them. You must set up resource groups with the usage of "Support" to assign service requests to groups.	• Setting Up Resources, page 6-1 • Resource Manager section of the *Oracle Trading Community Architecture Administration Guide*
Set up business processes.	To default response and resolution times for service requests, you must set up the default service level agreement. This requires you to set up at least one business process. A business process provides a general classification of the work performed. You can set up different default response and resolution times by setting up multiple business processes.	• Setting Up Business Processes, page 7-1 • Setting Up Default Response and Resolution Times, page 7-34
Set up service request statuses.	Service request statuses provide a classification system which makes it possible for your organization to track the stage of a response to an employee problem from the initial contact to resolution.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Service Request Statuses, page 7-8

Implementation Step	Description	References
Group the statuses into status groups.	Status groups make it possible to assign different statuses to different service request types and to create permissible status transitions.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Status Groups, page 7-12
Set up service request types.	Agents use service request types to classify the employee problem. Different service request types can capture different information about the employee problem and even generate tasks for resolution.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Service Request Types, page 7-14
Map service request types to responsibilities.	Mapping service request types to responsibilities restricts their use to users logging in under those responsibilities. This mapping provides the basis of standard service request security.	• Setting Up Service Request Security, page 10-1
Organize service requests into categories for Oracle iSupport.	If you are using Oracle iSupport, creating categories organizes service request types into meaningful groups on the employee Web portal user interface. You can add images to help employees identify the correct service request type for their problem.	• Grouping Service Request Types into Categories for Oracle iSupport, page 7-17
Set up service request severities.	Service request severity reflects the support agent's perception of the reported service request. Service request severity is a mandatory field in the service request.	• Setting Up Service Request Severities, page 7-19

Implementation Step	Description	References
Set up service request urgencies.	The Urgency field indicates the employee's perception of the urgency of the service request. Urgency is an optional field in service requests.	• Setting Up Service Request Urgencies, page 7-21
Set up problem codes and map them to service request types, inventory items (individual items or categories), or a combination of the two.	Problem codes standardize the description of employee requests. Mapping them makes it possible to narrow an agent's choice to only those problem codes appropriate to each employee problem.	• Setting Up Problem Codes, page 7-22
Set up resolution codes and map them to specify where they are to be used.	Resolution codes provide a uniform way for agents to specify how a service request is resolved. You can specify which resolution codes are relevant to which service requests by mapping resolution codes to problem codes, service request types, inventory items (individual items or categories), or a combination of the three.	• Setting Up Resolution Codes, page 7-28
Set up service request linking.	You link service requests to indicate that one service request is a duplicate or the cause of another, for instance.	• Service Request Linking to Specify Duplication and Other Relationships, page 8-1
Specify the valid languages for the service request by setting up the Language Field.	Agents use this field to indicate an employee's preferred language for a specific service request.	• Setting Up the List of Values for the Language Field, page 7-40
Set up task types and priorities.	This step is required only if you are using tasks for resolution of service requests.	• Setting Up Task Types and Priorities for Service Request Tasks, page 7-35

Implementation Step	Description	References
Create additional note types.	Note types classify the information your organization keeps on service request, tasks, and employees. You can create note types in addition to those included with your application.	• "Setting Up Notes" section of the *Oracle Common Application Calendar Implementation Guide* • Setting Up New Note Types for Service Requests and Tasks, page 7-36
Set up service request security.	Service request security is built on top of the standard application security. By mapping service request types to responsibilities, you restrict by responsibility the ability of users to view and update service requests and related objects. Alternately, you can choose to implement your own application security.	• Setting Up Service Request Security, page 10-1
Set up work assignment and distribution.	Setting up assignment and distribution of service requests and related tasks to groups and individuals involves setups of service territories, and system profiles.	• Implementing Work Assignment and Distribution, page 16-1
Set up automatic notifications.	By setting up automatic notifications, you can keep interested parties, including employees and agents, informed of any service request updates.	• Setting Up Notifications, page 21-1

Implementation Step	Description	References
Set up the capture of custom service request attributes through extensible attributes or descriptive flexfields.	You can capture additional service request information using either extensible attributes or descriptive flexfields. Using extensible attributes, you can: • Capture an unlimited number of additional attributes. (The number of descriptive flexfields is fixed.) • Extensible attributes permit multirow entries making it possible for agents to enter multiple items on the same service request. (Descriptive flexfields permit only a single row.) • You can capture global attributes (visible in all service requests) as well as attributes specific to a service request type. You can expose the descriptive flexfields using the Oracle Application Personalization Framework. Service Desk does not support context-sensitive descriptive flexfields.	• Capturing Additional Service Request Information with Extensible Attributes, page 45-1 • For information on exposing descriptive flexfields see the *Oracle Application Framework Personalization Guide* and Configuring and Personalizing HTML Modules, page 43-1.
Automatic task generation for service requests.	You can have the application automatically generate tasks for newly-created service requests based on the service request's type, item or item category, and problem code.	• Generating Tasks Automatically, page 25-1

Implementation Step	Description	References
Set up automatic closure of service requests and tasks.	You can set up the application to automatically: • Close service request when all their tasks are closed • Prevent the closure of service requests when tasks are still open • Close tasks that have not been worked on The closing of service requests tasks is independent of the service request status. If you do not implement closure automation, agents must remember to close all tasks when they close a service request and remember to close the service request after all tasks are completed.	• Automating Closure of Service Requests with Tasks, page 18-1
Set up the default response and resolution times.	Even if you do not use Oracle Service Contracts, you must still set up a default service level agreement to enable the defaulting of due dates on tasks and service request actions.	• Setting Up Default Response and Resolution Times, page 7-34
Enable service request reports.	You can print the contents of service requests and in HTML, PDF, RTF, and XSL formats via integration with Oracle XML Publisher.	• Enabling Service Request Reports, page 20-1

Implementation Step	Description	References
Set up electronic approvals and records.	You can set up service requests to require electronic approvals and to generate electronic audit records whenever an agent sets the service request to a specific status. You set up the approval rules in Oracle Approvals Management and the e-record templates in Oracle E-Records.	• Electronic Approvals and Records, page 19-1
Set up Web collaboration.	By enabling the real-time collaboration features of the Oracle Collaboration Suite, you can make it possible for agents and employees to participate in Web conferences, chats, and to share their computer desktops. Agents can use this capability to take control of the employee's computer and provide remote support.	• Setting Up Web Collaboration, page 24-1
Enable Oracle Enterprise Asset Management integration for the Service Request window.	Agents can create service requests for internal assets maintained in Oracle Enterprise Asset Management.	• Enabling Integration with Oracle Enterprise Asset Management, page 7-38

Implementation Step	Description	References
Enable Oracle Email Center integration.	When you implement Oracle Email Center and enable the integration, agents can: • Compose and send e-mails to employees with one click • Use e-mail templates to populate the body of the e-mail • View replies • View a history of sent e-mails and their replies • Access the archived e-mail messages themselves	• Enabling Oracle Email Center, page 17-1
Set up indexing of text in service request summaries and notes for searches.	You must run the Service Request Synchronize Index concurrent program to make it possible for agents to search for text in the summary and note fields of service requests.	• Indexing Note and Summary Text for Searches, page 7-37
Set up any additional system profiles and lookups.	You can use the Functional Administrator responsibility to obtain a list of all system profiles and lookups relevant to your implementation by searching by application. Relevant system profiles and lookups are classified under the "Service" application.	• Obtaining a List of Valid System Profiles and Lookups, page 7-41

Implementation Step	Description	References
Set up the default customer.	Service Desk hides customer information by default, but each service request still requires a customer entry. To satisfy this requirement, you must specify a default customer in the system profile Service: Default Customer Name. If you do want to expose customer information, then do not specify any value for this system profile and use Oracle Applications Personalization to expose the hidden customer regions.	• Specifying the Default Customer for Case Management and Service Desk, page 44-1 • Configuring and Personalizing HTML Modules, page 43-1
Configure and personalize the application.	Configuring and personalizing the application involves: • Specifying the Service Desk template for the responsibility you are creating. • Choosing the Agent Dashboard variations depending on the work assignment and distribution model you have implemented. • Modifying what appears in the user interface by modifying lookups and using Oracle Application Framework Personalization.	• Configuring and Personalizing HTML Modules, page 43-1 • *Oracle Application Framework Personalization Guide*

Implementation Step	Description	References
Set up the agent key performance indicators.	Key performance indicators provide agents with statistics about their personal and group's response to employee service requests in the Key Performance Indicator region of the Agent Dashboard.	• Understanding and Setting Up Key Performance Indicators, page 44-3
Modify the definition of jeopardy.	The application considers service requests with expected response or resolution dates prior to the current date (or within a defined period prior to the current date) as in jeopardy. You can extend the range of service requests that are considered by the application as in jeopardy by extending the time period.	• Setting Up Jeopardy for Service Requests , page 44-6
Modify notes.	By default, the application does not permit anyone, including the author, to edit a note after it is saved. However, you can modify notes by adding functions.	• Modifying Notes, page 44-2

4

Case Management Implementation Checklist

This chapter covers the following topics:

- Setups in Integrated Applications
- Implementation Tasks for Case Management

Setups in Integrated Applications

This section provides guidelines for implementing integrated applications that are required to make your application work properly. References are provided to sections of this guide with additional setup details.

- Resource Manager Setups

  The following table list implementation prerequisites for Resource Manager, a module of the Trading Community Architecture (TCA):

What to Set Up	Comments
Resources	In order to assign case ownership to an agent, the agent must be set up as a resource. This step is required.
Resource Groups	In order to assign ownership of cases to a group, the resource group must be associated with the usage of "Support". This step is required if you are assigning cases to groups.

- Oracle Common Application Calendar Setups

  You should be aware of the setups described in the following table. For details see the *Oracle Common Application Calendar Implementation Guide*:

What to Set Up	Comments
Note types and mappings	Required to manage case notes. See Setting Up New Note , page 7-36Types for Service Requests and Tasks.
Task types and mappings	Required to use tasks in cases. See Defining, page 41-5 Task Types and Setting Up Task Types and Priorities for Service , page 7-35 Request Tasks.
Task statuses and transition rules	Required to use tasks in cases.
Task templates	Required to automatically generate tasks for cases.

- Oracle Territory Manager Setups

  You must enable the matching attributes you want to use for case territories. These are listed in the Guidelines for Setting Up Service Territories , page 16-27in this guide.

- Oracle Knowledge Management Setups

  To enable knowledge management searches in Oracle TeleService, implement the application according to the steps outlined in the *Oracle Knowledge Management Implementation and Administration Guide*.

Implementation Tasks for Case Management

The table in this section provides you with a checklist of implementation steps for the Case Management module of Oracle TeleService. Use this checklist to determine which chapters and sections of this implementation guide are relevant to you.

> **Note:** Case Management uses most of the same setups as the rest of Oracle TeleService. User interfaces used in these setups refer to service requests rather than to cases.

The steps are listed in suggested implementation order. Not all steps depend on previous steps, but many do.

Follow the references to detailed information and procedures in this and other guides.

Implementation Step	Description	References
Set up resources.	You must set up agents as resources using Resource Manager before you can assign case ownership to them. You must set up resource groups with the usage of "Support" to assign cases to groups.	• Setting Up Resources, page 6-1 • Resource Manager section of the *Oracle Trading Community Architecture Administration Guide*
Set up business processes.	To display the default response and resolution times for cases, you must set up the default service level agreement. This requires you to set up at least one business process. A business process provides a general classification of the work performed. You can set up different default response and resolution times by setting up multiple business processes.	• Setting Up Business Processes, page 7-1 • Setting Up Default Response and Resolution Times, page 7-34
Set up case statuses.	Case statuses provide a classification system that makes it possible for your organization to track progress on a case. The setups are the same as for service request statuses.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Service Request Statuses, page 7-8
Group the statuses into status groups.	Status groups make it possible to assign different statuses to different case types and to create permissible status transitions. The setups are the same as for service request status groups.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Status Groups, page 7-12

Implementation Step	Description	References
Set up case types.	Agents use case types to classify the case. Different case types can capture different information and even generate tasks required for case resolution. To set up case types, set up service request types.	• About Statuses, Status Groups, and Service Request Types, page 7-2 • Setting Up Service Request Types, page 7-14
Map case types to responsibilities.	Mapping case types to responsibilities restricts their use to users logging in under those responsibilities. This mapping provides the basis of standard case security. Case security is the same as service request security.	• Setting Up Service Request Security, page 10-1
Set up case severities.	Case severity reflects the support agent's perception of the case severity. Case severity is a mandatory field. You must set up case severities.	• Setting Up Service Request Severities, page 7-19
Set up case urgencies.	The Urgency field indicates how the external parties associated with the case perceive the urgency of the case. Urgency is an optional field in cases.	• Setting Up Service Request Urgencies, page 7-21
Set up issue types and map them to case types.	Issue types standardize case descriptions. Mapping them to case types makes it possible to narrow an agent's choice to only those issue types appropriate to each case type. To set up issue types, set up problem codes.	• Setting Up Problem Codes, page 7-22

Implementation Step	Description	References
Set up resolution types and map them to specify where they are to be used.	Resolution types provide a uniform way for agents to specify how a case is resolved. You can specify which resolution types are relevant to which case by mapping resolution types to issue types and case types. You must set up resolution types.	• Setting Up Resolution Codes, page 7-28
Set up case linking.	You link cases to indicate that one case is a duplicate or the cause of another, for instance. To set up case linking, set up service request linking.	• Service Request Linking to Specify Duplication and Other Relationships, page 8-1
Specify the valid languages for the case by setting up the Language Field.	Agents can use this field to indicate a preferred language for communications regarding a case.	• Setting Up the List of Values for the Language Field, page 7-40
Set up task types and priorities.	This step is required only if you are using tasks for case resolution.	• Setting Up Task Types and Priorities for Service Request Tasks, page 7-35
Create additional note types.	Note types classify the information your organization keeps on cases and tasks. You can create note types in addition to those included with your application.	• "Setting Up Notes" section of the *Oracle Common Application Calendar Implementation Guide* • Setting Up New Note Types for Service Requests and Tasks, page 7-36

Implementation Step	Description	References
Set up case security.	Case security (the same as Service Request Security) is built on top of the standard application security. By mapping case types to responsibilities, you restrict by responsibility the ability of users to view and update cases and related objects. Alternately, you can choose to implement your own case security.	• Setting Up Service Request Security, page 10-1
Set up work assignment and distribution.	Setting up assignment and distribution of cases and related tasks to groups and individuals involves setups of case territories and system profiles.	• Implementing Work Assignment and Distribution, page 16-1
Set up associated party roles and role groups.	Party roles describe the role parties (individuals or organizations) play in the case. For a smuggling case, the roles may include suspect, lawyer, investigator, and forensic specialist, for example. Social service agency cases may instead require case worker, teacher, and psychologist. Party role groups classify the party roles and make it possible to display only a subset of the associated party roles at a time. The role group Investigative Team may include police officers, lawyers, and forensic specialists, for example. Role groups are also useful to keep teams of people notified of the progress in a case using notifications.	• Setting Up Asociated Parties, page 50-1
Set up automatic notifications.	By setting up automatic notifications, you can keep interested individuals or groups updated on the progress of a case.	• Setting Up Notifications, page 21-1

Implementation Step	Description	References
Set up the capture of additional case information through extensible attributes or descriptive flexfields.	You can capture additional case information using either extensible attributes or descriptive flexfields. Using extensible attributes, you can: • Capture an unlimited number of additional attributes. (The number of descriptive flexfields is fixed.) • Extensible attributes permit multirow entries making it possible for agents to enter multiple items in the same case. (Descriptive flexfields permit only a single row.) • You can capture global attributes (visible in all cases) as well as attributes specific to a case type. You can expose the descriptive flexfields using the Oracle Application Personalization Framework. Case Management does not support context-sensitive descriptive flexfields.	• Capturing Additional Service Request Information with Extensible Attributes, page 45-1 • For information on exposing descriptive flexfields see the *Oracle Application Framework Personalization Guide* and Configuring and Personalizing HTML Modules, page 43-1.
Set up the capture of additional information on associated parties using associated party extensible attributes.	You can capture information about the parties you associate to a case using the same extensible attribute architecture that is used for capturing case information. For example, an investigative agency can use attributes set up with this architecture to capture charges against a suspect in a case. A social services agency can use it to capture eligibility information for benefits.	• About Capturing Associated Party Information in a Case, page 50-11 • Capturing Additional Service Request Information with Extensible Attributes, page 45-1

Implementation Step	Description	References
Set up automatic task generation.	You can have the application automatically generate tasks for newly-created cases based on the case and issue type.	• Generating Tasks Automatically, page 25-1
Set up automatic closure of cases and tasks.	You can set up the application to automatically: • Close cases when all their tasks are closed • Prevent the closure of cases when tasks are still open • Close tasks that have not been worked on The closing of case tasks is independent of the case status. If you do not implement closure automation, agents must remember to close all tasks when they close a case and remember to close the case after all tasks are completed.	• Automating Closure of Service Requests with Tasks, page 18-1
Set up the default response and resolution times.	Set up a default service level agreement to display the default due dates on cases.	• Setting Up Default Response and Resolution Times, page 7-34
Enable case reports.	You can print case information in HTML, PDF, RTF, and XSL formats via integration with Oracle XML Publisher.	• Enabling Service Request Reports, page 20-1
Set up electronic approvals and records.	You can set up cases to require electronic approvals and to generate electronic audit records whenever an agent sets the case to a specific status. You set up the approval rules in Oracle Approvals Management and the e-record templates in Oracle E-Records.	• Electronic Approvals and Records, page 19-1

Implementation Step	Description	References
Set up Web collaboration.	By enabling the real-time collaboration features of the Oracle Collaboration Suite, you can make it possible for agents and others to participate in Web conferences, chats, and to share their computer desktops.	• Setting Up Web Collaboration, page 24-1
Set up indexing of text in case summaries and notes for searches.	You must run the Service Request Synchronize Index concurrent program to make it possible for agents to search for text in the summary and note fields.	• Indexing Note and Summary Text for Searches, page 7-37
Set up any additional system profiles and lookups.	You can use the Functional Administrator responsibility to obtain a list of all system profiles and lookups relevant to your implementation by searching by application. You can search for system profiles and lookups beginning with "Service" to find those related to cases.	• Obtaining a List of Valid System Profiles and Lookups, page 7-41
Configure and personalize the application.	Personalizing the application involves: • Specifying the Case Management template for the responsibility you are creating. • Choosing the Agent Dashboard variations depending on the work assignment and distribution model you have implemented. • Modifying what appears in the user interface by modifying lookups and using Oracle Application Framework Personalization.	• Configuring and Personalizing HTML Modules, page 43-1 • *Oracle Application Framework Personalization Guide*

Implementation Step	Description	References
Modify the definition of jeopardy.	The application considers cases and tasks with expected response or resolution dates prior to the current date (or within a defined period prior to the current date) as in jeopardy. You can extend the range of cases that are considered by the application as in jeopardy by extending the time period.	• Setting Up Jeopardy for Service Requests and Tasks, page 44-6
Modify notes.	By default, the application does not permit anyone, including the author, to edit a note after it is saved. However, you can modify notes by adding functions.	• Modifying Notes, page 44-2
Set up the default customer	Case Management hides customer information by default, but each case still requires a customer entry. If agents do not enter the customer, you must specify a default customer in the system profile Service: Default Customer Name. If you do want to expose customer information, then do not specify any value for this system profile and use Oracle Applications Personalization to expose the hidden customer regions. See Configuring Case Management for Social Services, page 49-1.	• Specifying the Default Customer for Case Management and Service Desk, page 44-1 • Configuring Case Management for Social Services, page 49-1
Set up unknown parties.	If you want to capture information about parties whose identities are not known, such as perpetrators in a crime, you can do so by setting up one or more unknown parties.	• Capturing Information About Unknown Parties in a Case, page 49-2

Implementation Step	Description	References
Change wording of error and other informational messages.	All messages (error, warning, informational) as well as notification templates use the term "service request". As an implementation step, you may want to replace messages beginning with "CS" with the proper term, such as "case" or " matter".	• *Oracle Applications Developer's Guide*
Purge cases as required.	You can permanently purge cases and related information from your database by running the Service Request Data Purge concurrent program.	• Purging Service Requests or Cases, page 28-1

Part 2

High Availability

This part of the guide includes procedures to implement High Availability (HA).

5

Implementing High Availability

This chapter covers the following topics:

- About High Availability
- High Availability Solution
- Critical Business Functions Available in High Availability
- Setting Up High Availability
- Importing Transaction Logs
- About Mapping Responsibilities
- Concurrent Program Supported in TeleService in High Availability
- User Actions Supported in TeleService in High Availability

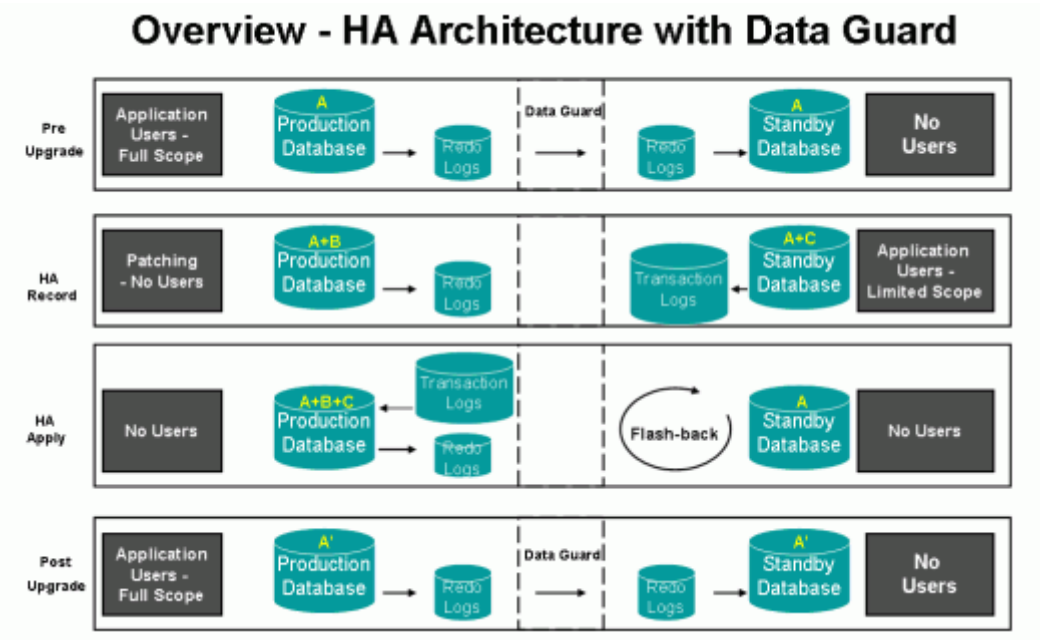
About High Availability

Organizations providing round the clock support to their customers require computer systems to also be available 24x7. Hence, any planned or unplanned outages may bring down employee productivity, reduce customer satisfaction and affect business until all systems are back up and running. Service companies that have shorter turnaround times can adversely be affected by such downtimes. Oracle TeleService provides high availability (HA) of critical features. This feature is especially useful where a single instance is run and entire operations are affected by these downtimes.

High availability refers to enabling operational continuity of the business critical functions of application or system during a scheduled production outage. Planned production downtime may be due to patch applications or other system configurations that require that the production instance is taken offline or restarted.

High Availability Solution

The diagram given below describes the four phases in High Availability.



1. **Pre-Upgrade**

   The production instance is online and another standby database, a clone of the production instance, is created with Data Guard Flashback, a technology used to track and maintain historical changes to data.

   The standby instance is configured to:

   1. Disable responsibilities that are not used in the HA mode. The standby instance contains only HA responsibilities.
   2. Hide/disable fields and features not supported by HA via personalization.
   3. Disable concurrent programs that are not used in the HA mode.
   4. Disable all workflows and business events that are not used in the HA mode.

   When the configuration is complete, the standby database is ready to act as the primary instance for the duration of the outage.

2. **High Availability Record**

   The production instance is taken offline for patching and the standby high availability is put online. Users can connect to the high availability instance to perform critical business transactions, which are captured and can be replayed in the production instance.

   Click Start HA Record on the HA Console to start the HA Record phase. Only one active HA Record session is permissible at any specific time and this phase must end before importing in the HA Apply phase. However, multiple HA Record

sessions can be processed during a single HA Apply session.

Once the HA Record phase starts, users can connect to the HA instance.

3. **High Availability Apply**

   The production instance and the high availability instance are brought down for a limited time and the log from the high availability instance is imported into the production instance.

   Once the log is successfully replayed on the production instance, the HA database is refreshed from the production instance so that the HA instance and the production instance are synchronized.

   Click the Apply button on the HA Console to initiate this phase. Before this phase is initiated, the transaction logs must be imported into the patched production instance. The HA Console lists all available HA Record sessions that are ready to be applied. If multiple HA Record sessions are pending they are uploaded in a sequential manner, starting with the oldest session to the latest session.

   > **Caution:** : The profile Task Manager: Enable Audit is automatically set to No during this phase and administrators must NOT set this profile option manually. This profile is used to enable audit of tasks. It is set to No during the HA Apply phase to switch off auditing of tasks. After the HA Apply phase is complete this profile is again automatically set to Yes.

4. **Post Upgrade**

   The production instance is brought online and all users can connect back to this instance.

Critical Business Functions Available in High Availability

The following critical functions are required by Field Service providers to run their operations:

- Create, update and search service requests
- Dispatch and schedule Field Service technicians
- Create and update service request tasks and personal tasks
- Access task information and Debrief tasks by Field Service technicians

Assumptions

The High Availability solution assumes the following to support continuity of the above

operations during planned downtimes.

1. The HA instance is a clone of the production instance. The Data Guard technology provided by Oracle enables a standby database to serve as a clone of the production instance. The HA instance receives periodical updates from the production instance, which enables it to serve as a backup during downtime.

2. A limited downtime is acceptable when users are switching from one instance to another. This is required for preparation of the HA instance and replaying the transactions back on the production instance.

Setting Up High Availability

You must set up High Availability with the Service High Availability Administrator responsibility. Setting up High Availability involves the HA Record and the HA Apply phases.

The HA Record phase comprises of three stages – Initiation, Record, and Termination. Before users can connect to the HA instance, the Service High Availability Administrator must map the responsibilities to the HA responsibilities. See Mapping Responsibilities, page 5-7 for information on how to map the responsibilities.

The detailed setup procedure is given below:

Initiation

1. The production instance must be offline for patching.

2. Click Start Recording on the HA Console to :

    1. Assign users to their appropriate HA responsibilities on the HA instance.

    2. Inactivate all concurrent programs, workflows, and business events that are not used in HA mode.

    3. The profile CSM: High Availability Mode is automatically set to HA_RECORD and administrators must NOT set this profile option manually. This profile value is used in CSM_HA_SERVICE_PUB PL/SQL package to enable other products to check if the system is in HA Record mode.

Record

All updates to Service/Field Service tables are monitored in this stage. Any insert or update on a service entity is recorded into the Payload table. In the same transaction, if there are any updates to auxiliary tables that are dependent on the entity then these are also tracked and recorded.

Termination

After patching of the production instance is complete the HA Record phase must be

terminated.

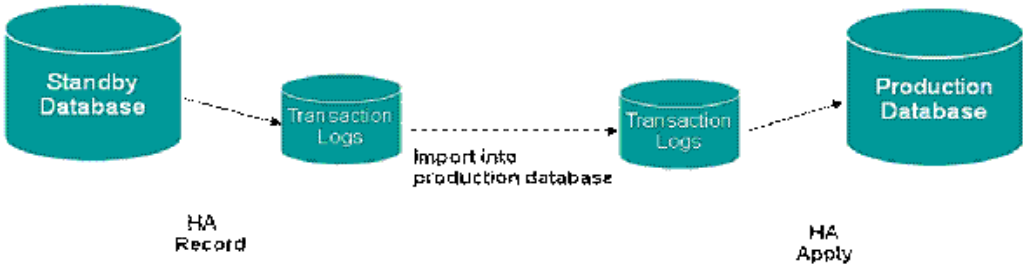
1. Click End Recording on the HA Console to terminate this phase to:
    1. Save the MFS Deferred INQ and Oracle Lite Mobile Admin data for mobile field service operations.
    2. Set the CSM: High Availability Mode profile option to HA_STOP.
    3. Save the final sequence values of business entities. The list of sequences to be checked is maintained in the CSM_HA_SEQ_MAPPINGS table.
    4. Terminate the current session by updating the CSM_HA_SESSION_INFO table.

HA Apply

1. Import the transaction log to the production instance.
2. Bring up the production instance after the HA instance returns to the pre-HA mode.
3. Connect users back to the production instance.

Importing Transaction Logs

Transaction logs comprise several database tables containing all data captured in the HA Record phase. During the HA Record phase the transaction log is used to capture information on users' activities.



You can import the transaction logs using any of the following methods:

1. **Database Links** - This method is shipped out of the box with the HA feature and includes the script, csmhaimp.sql. This script is used to import data from the selected tables using SQL using database links. The basic assumption is that a database link must be present to import the transaction logs.
2. **Transportable Tablespaces** - You can use transportable tablespaces to import the transaction logs if it is not feasible for you to use the database links method. The transaction logs must be a part of a single schema, CSM_HA. The DBA must move

these tables into the CSM_HA schema.

The CSM_HA schema must be created in a separate tablespace so that it can be configured to be a transportable tablespace. The tables to be included in the CSM_HA schema are as follows:

1. CSM_HA_SESSION_INFO
2. CSM_HA_PAYLOAD_DATA
3. CSM_HA_SESSION_SEQ_VALUES
4. CSM_HA_DEFERRED_INFO
5. CSM_HA_AUDIT

> **Note:** The Transportable Tablespaces option cannot be used if the database version has changed.

3. **Data Pump** - A third option is to use Data Pump to import transaction logs.

The following scripts must be executed after connecting as an apps schema user, and can be run from any tier, which can be connected to the database.

> **Note:** The SQL scripts complement the existing functionality in the UI.

Scripts to be run on the production database:

1. csmhasta.sql – A script to start HA Recording on the standby database. No parameters are required.
2. csmhaend.sql – A script to end HA Recording on the standby database. No parameters are required.

Scripts to be run on the standby database:

1. csmhaimp.sql – A script to import transaction logs from the standby database to the production database using the database link. This script must be run from the production database and prompts for the database link to connect to the standby database. The database link should be specified as a parameter and must connect to the apps schema user on the standby database. You can modify the script to hard code your db link name to avoid the prompt for the database link name.
2. csmhaapy.sql – A script to apply the imported transaction logs in the production database. A concurrent request is submitted to process the transactions. The Concurrent Manager must be running before this script is executed.

About Mapping Responsibilities

Responsibilities enable users to access different user interfaces on the high availability instance. During the HA Record phase, users are given access only to the HA equivalents of their standard production responsibilities. The HA responsibilities give access to a limited set of user interfaces and functions that are available on the HA instance. When the production instance is restored, users can resume with their regular responsibilities.

The Service High Availability Administrator must map the responsibilities on the production instance. Since the high availability instance is a clone of the production instance, the responsibility mapping performed on the production instance is available on the high availability instance when the production instance is brought offline. The fields on the High Availability Responsibility Mapping page display the list of active responsibilities in Service, Field Service, and Mobile Field Service.

Seeded Responsibilities

The seeded responsibilities for TeleService are:

- Customer Support Specialist HA
- Service HA

Before the HA instance is made available,

1. Only the System Administrator responsibility is available
2. All responsibilities that are marked as HA responsibilities are available. Responsibilities on the production instance are mapped to responsibilities on the HA instance.
3. No other responsibilities are available on the HA instance.
4. These HA responsibilities are then assigned to users with corresponding normal responsibilities.
5. Barring a few required programs for Service all other concurrent programs, workflows, and business events cannot be run on the HA instance. See Concurrent Requests Supported in TeleService in High Availability, page 5-8
6. Users have access to the regular responsibilities when they move back to the production environment.

Mapping Responsibilities

Use this procedure to map responsibilities on the production instance.

To map responsibilities:

1. On the High Availability Responsibility Mapping page, select the responsibility name from the Responsibility Name list. All responsibility mappings related to the selected responsibility are displayed in the Application Name, HA Application Name, and HA Responsibility Name fields.

2. Click Delete to delete a responsibility mapping. To delete multiple responsibility mappings select the check box next to the mapping and click Delete.

3. Click the Add icon to add a responsibility mapping.

4. Click Apply.

5. Click OK. The values in this setup are saved to the CSM_HA-RESP_MAPPINGS table that is used during the HA Record start phase.

Concurrent Program Supported in TeleService in High Availability

Automatic Assignment of Resource for Service Request is the only concurrent program that is supported on the high availability instance.

User Actions Supported in TeleService in High Availability

The following table lists the user actions/functionality that is supported in HA. Features that have the Capture Transaction in HA Mode column set to Y (Yes) are supported in HA mode. These functions/transactions are captured and replayed in the production instance. Features that are set to N (No) in the Capture Transaction in HA Mode column must either be hidden, disabled or enabled in read-only mode so that users cannot make updates that are not captured. In OA HTML pages, you can do this through personalization.

Features that have the Enabled in UI in HA Mode column set to Y are displayed on the UI and can be accessed in the HA mode. For features that are marked as N, users cannot access them and the feature can either be disabled or is not shown on the UI.

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
SR Form	Create SR - Header	Create one-time address	Y	Y
		Select incident address	Y	Y
		Select contact, contact phone, contact address, time zone	Y	Y
		Select customer, customer account, customer address	Y	Y
		Select item/instance/serial number	Y	Y
		Select service request type	Y	Y
		Select status	Y	Y
		Select severity	Y	Y
		Assign SR to group, owner manually	Y	Y
		Assign SR to group, owner via assignment manager	Y	Y
		Enter problem summary	Y	Y
		Select problem code	Y	Y
		Select urgency	Y	Y
		Enter error code	Y	Y
		Enter notes	Y	Y
		Select note type	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
		Select note visibility	Y	Y
		Enter SR flexfields	Y	Y
		Select tag number, system, item description	Y	Y
		Select revision, contract number	Y	Y
		Auto Assignment of Group/Owner	Y	Y
		All search capabilities: Customer, item instance ,incident addresses, etc	N	Y
		Create new contact	N	N
	Create SR - Subject Tab			
		Select covered site	Y	Y
		Refresh site button	Y	Y
		Instance configuration button	N	Y, but personalize pop-up OA UI to read-only

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Instance Detail button	N	Y, but personalize pop-up OA UI to read-only
		Register Instance	N	N
		Get Contracts button	Y	Y
		Select component	Y	Y
		Select item instance	Y	Y
		PLM Extensible Attributes (Customer Support)	N	N
	Create SR - Workbench Tab			
		Enter problem summary	Y	Y
		CIC Extensible Attributes (SR Form)	Y	Y
		Select problem code	Y	Y
		Select urgency	Y	Y
		Enter error code	Y	Y
		Enter resolution summary	Y	Y
		Enter resolution code	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Enter resolve by date	Y	Y
		Enter responded by date	Y	Y
		Enter resolved by date	Y	Y
		Search knowledge base button	N	Y
		Link/Unlink Solution button	N	N
		Refresh button	N	Y
		View By LOV	N	Y
		Print Friendly Button	N	Y
		Enter View B From/To Dates	N	Y
		Select note type	Y	Y
		Enter note description	Y	Y
		Select note visibility	Y	Y
		Select Note Details button	Y	Y
		Select Log and Notes button	Y	Y
		New note button	Y	Y
	Create SR - Contacts/Addresses Tab			

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Associate contacts to SR (select from existing contacts, not create new contacts	Y	Y
		Change primary contact	Y	Y
		Select Bill-To Address	Y	Y
		Select Bill-To Contact	Y	Y
		Select Ship-To Address	Y	Y
		Select Ship-To Contact	Y	Y
	Create SR - Tasks Tab			
		Select task type	Y	Y
		Select task status	Y	Y
		Select priority	Y	Y
		Select owner type, owner manually	Y	Y
		Select owner type, owner via assignment manager	Y	Y
		Select assignee type, assignee	Y	Y
		Enter subject	Y	Y
		Enter description	Y	Y
		Enter task flexfields	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
		Select parent	Y	Y
		Select/unselect restrict closure flag	Y	Y
		Access to display time zone LOV (agent, corporate, incident) Y	Y	Y
		Enter Planned, Scheduled, Actual Start Date	Y	Y
		Enter Planned, Scheduled, Actual End Date	Y	Y
		Enter Planned Effort, Actual Effort, Duration	Y	Y
		Select Publish flag	Y	Y
		Select Private flag	Y	Y
		Copy Task button	Y	Y
		Task notes button	Y	Y
		Parts Search button (see details of UI below)	N	Y
		Skills button	Y	Y
		Access Hours button	Y	Y
		Use Template button	Y	Y
		Auto product skill requirement	Y	Y
	Create SR - Interactions Tab	Display interactions	N	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
	Create SR - Related Objects Tab	Enter related objects	Y	Y
	Create SR - Service History Tab	View Service History	N	Y
	Create SR – Misc	SR Duplicate Checking	N	N/A
		SR Audit	Y – rely on SR API to create audit records on the production instance	N/A
		Auto task creation	Y	N/A
	Update SR - Header	Create one-time address	Y	Y
		Change incident address	Y	Y
		Select a different contact time zone	Y	Y
		Select a different customer account, customer address	Y	Y
		Select a different item/instance/serial number	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Update SR Type	Y	Y
		Update status	Y	Y
		Update severity	Y	Y
		Assign SR to different group, different owner manually	Y	Y
		Assign SR to different group, different owner via assignment manager	Y	Y
		Change problem summary	Y	Y
		Update problem code	Y	Y
		Update urgency	Y	Y
		Update error code	Y	Y
		Enter notes	Y	Y
		Select note type	Y	Y
		Select note visibility	Y	Y
		Enter SR flexfields	Y	Y
		Update notes	Y	Y
	Update SR - Subject Tab			
		Select different covered site	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Refresh site button	N	Y
		Instance configuration button	N	N
		Instance Detail button	N	Y, but open up the page in read-only
		Register Instance	N	N
		Get Contracts button	Y	Y
		Select component	Y	Y
		Select item instance	Y	Y
	Update SR - Workbench Tab			
		Update problem summary	Y	Y
		Update problem code	Y	Y
		Change urgency	Y	Y
		Change error code	Y	Y
		Enter/update resolution summary	Y	Y
		Enter/update resolution code	Y	Y
		Update resolve by date	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Enter/update responded by date	Y	Y
		Enter/update resolved by date	Y	Y
		Search knowledge base button	N	Y
		Unlink Solution button	N	N
		Refresh button	N	Y
		View By LOV	N	Y
		Print Friendly Button	N	Y
		Enter View By From/To Dates	N	Y
		Select note type	Y	Y
		Enter note description	Y	Y
		Select note visibility	Y	Y
		Select Note Details button	Y	Y
		Select Log and Notes button	Y	Y
		New note button	Y	Y
	Update SR - Contacts/Addresses Tab			
		Add more contacts to SR	Y	Y
		Change primary contact	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
		Select Bill-To Address	Y	Y
		Select Bill-To Contact	Y	Y
		Select Ship-To Address	Y	Y
		Select Ship-To Contact	Y	Y
	Update SR - Tasks Tab			
		Select/update task type	Y	Y
		Select/update task status	Y	Y
		Select/update priority	Y	Y
		Select/update owner type, owner manually	Y	Y
		Select/update owner type, owner via assignment manager	Y	Y
		Select/update assignee type, assignee	Y	Y
		Enter/update subject	Y	Y
		Enter/update description	Y	Y
		Enter/update task flexfields	Y	Y
		Select/update parent	Y	Y
		Select/unselect restrict closure flag	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
		Access to display time zone LOV (agent, corporate, incident) Y	Y	Y
		Enter Planned, Scheduled, Actual Start Date	Y	Y
		Enter Planned, Scheduled, Actual End Date	Y	Y
		Enter Planned Effort, Actual Effort, Duration	Y	Y
		Select Publish flag	Y	Y
		Select Private flag	Y	Y
		Copy Task button	Y	Y
		Task notes button	Y	Y
		Parts Search button (see details of UI below)	N	Y
		Skills button	Y	Y
		Access Hours button	Y	Y
		Use Template button	Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Launch Workflow button	Refer to workflow section – task notification workflow. Ensure that it does not get sent multiple times	Y
		Updating task address	Y	Y
		Adding task attachments	Y	Y
		Enter resource requirements via Resource LOV (under More button) --	N	N
		Enter assignments	N	N
		Enter schedules	N	N
		Enter task dependencies	N	N
		Enter reference types	N	N

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
		Enter Date Types and Dates	N	N
		Enter Task Contacts	N	N
		Enter Task Contact Phones	N	N
		Enter Task Recurrences	N	N
		Enter Task currency	N	N
		Select Billable, Holiday, Multibook, Milestone flags	N	N
		View Task Audit	N	N
		View Assignment Audit	N	N
	Update SR - Interactions Tab	Display interactions	N	Y
	Update SR - Related Objects Tab	Enter related objects	Y	Y
	Update SR - Service History Tab	View Service History	N	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
	Update SR - Charges Tab	Action Tab	N	Charges is read only. Users are able to view charges but manual updates are not supported
		**Select/update Charge Line Type	N	N
		**Select/update Operating Unit	N	N
		**Select/update Business Process	N	N
		**Select/update Service Activity	N	N
		**Select/update Item	N	N
		**Select/update UOM	N	N
		**Enter/update qty	N	N
		**Enter/update return reason	N	N
		Item Instance Tab	N	N
		** Select/update item instance number	N	N
		** Select/update serial number	N	N

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		** Enter/update return by date	N	N
		Pricing Tab	N	N
		** Enter/update override unit price	N	N
		Pricing Rules Tab	N	N
		** Select different contract number	N	N
		** Select different price list	N	N
		** Enter Customer Purchase Number	N	N
		** Select Rate Type	N	N
		Bill To Tab	N	N
		** Select/update bill to party	N	N
		** Select/update bill to account	N	N
		** Select/update bill to address	N	N
		** Select/update bill to contact	N	N
		Ship To Tab	N	N
		** Select/update ship to party	N	N
		** Select/update ship to account	N	N
		** Select/update ship to address	N	N
		** Select/update ship to contact	N	N

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
		Order Details Tab	N	N
		** Select Shipping/Receiving Warehouse	N	N
		** Add to Order Number	N	N
		** OM Interface flag	N	N
		** Rollup flag	N	N
		Order Status tab	N	N
		** All Display fields	N	N
		Source tab	N	N
		** Drill into Source document	N	N
		** Everything else is read only	N	N
		Creation of charge lines via Debrief Posting Program	Y	N/A
	Update SR - Work Orders Tab		Y	Y
	Header - View Customer Profile		N	Y
	Header - View Log and Notes		N	Y
	Menu Commands for Create/Update SR		Y	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/Enable in UI in HA Mode
	Menu - Scripting		N	N
	Menu - Call Parameters		Y	Y
	Menu - Call Wrap Up		Y	Y
	Menu - Start Interaction		Y	Y
	Menu - End Interaction		Y	Y
	Menu - Web Availability		N	N
	Menu - Outbound Email		N	N
	Menu - Next Work		Y	Y
	Menu - Start Conference		N	N
	Menu - Compose Email for Contact		N	N
	Menu - Compose Email for Customer		N	N
	Menu - Contact Phone		N	N
	Menu - Customer Phone		N	N

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
	Menu - Contact Center		N	N
	Menu - Site Contact Points		N	N
	Menu - Notes		Y	Y
	Menu - Audit Report		N	Y
	Menu - Request Escalation		N	N
	Menu - Fulfillment Request		N	N
	Menu - Task Escalation		N	N
	Menu - Quick Menu		N	N
	Menu - Copy Request		Y	Y
	Menu - Print Request		N	Y
	Menu - Print Margin Report		N	Y
	Menu - Send Message		N	Y
	Menu - View Message		N	Y

Module	Flow/Location	User Action	Capture Transaction in HA Mode	Show/ Enable in UI in HA Mode
	Menu - Search Item Instance		N	Y
	Menu - Add attachments		Y	Y
	Search SR	All search features	N	Y

Part 3

Common Setups

This part includes chapters describing all of the setups common to all of the Oracle TeleService modules including Case Management.

6

Setting Up Resources

This chapter covers the following topics:

- Process for Setting Up Oracle TeleService Resources
- Setting Up Resource Groups
- Importing Resources
- Setting Up Imported Resources

Process for Setting Up Oracle TeleService Resources

This topic provides an overview of resource setups for Oracle TeleService. All setups are done in Resource Manager, an application foundation module. Please see the Resource Manager section of the *Oracle Trading Community Architecture Administration Guide* for more details.

Prerequisites:

- Create employees in the Oracle Human Resources application's Human Resources People window. If you do not have a license to Oracle Human Resources, you can use the Enter Person window (Under the Service responsibility navigate to Resource Management, Maintain Employees, Employees).
- Create any other resources you wish to import including Parties, Supplier Contacts, TBH (To Be Hired), and others, in their respective applications.
- Set up users and any additional responsibilities according to the procedures in the *Oracle E-Business Suite Security Guide*.

To set up Oracle TeleService resources:

1. Optionally, create role types and roles. You can use these to specify the roles agents play in resource groups (for example, call center manager, call center agent, and customer support manger).

Role types and roles (which you can set up under the Service responsibility by navigating to Setup, Resource Management) are purely optional as they are not used by your application business logic.

2. Set up resource groups. These are used by the application to assign work. See Setting Up Resource Groups, page 6-2.

3. Import resources, for example, employees from the Oracle HRMS application. See Importing Resources, page 6-4.

4. Set up the imported resources and assign them to the groups. See Setting Up Imported Resources, page 6-5.

5. Assign your application responsibilities to the users.

6. After your initial resource setup, you must periodically run the Synchronize Employees concurrent program (to keep your employee resources and Oracle HRMS data synchronized) and the Synchronize Parties and Partners concurrent program (to keep your nonemployee resources synchronized).

   These concurrent programs can be run under the CRM Administrator responsibility. You can use the default parameters for running the program. After each synchronization, you must use the Resources maintenance window to assign any new resources to the resource groups and ensure their user names are displayed in the window. You must also make sure that their user records are assigned the proper responsibilities.

   The program automatically assigns an end date for the records of any terminated resources.

Setting Up Resource Groups

Groups are used by the application to assign work. (For details, see Implementing Work Assignment and Distribution, page 16-1) Making resources (employees or contingent workers) members of a group gives them access to the service requests and tasks assigned to that group.

To set up groups under the Service responsibility, navigate to Resource Management, Resources, Groups and create groups using the Create Groups window following the procedures in the *Oracle Trading Community Architecture Administration Guide*.

Note:

- For work assignment, Oracle TeleService ignores any group hierarchy you create.
- Entering roles is optional. They are not used by the application.
- You can assign employees to the groups you create either in the same window on

the Members tab or on the Groups tab of the Resource management window. (If you haven't imported employees yet, make the assignment later using the Resource window.)

- You must enter **Support** in the Application Areas field on the Used In tab. This entry is required for the application to use this group for assigning service requests and service request tasks.

- You can optionally assign a time zone for the resource group from the Time Zone list. This list displays the available time zones as defined in the FND_TIMEZONES table. If the Time Zone attribute is not defined for a group, the server time zone is considered as the time zone for the group.

  The Assignment Manager uses the Time Zone attribute to analyze the working shifts and holidays associated with the group during service request or task assignment.

  For example, if three resolving groups are defined in the Resource Manager with the following associated time zones:

Resolving Group	Time Zone
US Resolving Group	Pacific Standard Time - (PST) (GMT-8)
UK Resolving Group	Greenwich Mean Time - (GMT)
Australia Resolving Group	Australian Western Standard Time - (AWST) (GMT+8)

A shift pattern is defined for each of the above resolving groups in Oracle Common Applications Calendar as follows:

Shift Pattern for a Resolving Group

Begin	Duration			End	
Weekday	**Time**	**Hours**	**Minutes**	**Weekday**	**Time**
Monday	09.00	8	00	Monday	17.00
Tuesday	09.00	8	00	Tuesday	17.00
Wednesday	09.00	8	00	Wednesday	17.00

Thursday	09.00	8	00	Thursday	17.00
Friday	09.00	8	00	Friday	17.00

During assignment of service requests or task owner, the Assignment Manager checks if a shift pattern is defined for each of these resolving groups. The shift pattern enables the Assignment Manager to assign a service request or task to a group or individual with an active shift, thereby preventing assignment to a group or resource, which is not on an active shift.

You can enable or disable checking for a resource's availability through calendars by setting up the following profiles:

- Service: Check Resource Calendar Availability for SR Auto Assignment
- Service: Check Resource Calendar Availability for Task Auto Assignment

For more information refer, Overview of Service Request and Task Assignment, page 16-7

From the above defined shift patterns,

- If a service request is created between 9 am – 5 pm PST, it is routed to the US resolving group.
- If a service request is created between 5 pm – 2 pm PST, it is routed to the UK resolving group (because 5 pm-2 pm PST is 9 am – 5 pm GMT.)
- If a service request is created between 2 pm – 9 am PST, it is routed to the Australian resolving group (because 2 pm – 9 am PST is 9 am – 5 pm AWST.)

For more information, refer to *Oracle Common Applications Calendar User Guide*.

Importing Resources

Use these guidelines to import resources from Oracle HRMS and other applications such as Oracle Trading Community Architecture (Parties) and Oracle Purchasing (Supplier Contacts). For detailed procedures, please refer to the *Oracle Trading Community Architecture Administration Guide*.

To import resources:

1. Under the Service responsibility, navigate to Resource Management, then Maintain Resources, and then select Import Resources.
2. Use the Select Resources to Import window to search for resources by title or other

criteria.

3. Choose the category of resource you wish to import.

4. Select the employees to import and click **Start Import.** Optionally, you can assign a role to the resources you are importing in the Set Resource Attributes window.

Setting Up Imported Resources

Use these guidelines to set up the individual resources you have imported. This includes assigning them to resource groups. For detailed procedures, please refer to the *Oracle Trading Community Architecture Administration Guide*.

Prerequisites:

Create resource groups and import employees first.

To set up imported resources:

1. Under the Service responsibility, navigate to Resource Management, then Maintain Resources, and then select Resources.

2. You can search for the imported resources by their start date (the date recorded in Oracle HRMS) or other criteria. The transaction number is not used.

3. If you have already set up the resource as a user and the User Name field is not populated automatically, then enter the User Name using the User Name list of values. Normally, this list includes only one value.

   Note: You must make sure that each resource has a user name entered in this field.

4. Enter one or more resource groups on the Groups tab. This grants the resource access to service requests and tasks assigned to those groups. (Security restrictions apply. See Setting Up Service Request Security, page 10-1.)

5. Entries on the other tabs are optional.

6. Make entries on the Service tab according to the following guidelines:

   - **Time Zone**: Agent time zone. The entry you make here is used to determine in the automatic work assignment resource balancing formula to calculate the difference between the agent and customer time zone. (See Implementing Work Assignment and Distribution), page 16-1.

   - **Support Site**: The support site where the resource works. This is one of the

Territory Manager matching attributes (qualifiers) that can be used exclusively for the assignment of tasks.

The support site is nothing but a site for the Oracle Trading Architecture (TCA) organization party providing the service. You must set up each support center as a separate TCA party site for the party. You can set up the support sites by creating parties in the Contact Center and with addresses (sites).

- **Cost Per Hour**: Not used.
- **Primary Language**: Not used.

  Oracle Territory Manager can assign resources on the basis of a customer's preferred language, but the match is made based on the competencies recorded in the employee record.
- **Secondary Language**: Not used.

7

Basic Service Request Setups

This chapter covers the following topics:

- Setting Up Business Processes
- About Statuses, Status Groups, and Service Request Types
- Setting Up Service Request Statuses
- Setting Up Status Groups
- Setting Up Service Request Types
- Grouping Service Request Types into Categories for Oracle iSupport
- Setting Up Service Request Severities
- Setting Up Service Request Urgencies
- Setting Up Problem Codes
- Setting Up Resolution Codes
- Setting Up Default Response and Resolution Times
- Setting Up Task Types and Priorities for Service Request Tasks
- Setting Up New Note Types for Service Requests and Tasks
- Indexing Note and Summary Text for Searches
- Enabling Integration with Oracle Enterprise Asset Management
- About Oracle Workflow Processes Included with Your Application
- Setting Up the List of Values for the Language Field
- Obtaining a List of Valid System Profiles and Lookups

Setting Up Business Processes

Business processes are required for setting up the default service level agreement, Oracle Service Contracts' coverage templates, and for Charges.

To setup business processes:

1. Under the Service responsibility, navigate to Setup, then Charges, and select Service Business Process.

   The Service Business Process window appears.

2. Enter a name and optional description.

3. Specify the applications where you wish this business process to be visible by selecting the appropriate check boxes:

   - **Depot Repair:** Oracle Depot Repair
   - **Field Service:** Oracle Field Service
   - **Service Request**: Oracle TeleService (all modules).

4. If you are using Charges, you must also associate service activities to the business process in the Service Activities region. See Setting Up Business Processes, Service Activities, and Billing Types for Charges, page 12-12.

5. Click **Save**.

About Statuses, Status Groups, and Service Request Types

This topic explains the various elements you use to model your service request business processes:

- Service Request Statuses, page 7-2
- Status Groups and Status Transitions, page 7-4
- Service Request Types, page 7-5
- Service Request Type Categories for Oracle iSupport, page 7-8

Service Request Statuses

Service request statuses provide a classification system you can use to track the stage of a response to a customer problem from the initial customer contact to its resolution.

The application provides the following seeded statuses:

- Cancelled by User
- Clear

- Closed
- Open
- Planned
- Waiting

However, you can set up any number of statuses appropriate for different types of customer problems.

For example, for billing problems you may want to include "Invoice Disputed", " Dispute Denied", and "Invoice Corrected", for equipment exchanges: "Received", "Fixed" , and "Shipped Back to Customer."

Statuses can also:

- Specify what service request updates are permissible

  You can specify if a user is permitted to update a service request in a specific status.

  For example, if you use Charges to bill customers for service and you calculate the amount to be billed only after work has been completed, then you may want to permit agents working on "Open" service requests to update the information about the customer problem, but not the charges. When the work is completed and the service request has the status of "Closed", then you may want to bar agents from updating the problem information, but permit them to modify the charges.

- Indicate the service request is responded to or resolved and automatically fill in the date and time in the Responded On or Resolved On fields.

- Indicate a service request is on hold.

  This is important if you are implementing automatic work distribution where agents click the Next Work or Get New Work buttons to work on the most urgent service request. When an agent sets a service request to an on-hold status, the application ignores the service request when determining the highest priority service request. See Implementing Work Assignment and Distribution , page 16-1.

- Indicate a service request requires approval or an electronic signature.

  Extra setups are required, including the creation of special intermediate statuses the service request is set to while it is waiting for action. For details, see Electronic Approvals and Records, page 19-1.

- Alert an agent that a customer has replied to an e-mail sent regarding a service

  Integration with Oracle Email Center makes it possible for agents to send e-mails to customers in the context of the service request. The application stores the e-mails and any customer replies in the service request history. You can set up a special status (for example, "Email Received") that alerts agents that a new reply has

arrived in a service request. For details, see Enabling Oracle Email Center, page 17-1.

Service Request Status Groups and Status Transitions

Status groups make it possible for you to specify:

- Which statuses can be used for which problem
- Permissible status transitions
- Different behavior for different classes of users

Statuses for Specific Problems

By grouping your statuses in status groups and mapping them to different service request types, you can specify which service request statuses are going to be available for which customer problem.

For example, a status of "Invoice Corrected" makes sense as a status of a service request for a billing question and "Repaired" as a status for inhouse equipment repairs, but not vice versa.

Permissible Status Transitions

Status groups also make it possible for you to specify the permissible status transition rules for each status in the group (which statuses can be set to which).

You specify the initial status of the service request when agents or customers create it and the transition rules that determine what statuses agents or customers can choose for a service request of a given status.

For example, all new service requests get the initial status of "New", but you do not want to permit agents to reset a service request back to "New" after it has already been worked on. You may not want to permit agents to turn a "Closed" service request back to "Open" because the work is already completed.

> **Note:** Status transition rules govern only which statuses users can select, they do not determine whether the information in the service request can be updated or not. You determine whether users can modify information when you set up the statuses themselves.

Different Behavior for Different Users

By creating multiple status groups with different status transition rules and mapping them to different responsibilities, you can reserve certain actions only for designated users.

For example, if you want to permit only agent supervisors to close service requests of type Refund. In this case you:

1. Create a status group for the agents that does not permit a transition to the "Closed" status.

2. Create a status group for the supervisors that permits the transition to "Closed."

3. Map the agent status group to the agent responsibility and the service request type Refund.

4. Map the supervisor status group to the supervisor responsibility and the service request type Refund.

See About Mapping Status Groups to Service Request Types and Responsibilities, page 7-7.

Service Request Types

Agents use service request types to categorize the service request.

If you have implemented Oracle iSupport, then customers themselves can also use service request types to categorize their problems when they create a service request on the Web.

Examples of service request types include:

- Request for Information
- Customer Complaint
- Billing Issue
- Installation Request
- Preventive Maintenance Visit
- Return
- Depot Repair

You can set up service request types to:

- Channel different types of customer problems and inquiries to different groups in your organization

  This is accomplished by associating service request types with different responsibilities. For example, you can restrict only accountants to viewing and updating billing service requests and service organizations to restrict access to Installation Requests to the field service organization.

- Provide data security

  Responsibility to service request type mappings provide data security not just for the service request information itself, but also for all related information including service request tasks, notes, and interaction history.

  Agents that are barred from using a service request type cannot view or modify any service request related information.

- Restrict agents to using appropriate problem and resolution codes

  Problem codes and resolution codes provide agents with a quick and consistent way of classifying customer problems and resolutions. You can specify which codes map service request types to problem codes and resolution codes to restrict selection to those appropriate to the problem.

- Automatically create tasks when a service request is created

  You can use service request types along with Problem Codes, Items, and Item Categories to generate tasks that must be performed to resolve the customer problem. The agents or dispatchers assign these tasks to engineers who will do the work.

- Capture additional information about a customer problem

  You can set up service request types to capture additional information you may need to resolve the customer problem.

  For example, a government agency receiving a call about an abandoned vehicle must capture the make, model, color, and the license plate number so the towing service knows which vehicle to tow away and what tow truck to send to do the job.

  Based on the information entered, the application can automatically create different tasks and check if the new service request is a duplicate.

  The application provides two different and incompatible methods of capturing additional service request information. The appropriate method depends on the application module you are setting up:

  - If you are using the Contact Center (Oracle Forms) to capture the additional information use the method described inCapturing Additional Service Request Attributes in the Contact Center, page 40-1.

  - For all other modules, including Case Management, use the method described inCapturing Additional Service Request Information with Extensible Attributes, page 45-1.

- Launch Oracle Workflow processes

  Each service request type can be linked to an Oracle Workflow process that can be automatically launched when agents create or update a service request of this type.

- Specify different response and resolution times

  Service request types are mapped to specific business processes. Each business process permits you to specify different response and resolution times either through individual service contracts created in Oracle Service Contracts or through the default service level agreement (SLA) you set up as part of your service application implementation (See Setting Up Default Response and Resolution Times, page 7-34).

- Enable integration with Oracle Enterprise Asset Management

  You can specify a service request type to display Enterprise Asset Management work orders in service requests.

- Specify type of electronic record you want to generate

  If you are implementing Oracle E-Records to capture electronic records you can set up each service request type to capture either a detailed record or an abbreviated record. See Electronic Approvals and Records, page 19-1.

About Mapping Status Groups to Service Request Types and Responsibilities

After you set up status groups, you must specify where they are to be used by mapping them to service request types.

You can do this in one of two ways:

- If all users of that service request type are going to be using the same status group, then you can map the service request group directly to the service request type on the Service Request Type window. (See Setting Up Service Request Types, page 7-14.)

- To specify different status groups for different classes of users, you must map the status groups to a combination of the service request type and the responsibility. This is accomplished using the Service Responsibility Setup page (Setup, then Mapping, then select Responsibility Mapping). See Mapping Responsibilities to Service Request Types and Status Groups, page 10-6.

About Final Statuses Aborting Existing Oracle Workflow Processes

You can set up a service request to automatically launch a workflow whenever an agent creates or updates it. Because each update launches a new instance of the workflow, each service request can have multiple instances of the workflow running at the same time. (For details about associating workflows to service request types, see Setting Up Service Request Types, page 7-14.)

If a workflow is running and an agent sets the service request to a status you flag as Final, then the application takes one of two possible actions:

- Warns the agent with a message that an instance of the workflow is running and permits the agent to terminate the workflow by clicking a button in the message text.

- Aborts any instances of the workflow automatically without warning the agent.

To automatically abort the workflow without the warning messages, you must select the Abort Workflow on Final Status without Warning check box in the Service Request Type window. If you don not select this check box, then agents always receive a warning.

Service Request Type Categories for Customers Using Oracle iSupport

You can make it easier for customers logging in to their Oracle iSupport portal to select the correct service request type by classifying service request types into categories. For example, by creating different categories for product problems and for order problems you shorten the lists of service request types a customer or agent must choose from and increase accurate classification of a problem.

You can upload images customers can use as visual cues to identify the categories on their screen. A printer icon may represent the printer service request type category and a currency symbol the invoice category, for example.

Any service request types you do not map to a category appear for Oracle iSupport users under the heading Other.

If you restrict access to service request types by mapping them to Responsibilities, the category appears as long as the Responsibility has access to at least one of the service request types in the category.

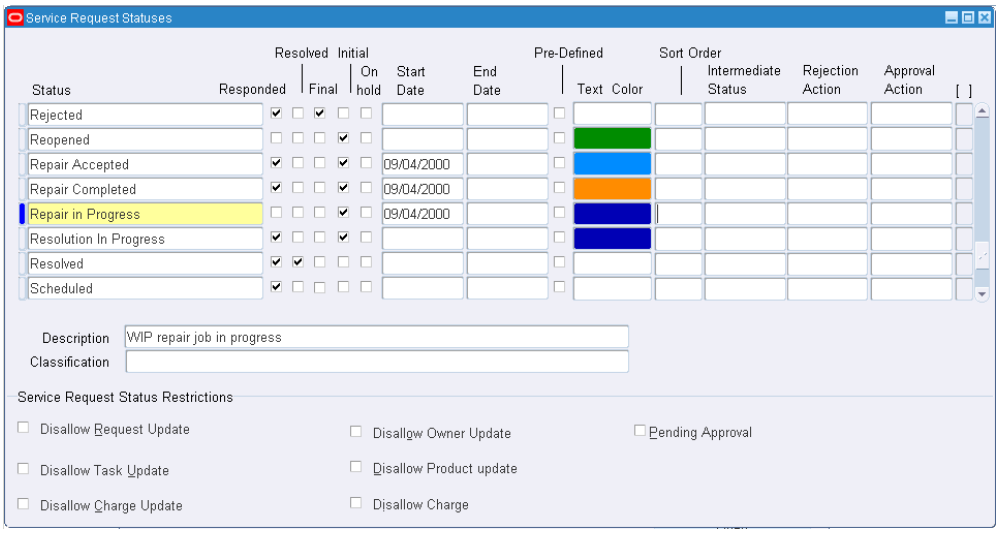
Setting Up Service Request Statuses

Use this procedure to set up service request statuses. The status of a service request tracks the status of a customer problem from the initial customer contact to resolution and controls the information a service request can be updated. For details, see Service Request Statuses, page 7-2.

To set up a service request status:

1. Under the Service responsibility, navigate to Setup, then Definitions, then select Service Request Statuses.

   The Service Request Statuses window appears.



2. Enter a name in the Status field. The text you enter here is what is displayed in the Status List of Values (LOV) in the Service Request window.

3. By selecting the Responded check box, you can set a status to automatically fill in the date and time in the Responded On field of the service request. The date and time reflect the time the agent sets the service request to this status.

4. By selecting the Resolved check box, you can set a status to automatically default the date and time in the Resolved On field of the service request if the agent has not done so manually. The date and time reflect the time the agent sets the service request to this status.

5. Select the Final check box if you want the application to:

   - Enter the date in the Closed field of a service request set to this status.

     The Closed field appears in the Service Request window header.

   - Terminate any instances of the workflow you have associated with the service request of that type in the Service Request Type window. For more information see About Final Statuses Aborting Existing Oracle Workflow Processes, page 7-7.

6. To use a status as the initial status of a service request, select the Initial check box. It is better that you map different service requests types to have a different initial statuses. For example, you may designate a service request created by a customer using Oracle iSupport as "Opened by customer" and a service request opened by service agent in the Service Request window as "New".

   Note: You cannot designate as initial any of the triggering or

intermediate statuses used for enabling e-record and e-signature capture.

7. If you are using automatic work distribution to deliver the next service requests to an agent, then you may wish to designate a status as on hold by selecting the On Hold check box. An on-hold status indicates that work on the service request is temporarily suspended because an agent is waiting for more information from the customer or for spare parts to become available, for example.

   Automatic work distribution permits agents to request the next most urgent piece of work from the Universal Work Queue by clicking the Next Work button.

   Placing a service request on hold excludes the service request from the pool of work evaluated by the application when the agent requests the next highest priority work item.

   Without an on-hold status, the application delivers the same service request over and over again if it happens to be the item with the highest priority.

   For more information, see Implementing Work Assignment and Distribution, page 16-1.

8. Select the Include in Duplicate Checking check box to include the status in the Status list on the Automatic Status Updates Rules page. This status can be used for identifying duplicate service requests.

9. Using the Classification list, you can classify each status as:

   - Waiting on Customer
   - Waiting on Support
   - Waiting on Internal Group
   - Waiting on External Group

     HTML-based Service and Case Management modules display this classification on the Agent Dashboard for every service request in agent queues (Waiting On field). The application also uses the classifications to calculate agent and group performance displayed in the Key Performance Indicators region. See Understanding and Setting Up Key Performance Indicators, page 44-3.

10. Optionally, enter Start and End dates for the status to restrict status use. By specifying a future start date you can delay the use of a new status. You can inactivate a status by setting an end date.

11. A check mark in the Predefined check box indicates the status was predefined by Oracle. You cannot delete a predefined status, but you can modify its wording or

remove it from use by entering an end date.

Oracle includes the following predefined statuses:

- Cancelled by User
- Clear
- Closed
- Open
- Planned
- Waiting

12. For the Oracle Forms-based Service Request window, you can use the Text Color field to assign a color to the text the support agent sees in the Status field of the service request.

13. To restrict users from updating certain types of information, select one or more of the Service Request Status Restriction check boxes:

    - Disallow Request Update: Prevents users from updating the service request. Selecting this check box does not affect Customer Support, Service Desk, and Case Management except when the prohibition is required by an electronic approvals process (See Electronic Approvals and Records, page 19-1.)
    - Disallow Task Update: Prevents users from updating tasks related to the service request in the Service Request window. (Tasks can still be modified from the Oracle Task user interface.)
    - Disallow Charge Update: Prevents users from updating charges.
    - Disallow Owner Update: Prevents users from updating service request ownership.
    - Disallow Product Update: Prevents users from updating product information.
    - Disallow Charge: Prevents users from entering charges information.

    Note: The Intermediate status and Rejection status fields as well as the Pending Approval check box are used only for setting up approvals and electronic signatures using Oracle E-Records. See Electronic Approvals and Records, page 19-1.

14. Save your changes.

15. Repeat the above procedure for all the statuses you need for all of your service request types.

    You are now ready to group the statuses you have created into Status Groups specific to each service request type according to the procedure outlined in Setting Up Status Groups, page 7-12.

Setting Up Status Groups

You can use status groups to specify for each service request type:

- Which statuses can be used for service requests of a type
- The initial status for a service request
- The permissible status transition rules for each status in the group.

For an overview of status groups and their function see About Statuses, Status Groups, and Service Request Types, page 7-2.

Prerequisites

Before creating status groups, you must create the statuses by following the procedure outlined in Setting Up Service Request Statuses, page 7-8.

To set up status groups:

Under the Service responsibility, navigate to Setup, then Rules, and select Status Groups and Transitions.

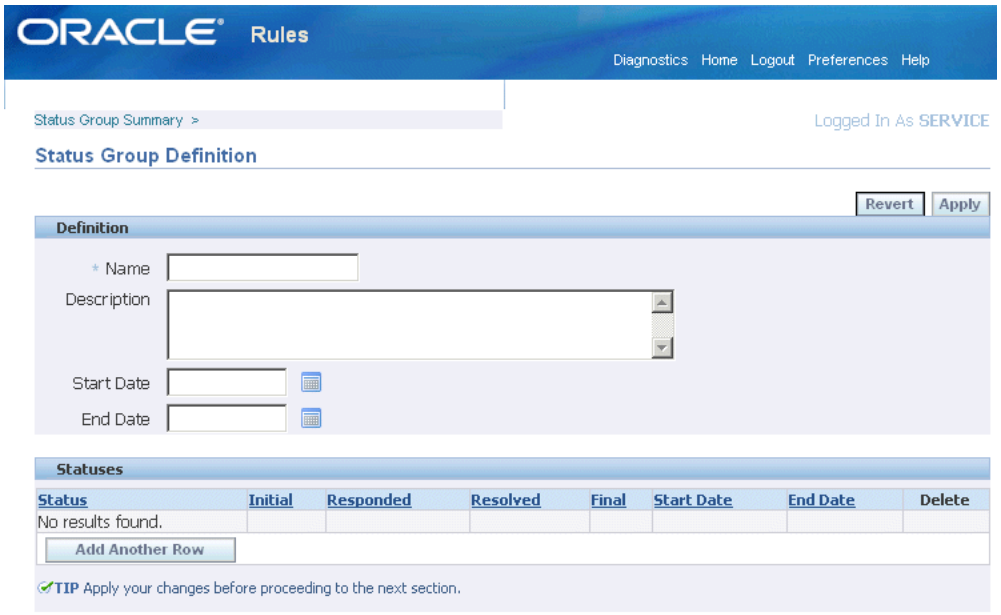
The Status Group Summary page lists status groups that have already been set up and provides the launching point for updating, copying, and creating status groups and their transitions.

Notes:

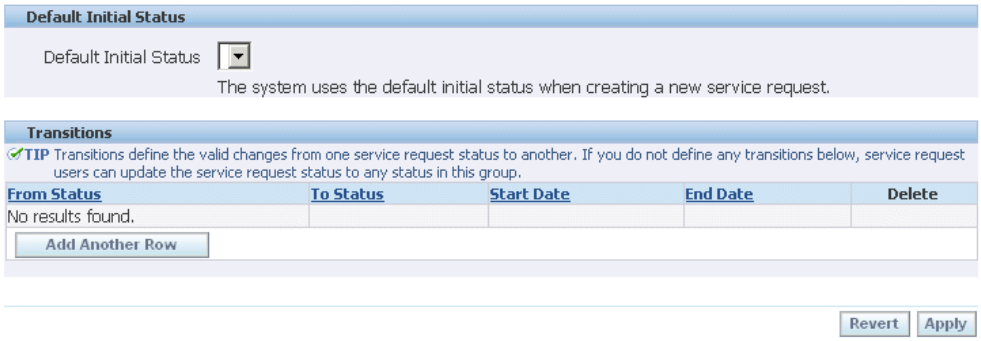
- You can either create a group by clicking **Update** or copy and modify an existing group by clicking **Duplicate** (the icon showing two sheets of paper).
- The Status Group Definition you use to create status groups is divided into four regions.

  Note: You must scroll down to view all regions.

- Use the first two regions on the page to specify the status group name and add the statuses.



You must specify the default initial status for a service request type using this status group, and define the permissible status transitions at the bottom of this page.



- You must add all statuses and click **Apply** to save your work before selecting the default initial status or entering transition rules.

- You can only select a status as an initial status if it has been set up as an initial status in the Service Request Statuses window.

  Note: If you are automatically closing duplicate service requests using the status update feature offered by service request relationships, then you must include the seeded status of "Waiting", "Clear", and "Closed" and the status group transition rules must permit all statuses to transition to the status of "Closed". See Service Request Linking to Specify Duplication and Other Relationships,

page 8-1.

- Select a task template for all statuses. The Service: Auto Task Generation on Service Request Status Transitions profile controls whether the task template is used to create new tasks when the service request status transitions from one status to another. By default, the value is set to No. If the value is set to No, irrespective of what values are set in the task template column in the Status Group Definition page, auto tasks are not generated on status transition. If the profile option is set to Yes, then tasks are generated based on the task template value on the status transition is executed. You can select from any one of the following values:
  - **None** - No action is taken when the service request status changes.
  - **Task Template Mapping** - Task template is derived based on the problem code, service request type, item, and item category when the service request status changes.
  - **List of effective task template groups associated to document type of service request** - Task template groups associated with the document type of service request are alphabetically displayed.

    Note: If the "To Status" in the Status Group Definition page is in a status that has the "Disallow Request Update" check box selected, then tasks are NOT generated.

- Select a workflow for all statuses. The Service: Auto Launch Workflows on Service Request Status Transitions profile controls whether the workflow is launched on the status transition. By default, the profile is set to No. If the value is set to No, then workflows are not launched on status transitions. If the profile is set to Yes, then workflows, if specified, are launched on status transitions.

  Note: : In the Status Group Definition page, the Workflow LOV lists all workflows with item type of SERVEREQ

Setting Up Service Request Types

Use this procedure to set up service request types used by agents and customers to categorize service requests. For more information about service request types, see Service Request Types, page 7-5.

Prerequisites:

- You must create the object you want to link to the service request type. For

example, to link a service request type to a status group, you must first create the status group.

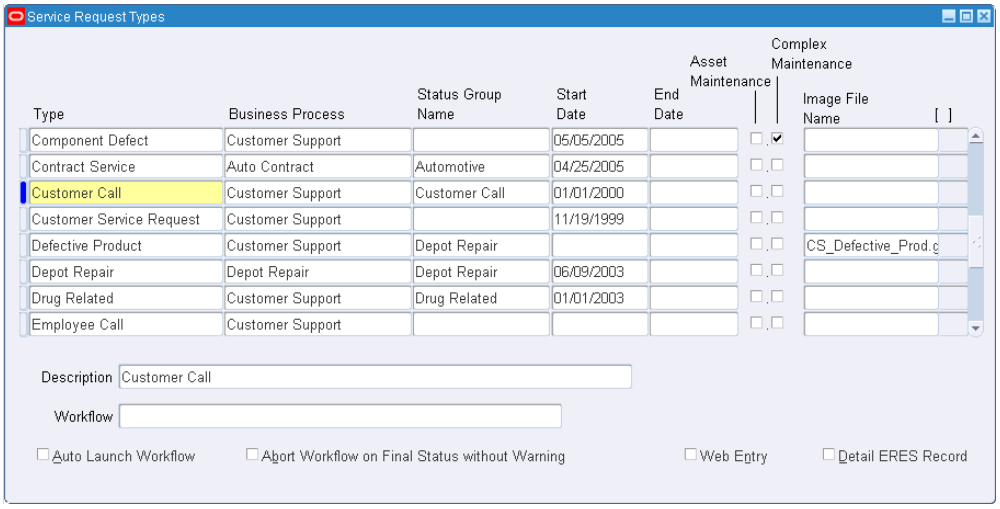
- If you create service requests for Oracle Install Base item instances, then you must create business processes the application uses to lookup customer entitlements in service contracts.

  You must create at least one dummy business process even if you do not use Oracle Service Contracts. This is because the application requires a business process to look up the default service agreement when an agent enters an Oracle Install Base instance in the service request.

To create a service request type:

1. Under the Service responsibility, navigate to Setup, then Definitions, then select Service Request Type.

   The Service Request Types window appears.



2. Enter a name of the service request type in the Type field. This is the text agents see in the Type list of values in the Service Request window.

3. If the service request type is going to be used for creating service requests for Oracle Install Base item instances (products the customer owns), then select a business process from the Business Process list of values. The business process supplies the response and resolution times specified in Oracle Service Contracts or in the default service level agreement.

4. Optionally, enter Start and End dates. By specifying a future start date you can delay the use of a new service request type. You can inactivate a type by setting an end date.

5. Enter a description for the service request type.

6. If you have set up a status group for this service request type, then select it using the Status Group Name list of values (LOV).

   Note: Use the mapping in a separate setup by using multiple status groups to specify different behaviors for different users. See About Mapping Status Groups to Service Request Types and Responsibilities, page 7-7. This alternate way of mapping status groups to service request types and responsibilities supersedes the mapping you make here.

7. To enable this service request type for use with Oracle Enterprise Asset Management, select the Asset Maintenance check box.

8. To enable the service request type for Oracle Complex Maintenance, Repair, and Overhaul, select the Complex Maintenance check box.

9. If the service request type is being used in Oracle iSupport, then you can display an image to help customers select the correct type during request creation.

   For example, a computer hardware company may present users with an icon of a printer for the Printer Trouble and an icon of a monitor for Monitor Trouble. To display the image, upload the image to APPL_TOP in the OA_MEDIA directory and enter the name in the Image File Name field.

10. Optionally, associate an Oracle Workflow process (of item type SRVEREQ) using the Workflow list of values (LOV). This can be a process you have created or one that is included with your application.

    Your application includes three predefined workflows, which are a part of the SRVEREQ item type and appear in the LOV (See About Oracle Workflow Processes Included with Your Application, page 7-39.):

    - **Duplicate Check and Autotask Create for iSupport and Email Center Created SR**

      Checks for potential duplicates when service requests are created in Oracle iSupport and Oracle Email Center.

    - **Call Support Process**

      Use this workflow only under special circumstances if you are using Oracle TeleService.

    - **Customer Support Event Process**

      Do not associate this workflow here. It is used by Oracle TeleService internally.

11. If you have associated a workflow, then select one or both of the related check boxes:

    - **Auto Launch Workflow:** Launches workflow automatically when a service request is created and updated.

    - **Abort Workflow on Final Status without Warning**: Selecting this check box aborts without warning any instances of the workflow you have associated with this service request type whenever an agent sets that service request's status to a status that is flagged as Final in the Service Request Statuses window. (See Setting Up Service Request Statuses, page 7-8.)

      If you do not select this check box, then the agent always receives a warning if a workflow is about to be terminated and has a chance to cancel the abort.

12. To make this service request type available to customers who are creating service requests on the Web using Oracle iSupport, select the Web Entry check box.

13. If you are implementing Oracle E-Records to capture electronic records, you can have the application capture a detailed e-record by selecting the Detail ERES Record check box. By default, the application generates an abbreviated record. See Electronic Approvals and Records, page 19-1.

14. Click **Save**.

15. If you have selected the Auto Launch Workflow check box for any service request type, then you must set the set the system profile Service: Auto Launch Workflow to Yes.

Grouping Service Request Types into Categories for Oracle iSupport

Create categories of service request types and include icons to make it easier for customers using Oracle iSupport to select the correct service request type for their problem. For more information, see Service Request Type Categories for Oracle iSupport, page 7-8.

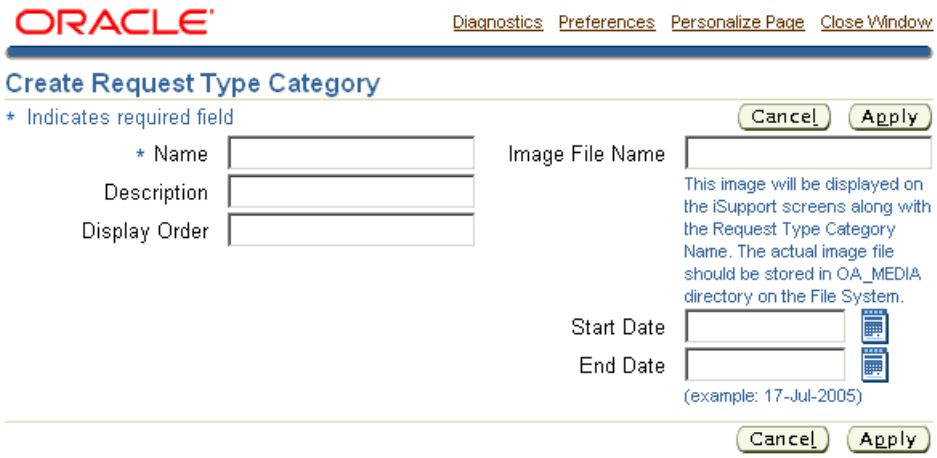
To create a category and map it to service request types:

1. Under the iSupport Administrator responsibility, navigate to Request Type Administration, then select Request Type Categories.

2. From the Request Type Categories Page, you can create new categories or modify existing ones. To create a category:

    1. Click **Create** on the Request Type Categories page.

       The Create Request Type Category page appears.



2. The category name, which displays in the customer's Web portal page, is the only mandatory field.

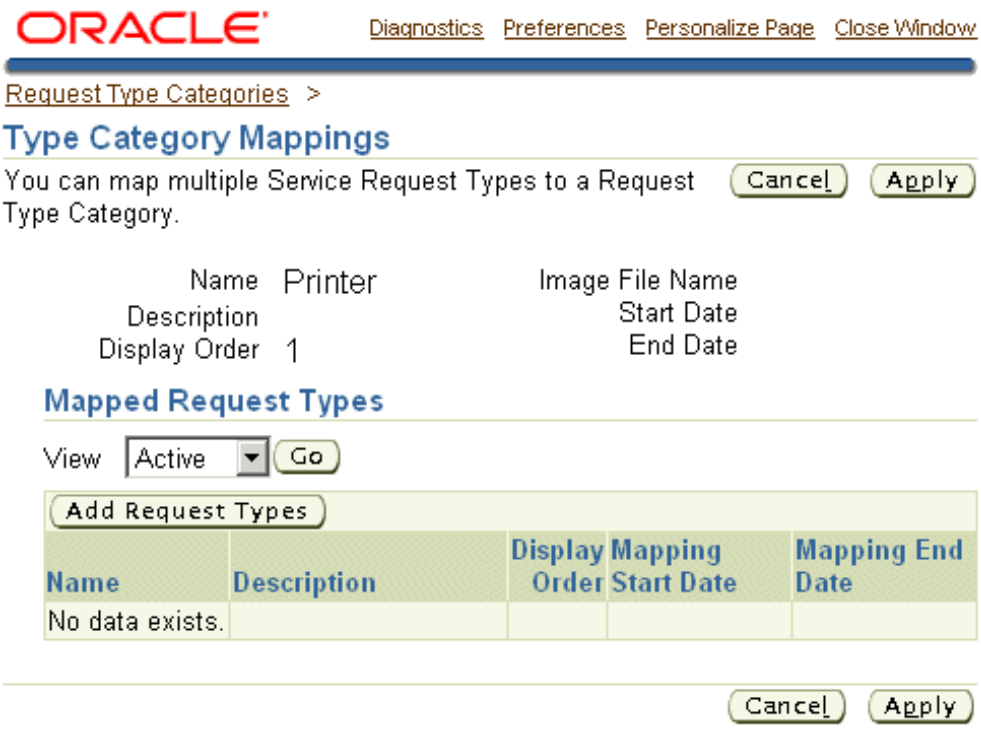
3. Enter a sequence number in the Display Order field to specify a specific order in which you wish the categories to appear in the list of values.

4. If the category you are creating is being used in Oracle iSupport, then you can display an image to help customers identify the category visually. To display the image, upload the image to APPL_TOP in the OA_MEDIA directory and enter the name in the Image File Name field. This image is not displayed in any of the Oracle TeleService modules.

5. Click **Apply**.

3. Click the Mapping icon.

   The Type Category Mappings page Appears.



4. Click **Add Request Types**.

5. On the Search page, you can select multiple service request types to map at the same time, so you can display them all by using the "%" sign in the Search field.

6. Click **Select** to return to the Type Category Mapping page.

7. You can specify an order for the way the service request types appear in the list of values by entering numbers in the Display Order field.

8. Click **Apply**.

Setting Up Service Request Severities

You define service request severities to assist in setting service request priority. The service request severity reflects the support agent's perception of the reported service request. Service request severity is a mandatory field in the service request.

Following are some examples of service request severities:

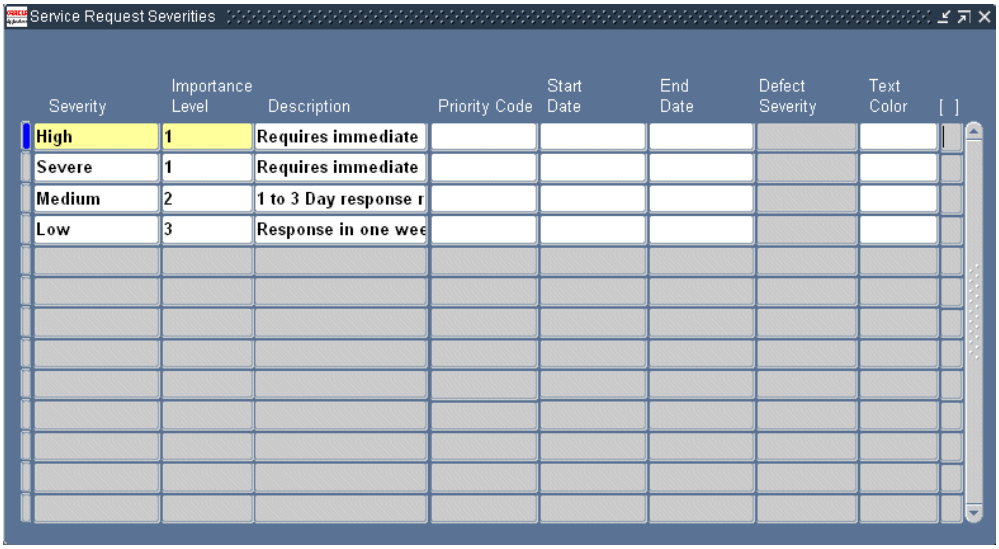
- High
- Medium

- Low

To set up a service request severity:

1. Under the Service responsibility, navigate to Setup, then Definitions, then select Service Request Severities.

   The Service Request Severities window appears.



2. Enter a severity name in the Severity field in the header of the Service Request window.

3. Enter a numerical value in the Importance Level field. The importance level indicates the importance of this particular severity with respect to other defined severities.

   If you are implementing automatic workload balancing for automatic work assignment, then you must group the severities into four categories: 1 through 4, where 1 are the severities of the highest priority and 4 are those with the least priority. See Implementing Service Request and Task Assignment, page 16-1.

4. Enter an optional description of the severity.

5. If you are enabling automated work distribution, where agents assign work to themselves in the Universal Work Queue using the Get Work and Next Work buttons, then you must use the Priority Code list of values (LOV) to select one of the four priorities: critical, high, medium, or low.

   The application uses the priority you enter here together with the service request due date to calculate the most urgent work item to assign to agents when they click the Get Work and Next Work buttons.

The Priority Code maps onto the Global Priority Levels in the Universal Work Queue.

For more information on automatic assignment topics, see Implementing Service Request and Task Assignment, page 16-1.

6. Optionally, enter Start and End dates to control the use of severities. By specifying a future start date you can delay the use of a new severity. You can inactivate a severity by setting an end date.

7. Optionally, select a text color in the Text Color field to display the severity in this color on the Service Request window.

8. If a descriptive flexfield is enabled for this form, select the appropriate values.

9. Save.

10. Set up the severity you want to use as a default by setting the system profile Service: Default Service Request Severity at the site level. This setting is required if you are creating service requests using the actions architecture on the Contact Center Install Base tab.

Setting Up Service Request Urgencies

You define service request urgencies to provide an indicator of the customer's perception of the urgency of the service request. Urgency is an optional field in service requests.

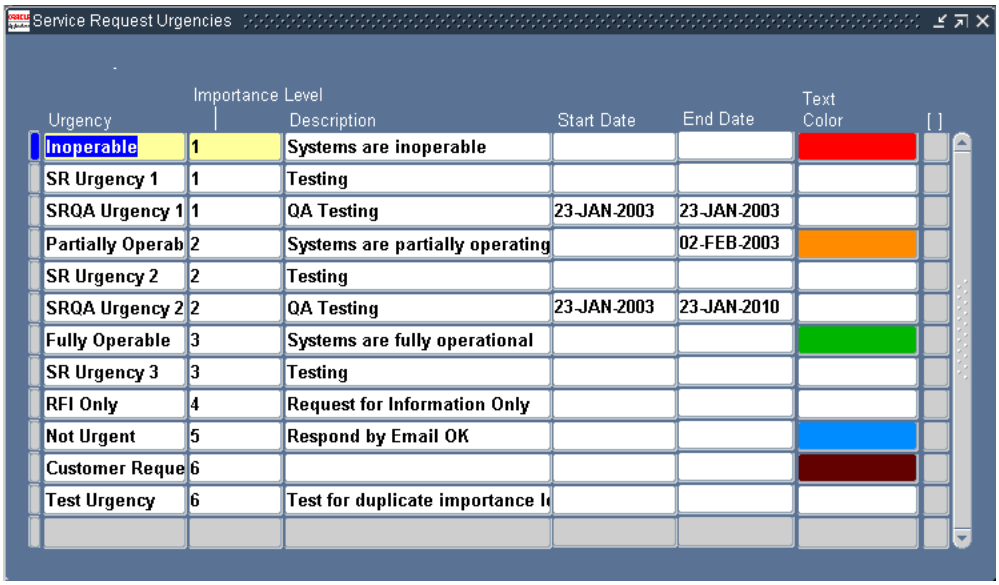
Following are some examples of service request urgencies:

- Inoperable
- Partially Operable
- Not Urgent

To set up service request urgencies:

1. Under the Service responsibility, navigate to Setup, then Definitions, then select Service Request Urgencies.

   The Service Request Urgencies window appears.



2. Enter an urgency name in the Urgency field. The urgency name appears in the Urgency list of values in the service request.

3. Enter a numerical value in the Importance Level field. The importance level indicates the importance of this particular urgency with respect to other defined urgencies. You can have multiple urgencies with the same importance level.

4. Optionally, enter a description and Start and End dates (to control the availability of urgencies).

5. For Forms based interfaces you can select a text color using the Text Color field list of values.

6. If a descriptive flexfield has been enabled for this form, select the appropriate values.

7. Save your service request urgency.

Setting Up Problem Codes

About Problem Codes

Service request problem codes provide service agents with a standard way to classify customer requests.

For example:

- Hardware Problem

- Software Problem
- Shipping Damage

Agents can enter one problem code per service request using the Problem Code list of values. Entry is optional by default.

Problem codes are implemented using the standard Oracle Applications lookup code of type REQUEST_PROBLEM_CODE. The associated lookup codes are user definable.

> **Note:** The Case Management module uses problem codes as Issue Types.

About Problem Code Mapping

Because the list of all problem codes can be large, you can use the procedures in this section to narrow an agent's choice to only those problem codes that are appropriate to each customer problem. You can do this by mapping problem codes to service request types, inventory items (individual items or categories), or a combination of the two.

> **Note:** You can map a problem code to multiple objects.

For example, if you have customers calling in with billing questions or computer hardware problems, then you may wish to map the available problem codes to the two Service Request Types to prevent an agent from accidentally making the wrong problem code entry. You do not want an agent to enter "Incorrect labor rate" in a service request about a faulty hard drive, for example, or "Replacement needed" for a billing question.

You can restrict the use of problem codes further by inventory item category to prevent an agent from using the wrong problem code for a particular product, for example, using "New battery required" for a service request that involves the replacement of the hard drive.

If you do not create a mapping for a problem code, agents can use it in any service request.

You can map problem codes to the following valid permutations:

- A Service Request Type alone
- An inventory item alone
- An inventory item category alone
- A Service Request Type and an inventory item
- A Service Request Type and an inventory item category

Suppose you create eight problem codes, A through H, and two mappings, for example:

- **Mapping 1**: Problem codes A, B, and C to Service Request Type T1
- **Mapping 2**: Problem codes D and E to T1 and inventory item P1

You leave problem codes F, G, and H unmapped.

Here are the available problem codes for an agent creating a service request:

- If an agent does not enter either Service Request Type T1 or product P1, then the available problem codes are limited to the unmapped problem codes F, G, and H.
- Agents entering item P1 with different Service Request Types are also limited to the unmapped problem codes.

  There is no mapping defined for item P1 alone, so entering the item without the Service Request Type T1 does not make any difference.
- If the agent selects Service Request Type T1 but does not enter the item P1, then the available problem codes are: A, B, and C as well as the unmapped problem codes F, G, and H.
- If the agent selects type T1 and item P1, then the available problem codes are: A, B, C, D, and E as well as the unmapped problem codes F, G, and H.

  A, B, and C are valid for Service Request Type T1 and all inventory items.

  D and E are valid for the T1 and P1 combination.

Defining Service Request Problem Codes

Use this procedure to define problem codes.

Prerequisites:

If you plan to use a large number of problem codes in your organization, you can restrict agents to seeing only those problem codes that are relevant to the customer problem they are resolving. This is accomplished by mapping problem codes to Service Request Types, items, and item categories. If you plan to create the mappings, you should plan them out before creating the problem codes. See Restricting the Use of Problem Codes, page 7-22.

1. Under the Service responsibility, navigate to Setup, then Definitions, and select Problem Codes.

   The Oracle Service: Service Request Problem Codes Lookups window appears displaying all problem codes.

2. Enter a problem code in the Code field.

3. Enter a meaning. A meaning is a brief description of the code.

4. Optionally, enter a full description of the code in the Description field.

5. Optionally, enter Start and End dates to control the use of problem codes. By specifying a future start date you can delay the use of a new problem code. You can inactivate a problem code by setting an end date.

6. The Tag field is not used for problem codes.

7. Select the Enabled check box to make the code available for use.

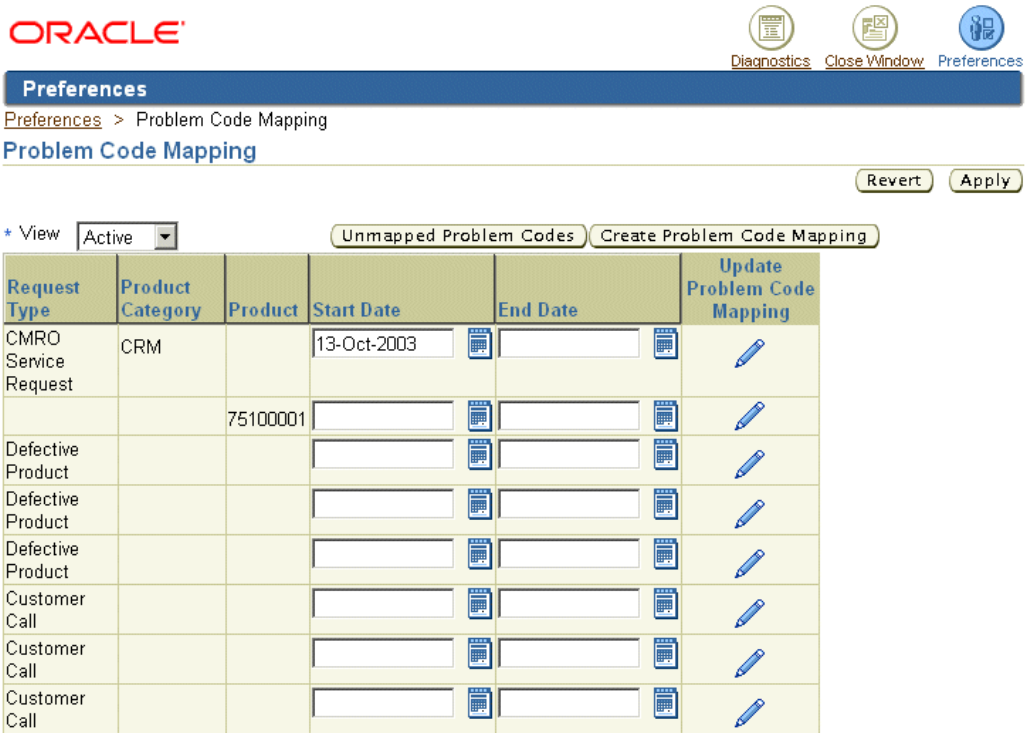
8. Optionally, enter the descriptive flexfield, if defined.

9. Save your problem code.

10. After you complete entering your problem codes, you are ready to restrict their use by mapping them to Service Request Types, inventory items, and item categories. See Mapping problem Codes, page 7-25.

Mapping Problem Codes

You create and edit problem code mappings from the Problem Code Mapping page available by navigating under the Service responsibility to Setup, Mapping, Problem Code Mapping.



Notes:

- For an explanation of problem code mapping see About Problem Code Mapping, page 7-23.

- You can create a mapping in one of two ways:

  - You can view a list of unmapped problem codes and select those you want to map by clicking **Unmapped Problem Codes**.

  - If you know the codes you want to map, create the mapping directly by clicking **Create Problem Code Mapping**.

    See Creating a New Problem Code Mapping, page 7-27.

- When updating an existing mapping, you cannot update the mapping criteria, only the list of mapped problem codes.

- To disable a particular mapping or make it available only at a future time, enter a date in the End Date or Start Date fields and click **Apply**. End dating a mapping is useful if you have made an error in your setup as it frees up mapped problem codes for reuse.

- You can restrict the display of existing mappings by making a selection from the View list:

- **Active**: to view all mappings in effect. This is based on the start and end dates.
- **All**: to view all current, planned, and end dated mappings.
- **Planned**: to view only mappings that have a future start date.

Creating a New Problem Code Mapping

Use this procedure to create a new problem code mapping. You can reuse the same problem code for multiple mappings.

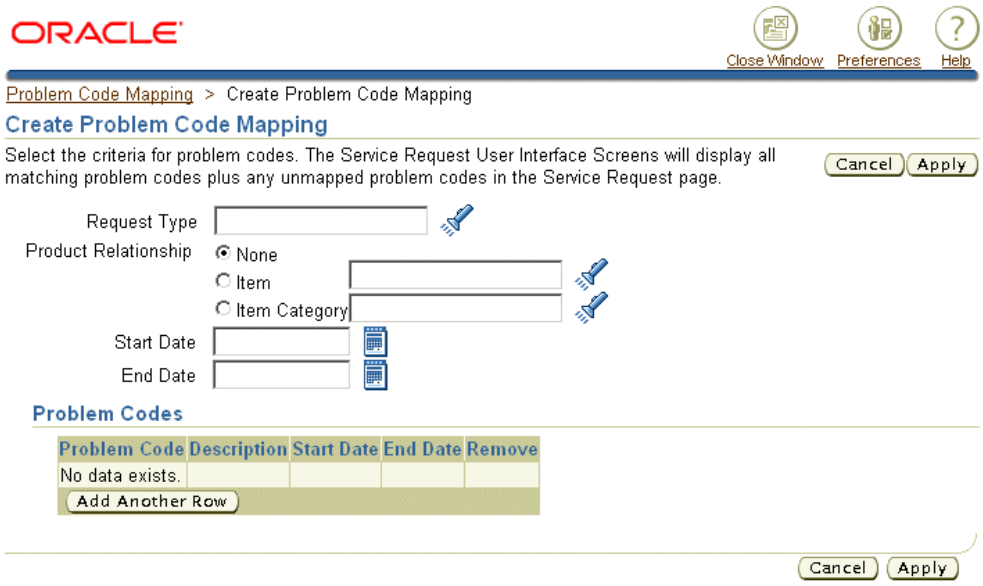
Prerequisites:

- You must first set up Service Request Types, problem codes, inventory items, and item categories.
- Display existing mappings by navigating to Setup, then Mapping, and select Problem Code Mapping under the Service responsibility.

1. On the Problem Code mapping page, click **Create Problem Code Mapping**.

   Note: To view unmapped codes first, click **Unmapped Problem Codes**.

   The Create Problem Mapping page appears.



2. Select the object or combination of objects you wish to map. You can map problem codes to a Service Request Type alone or in combination with either an item or an item category:

   - To map problem codes to a Service Request Type, select the type using the Request Type list of values (the flashlight icon).

   - To map to an inventory item or an item category, select either the Item or the Item Category option and use the list of values to make your selection.

3. Select any problem codes you wish to map using **Add Another Row**.

   Note: The list of all problem codes includes those that are already mapped. If you accidentally select a mapped code, an error is displayed when saving this mapping.

4. Click **Remove** before you save the mapping to remove the mapped codes.

5. Click **Apply** when you are done.

Setting Up Resolution Codes

About Resolution Codes

Resolution codes provide a uniform way for agents to specify how a service request is resolved. For example:

- Unit Replaced
- Patch Sent
- Documentation Sent

Agents can enter one resolution code per service request using the Resolution Code list of values. By default, the resolution code is optional.

Resolution codes are implemented using the standard Oracle Applications lookup code of type REQUEST_RESOLUTION_CODE. You can define the lookup codes using the procedure outlined in Setting Up Service Request Resolution Codes, page 7-30.

About Mapping Resolution Codes

You can specify which resolution codes are relevant to which service requests by mapping resolution codes to problem codes, service request types, inventory items (individual items or categories), or a combination of the three.

Note: You can use the same resolution code in multiple mappings.

You can map resolution codes to the following valid permutations:

- A service request type
- An inventory item
- An inventory item category
- A problem code
- A service request type and an inventory item
- A service request type and an inventory item category
- A service request type and a problem code
- An inventory item and a problem code
- An inventory item category and a problem code
- A service request type, an inventory item, and a problem code
- A service request type, an inventory item category, and a problem code

For example, if customers report problems with computer hard drives from different manufacturers, you can create separate resolution codes for each manufacturer and map them to a combination of problem code and manufacturer (represented by inventory item categories). This way you ensure agents select the correct resolution

code.

Suppose you have three brands of hard drives Toshiba HD, IBM HD, and Seagate HD. You can create three resolution code mappings described in the following table:

Mapping	Problem Code	Item Category	Mapped Resolution Codes
Mapping 1	Hard Drive Failed	Toshiba HD	• Replaced Drive T • Repaired Drive T • Reformatted Drive T
Mapping 2	Hard Drive Failed	IBM HD	• Replaced Drive IBM • Repaired Drive IBM • Reformatted Drive IBM
Mapping 3	Hard Drive Failed	Seagate HD	• Replaced Drive S • Repaired Drive S • Reformatted Drive S

This mapping ensures that agents select the correct resolution code for each hard drive make.

Agents can use unmapped resolution codes in all service requests.

Setting Up Service Request Resolution Codes

Use this procedure to set up resolution codes.

1. Under the Service responsibility, navigate to Setup, then Mapping, and select Resolution Code Mapping.

   The Service Request Resolution Codes window appears displaying any existing resolution codes.

2. Enter the resolution codes:

    1. Click **New** in the toolbar.

    2. Enter a single word as the code in the Code field. This is for internal use by the application.

    3. Enter the wording you wish agents to see in the list of values in the Meaning field.

    4. Optionally, enter a description in the Description field.

    5. You can restrict the availability of the code using the start or end dates.

    6. The Tag field is not used for resolution codes.

    7. Select the Enabled check box to make the code available for use.

    8. Optionally, you can enter a descriptive flexfield, if one has been set up for this purpose.

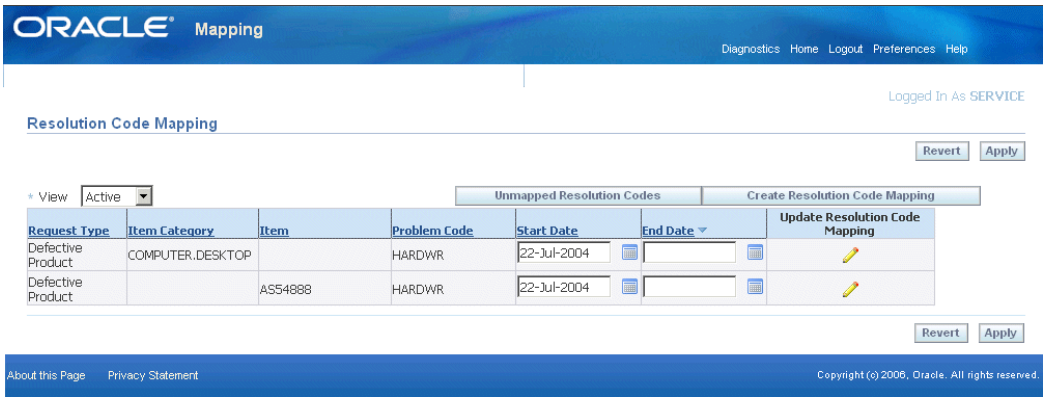
3. Click **Save** .

4. If you plan to use a large number of resolution codes in your organization, you can restrict agents to seeing only those that are relevant to the customer problem by mapping the resolution codes to problem codes, service request types, items, and item categories. See Mapping Resolution Codes, page 7-31.

Mapping Resolution Codes

You can restrict the use of resolution codes by mapping them to service request types, product categories, products and problem codes.

You create and the mappings from the Resolution Code Mapping page available under the Service responsibility by navigating to Setup, Mapping, Resolution Code Mapping. The procedure for mapping resolution codes is the same as for problem codes.



Notes:

- You can create a mapping in one of two ways:
  - Click **Unmapped Resolution Codes** to view a list of unmapped resolution codes and select those you want to map.
  - Click **Create Resolution Code Mapping** to create the mapping directly, if you know which codes you want to map.

    See Creating a New Resolution Code Mapping, page 7-32.

- When updating an existing mapping, you cannot update the mapping criteria, only the list of mapped resolution codes.
- You can control the availability of the mapping using the End Date or Start Date fields. Setting an end date for a mapping is useful if you have made an error in your setup as it frees up mapped resolution codes for reuse.
- You can restrict the display of existing mappings by making a selection from the View list:
  - **Active**: to view all mappings in effect.
  - **All**: to view all current, planned, and mappings, which have reached their end date.
  - **Planned**: to view only mappings that have a future start date.

Creating a Resolution Code Mapping

Use this procedure to create a resolution code mapping.

Prerequisites:

- You must first set up service request types, problem codes, resolution codes,

inventory items, and item categories.

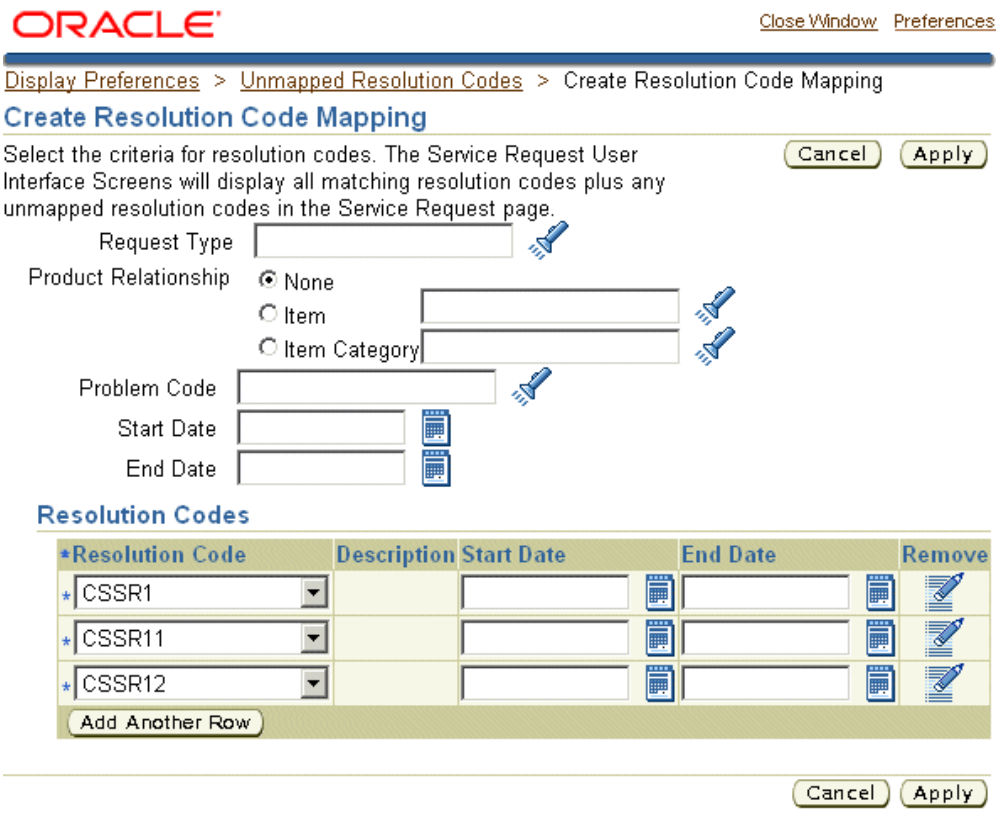
- Display existing mappings by navigating to Setup, Mapping, Resolution Code Mapping under the Service responsibility.

1. You can create a mapping in one of two ways:

   - Click **Unmapped Problem Codes** by selecting problem codes from a list of unmapped codes.

   - Click **Create Problem Code Mapping** if you know which codes you want to map.

     The Create Resolution Code Mapping page appears.



2. Select the object or combination of objects you wish to map:

   - To map resolution codes to a service request type, select the type using the Request Type list of values (the flashlight icon).

   - To map an inventory item or an item category, select either the Item or the Item Category option and use the list of values to make your selection.

- To map a problem code, select it.

3. To limit the availability of this mapping, enter dates in the Start Date and End Date fields.

4. Enter any additional resolution codes you wish to map. For each code:

    1. Click **Add Another Row**.

    2. Select the code using the Resolution Code list.

        Note: The list of all resolution codes includes those that are already mapped. If you accidentally select a mapped code, an error message is displayed when you save the mapping.

5. Click **Remove** to remove any mapped code. You can remove codes only before you save the mapping.

6. Click **Apply**.

Setting Up Default Response and Resolution Times

Use this procedure to set up default service request response and resolution times by business process and service request severity.

Service request types are mapped to specific business processes. Each business process permits you to specify different response and resolution times either through individual service contracts created in Oracle Service Contracts or through the default service level agreement you set up as part of your service application implementation.

When agents create a service request not covered by a contract, the application uses the default resolution and response times for the business process to calculate the deadlines for responding and resolving the service request and automatically sets the default Respond By and Resolve By dates.

The SLA is calculated based on the value specified in the Service: Date to Calculate SLA profile option, and either the reported date or the date on which the service request is created.

If an agent later selects a contract for the service request or enters an install base item covered by a contract, these default times get overwritten by those specified in the contract.

To set up default response and resolution times:

1. Set up an Oracle Service Contract coverage template with the reaction times and resolution times for each business process and service request severity as described

in the *Oracle Service Contracts User Guide*.

> **Note:** The template you create is for setting up default reaction times and resolution times only. It cannot be used to set up default pricing information such as discounts and labor rates.

2. Navigate to Others, Profile System Values and set the system profile option Service: Default Coverage for SLA to the name of the template you have created.

Setting Up Task Types and Priorities for Service Request Tasks

This step is required to use service request tasks. The procedure includes only service request related requirements, please see *Oracle Common Application Calendar Implementation Guide* for more detail on the task set up.

To set up task types and priorities:

1. Under the Service responsibility, navigate to the Task Type Setup window (Setup, Task Management, Task Types).

2. All existing task types are displayed. To make task types available for service requests:

    1. Click **Map Types**.

        The Mapping Objects window appears.

    2. For each task type, use the lists of values to enter Service Request in the Source Object field and the task type in the Task type field.

    3. Save your work.

3. Navigate to Setup, then Task Management, then select Task Priority.

    The Task Priority window appears displaying existing task priorities.

4. To make task priorities available for service request tasks:

    1. Click **Map Priority.**

        The Mapping Objects window appears.

    2. For each task type, use the lists of values to enter Service Request in the Source Object field and the task priority in the Task Priority field.

    3. Save your work.

5. For each task priority you want to use with service request tasks:

6. Associate the source Service Request to the task priority.

7. Save your work.

Setting Up New Note Types for Service Requests and Tasks

Use note types to classify the information your organization keeps on service request, tasks, and customers. This procedure is a guideline for setting up new note types. For additional details, see the Setting Up Notes section of the *Oracle Common Application Calendar Implementation Guide*.

The application includes the following seeded note types for use with service requests:

- Action
- Cause
- Changes
- Fact
- Objective
- Problem Description
- Resolution Description
- Symptom

You can create additional note types for use with service requests, with tasks and with customers.

To set up a new note types:

1. Under the Service responsibility, navigate to Setup, then Notes, then select Note Types and create the note type. The codes for predefined service note types start with "CS_", but you can use any unique code you want.

2. Navigate to Setup, then Notes, then Source and Note Type Mapping and use the Mapping Objects window to map the note type to the object where you are going to be using it. The following table lists the objects you can map and where the mapping displays:

Source Object	Where the Note Type appears
Party	Contact Center
Service Request	Service requests in all Oracle TeleService modules
Task Manager	Tasks in all modules. Oracle iSupport does not expose task notes.
Public Service Requests	Service requests in Oracle iSupport

To have notes created with your note type appear in multiple objects, you must map the note type multiple times. For example, for a note to appear in both Oracle TeleService and on the Oracle iSupport Web portal customers user to access service request information, you must map its note type to both Service Request and Public Service Request.

The application does not use entries in the Application field for the mapping.

3. To use the note type for knowledge searches, you must map the note type to a Knowledge Management statement type. For more information see the " Integration" chapter of the *Oracle Knowledge Management Implementation and Administration Guide*.

Indexing Note and Summary Text for Searches

You must run the Service Request: Synchronize Text Index Program concurrent program to make it possible for agents to search for text in the summary and note fields of service requests. By setting this concurrent program to frequently, you can ensure that agents can search recently created service requests.

Some of the options to run the program are as follows:

- **Synchronize**: This must be done at least once a day, preferably, during less traffic times.
- **Optimize/Rebuild**: This must be done based on the size of data, and on a need basis

You must use these options when an index is corrupted or when upgrading the index.

To run the Service Request: Synchronize Text Index Program concurrent program

1. Under the System Administrator Responsibility, navigate to Security, then Responsibility, then select Request.

2. Query for the group "Support Reports".

3. Add the Service Request: Synchronize Text Index Program concurrent program to the list.

4. Save.

Enabling Integration with Oracle Enterprise Asset Management

Agents can create service requests for internal assets maintained in Oracle Enterprise Asset Management using either the Service Request window or the Service Request Update page in Customer Support. The Contact Center does not support the creation of these types of service requests.

Agents can view work orders created in Oracle Enterprise Asset Management related to the service request, but the life cycle of the work order is not in any way tied to the service request life cycle. Closing work orders tied to a service request does not close the service request and vice-versa.

To enable the Oracle Enterprise Asset Maintenance integration:

1. Set up Oracle Enterprise Asset Management according to the procedures described in the *Oracle Enterprise Asset Management User's Guide*.

2. Select the Asset Maintenance check box while setting up service request types. See Setting Up Service Request Types, page 7-14.

3. If you are using the Service Request window (Oracle TeleService), then use the Forms Folder tool to add the following two fields to the Service Request window header:

   - Inventory Org
   - Maintenance Org

   These fields are enabled for entry only for asset maintenance service requests.

4. Set the default maintenance organization in the system profile Service: Default Maintenance Organization.

   If you have set the system profile Service: Validation Inventory Organization to the inventory master organization (the recommended setting), the list of values

includes all of the subordinate maintenance organizations.

If Service: Validation Inventory Organization is set to an inventory organization subordinate to the master inventory organization, then the list of values of the maintenance organizations is restricted to those maintenance organizations for that subordinate organization.

About Oracle Workflow Processes Included with Your Application

Your application includes four Oracle Workflow processes:

- **Call Support Process**

  This process notifies the individual service request owner each and every time a service request of this type is created or updated. The owner can set the status of the service request to Closed by clicking the Resolved button on the notification.

  This process has been superseded by a more flexible notifications process which implementers can use to selectively notify both service request owners and customer contacts of service related events. (See Setting Up Notifications, page 21-1). You may want to associate this workflow to a type only if the resolution functionality is important to you.

  If you associate this workflow with a service request type and also use the new notifications feature, owners may receive two notices for the same event.

- **Customer Support Event Process**

  This process notifies service request owners and contacts of different events related to service requests and is used by the notifications feature of Oracle TeleService. See Setting Up Notifications., page 21-1

- **Duplicate Check and Autotask Create for iSupport and Email Center Created SR**

  This Oracle Workflow process checks for potential duplicate service requests when customers create service requests using Oracle iSupport or agents create service requests from within Oracle Email Center. If the process finds a potential duplicate, it notifies the service request owner.

  When customers create a service request of a type set up with extended attributes, the program instead alerts the individual you specify in the Alert Recipient field of the Service Request Attributes Configuration window. You must be sure to select the Autolaunch check box to enable this process.

- **E-mail Notification Generic Process**

  This sample process initiates when a task of type "Email Follow-up" is created for service requests that have been set up with additional Contact Center attributes. (For information about the workflow process, seeSample Generic E-mail Notification Workflow, page 41-12. For details about capturing the attributes,

seeCapturing Additional Service Request Attributes in the Contact Center, page 40-1.)

The process gets the task attribute details (such as requester, approver, or subject) from the values you enter on the Optional tab of the Task Type: Attribute Configuration window and sets a due date for the approver to acknowledge the e-mail notification.

The due date is set based on the service request creation date and the number of days you enter in the Offset for Due Date attribute. An e-mail is sent to the Approver with the text entered in the Subject, Message Header, Message Body, and Message Footer attribute. If the approver does not acknowledge the message by the end of the due date, the process sends a reminder notification. If the approver acknowledges any of the notifications (the original or a reminder), the workflow terminates. Otherwise, after sending the maximum number of reminders specified in the Email Reminder Counter attribute, the workflow fails and terminates.

When the process completes successfully, the workflow updates the task status to Completed. If the processing fails, the process sets the task status to Cancelled. You can modify these statuses by setting the following system profiles:

- CUG_TASK_FAILED_STATUS
- CUG_TASK_SUCCESS_STATUS

Setting Up the List of Values for the Language Field

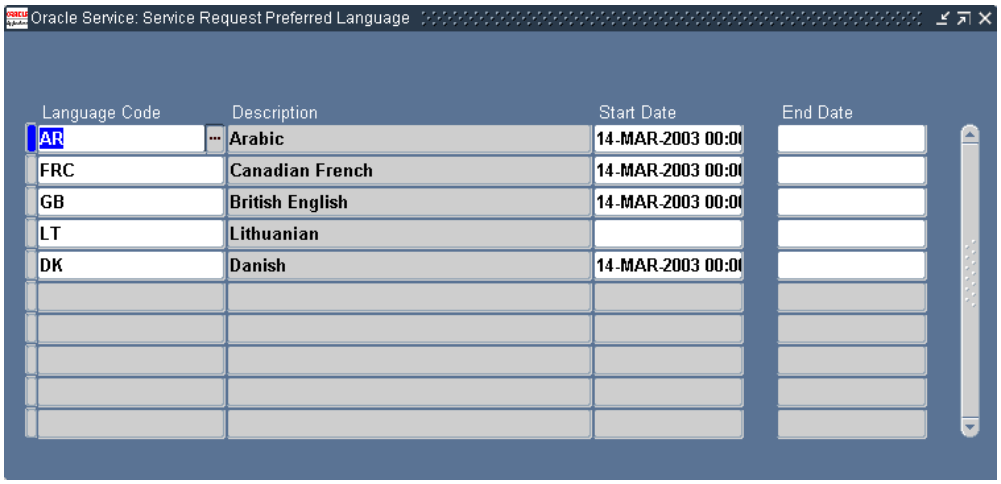
Use this procedure to set up the list of values (LOV) for the Language field in the Service Request. Agents can use this field to indicate a customer's preferred language for a specific service request.

> **Note:** The language preference agents enter using this LOV remain specific only to individual service requests. The preference is not stored in the customer record itself. This means that selecting a language preference in a service request does not modify the customer's overall language preference which is entered in the Preferred Language field in the Party Information tab of the Contact Center.

To set up the list of values for Preferred languages:

1. Under the Service responsibility, navigate to Setup, then Definitions, then select Preferred Languages.

   The Oracle Service: Service Request Preferred Language window appears.



2. Use the Language Code LOV to select the languages you wish to add to the list of values in the Preferred Language field.

   The language name the agent sees in the LOV appears in the Description field.

3. Optionally, enter dates to limit the availability of your entry.

4. Click **Save**.

Obtaining a List of Valid System Profiles and Lookups

You can obtain a list of Oracle TeleService system profiles and lookups by logging in under the Functional Administrator responsibility, selecting the Core Services tab and either the Profile Categories or the Lookups subtab.

> **Note:** List of system profiles and lookups you obtain from the Oracle Forms-based user interface may include legacy data.

Both system profiles and lookups are categorized by application. The two relevant applications for Oracle TeleService are:

- Service

  For all service request related features.

- Customer Care

  For all customer information and Contact Center related system profiles.

The system profiles are also categorized by the function they serve. For example, the Service Work Management category under the Service application includes system profiles you need for work assignment and distribution.

A category may not include all system profiles that you need to set up a feature. This is because the categories apply only to system profiles owned by Oracle TeleService. For example, for Work Management, you must set up system profiles from a number of foundation modules, including the Universal Work Queue. You must check with the appropriate procedures in this guide to find all the relevant system profiles for any feature.

For detailed information on how to use the features of the administrator interface, see the *Oracle E-Business Suite Setup Guide*..

8

Service Request Linking to Specify Duplicates and Other Relationships

This chapter covers the following topics:

- Overview of Service Request Linking
- Permitted Modifications to Service Request Relationships
- Changing the Wording of a Relationship Type or Removing It from Use
- Setting Up Reference Links to Objects Other Than Service Requests
- Turning Off Automatic Service Request Status Updates Rules

Overview of Service Request Linking

By creating a relationship link with another service request or to another object, such as a maintenance plan for a piece of equipment, agents can make information available with a mouse click.

Relationships indicate, for example, that one service request is a duplicate of the other, that one is the cause of another, or that it contains relevant information for the resolution of another. An individual service request can be linked to multiple other objects.

Some types of relationships are merely informational. Others propagate the change of status in one service request to other service requests linked with it. For example, if agents specify that service requests A and B are caused by service request C, then closing C closes A and B as well.

> **Note:** Status propagation is available only for linked service requests, not for other E-Business Suite objects.

The breakdown of a major system can sometimes cause multiple customer contacts to report the same problem. The status propagation permits the service organization to deal with all the duplicate service requests all at the same time.

Users have six available relationship types for linking service requests to other service requests:

- Caused by
- Root cause of
- Duplicate of
- Original for
- Reference for
- Refers to

Only the last two relationship types can be used to link service requests to other objects you set up:

- Reference for
- Refers to

Because relationships between two objects are bidirectional, they come in pairs. If a user specifies a relationship in one direction, the application automatically specifies a relationship in the other direction:

- Caused by / Root cause of
- Duplicate of / Original for
- Reference for / Refers to

The following two relationship pairs also propagate status changes between the linked service requests:

- Caused by/Root cause of
- Duplicate of/Original for

The following table explains the three most frequently used relationship types. The Action column of this table indicates both the status changes and reciprocal links created automatically by the application.

Relationship	Action	Example
Caused by	Linking service request A to service request B using a "Caused by" relationship indicates that A is caused by B. The application: • Sets the status of A to "Waiting". • Creates the reciprocal link "Root Cause of" for B. When B is set to the status of "Closed", then the status of A is automatically set to "Clear ". If multiple service requests are "Caused by" B, then all are set to "Clear".	**Problem**: A customer contact calls to say his e-mail is not working. The support agent discovers that the system administrator has already logged a service request to track this problem. The contact's e-mail is not working because the e-mail server is down. **Resolution**: The agent creates a "Caused by" link between the contact's service request and the service request already logged for the e-mail server problem. The application automatically sets the status of the contact's service request to "Waiting". When the system administrator resolves the e-mail server failure and closes the server problem service request, then the application automatically updates the contact's service request status to "Clear".
Duplicate of	Linking service request A to service request B with the "Duplicate of" relationship indicates that A is a duplicate of B. The application automatically: • Creates an "Original for" link from B to A. • Changes the status of A to "Closed" with the resolution code "Closed as Duplicate".	All call center agents have been notified of the e-mail outage. Subsequently, an employee logs a ticket to report the e-mail outage. The agent who is assigned to work on the service request identifies it as a duplicate and enters the "Duplicate of" link. The application automatically closes the employee's service request with the resolution code of "Closed as Duplicate" and a reference to the service request already logged for the e-mail outage.

Relationship	Action	Example
Refers to	If service request A "Refers to" service request or document B, this means that B has information relevant to A. The application automatically creates the reciprocal "Reference for" relationship from B to A provided both documents are service requests. Agents can use this type of relationship for linking a service request to another object, such as a maintenance plan. See Adding Reference Links to Objects Other Than Service Requests, page 8-6 for more details.	An agent working on a service request remembers that he created a similar service request for another customer. By creating a link to that old service request, he makes it possible for others to refer to it.

Note: Agents are permitted to indicate service request A is a duplicate of service request B only if service request A has no existing relationship links of type Duplicate of, Original for, Root Cause of, and Caused by. The service request may have existing relationship links of type Reference for and Refers to. If A does contain links, and agents wish to indicate A is a duplicate of B, they must first remove the links from A.

Agents are restricted in this way for logical reasons:

- A service request can be a duplicate of only one original.
- Service requests that are originals for others cannot be chained.
- Service requests that are the cause of or caused by others cause logical errors in the status propagation.

Note: If you are using status groups as described in Status Groups and Status Transitions, page 7-4, then you must make sure that the status group mapped to the service request type and responsibility of the person creating the relationship:

- Includes the seeded statuses of "Waiting", "Clear", and "Closed".
- Permits all statuses to transition to "Closed". This is required for the application to automatically close duplicate service requests through status propagation.

Note: The application automatically sends an Oracle Workflow notification to the service request owner if the automatic status update fails. You can modify the text of the Oracle Workflow message "Notify: Service Request Update Failed Message". The item type for this message is Service Request (Internal Name: SERVEREQ).

Note: If you plan to automatically close duplicate service requests that require approvals via electronic signatures (as described in Electronic Approvals and Records, page 19-1) then do not use the predefined Closed status as a triggering status or as an Approval Action status. Create alternate statuses instead.

This makes it possible to distinguish between the two different types of closure and prevents approvers from being forced to approve duplicate requests.

Permitted Modifications to Service Request Relationships

While you are not permitted to add relationship types, you can:

- Change relationship wording or remove a relationship type from use. , page 8-5
- Add reference type links to objects other than service requests., page 8-6
- Turn off automatic service request status update rules., page 8-8

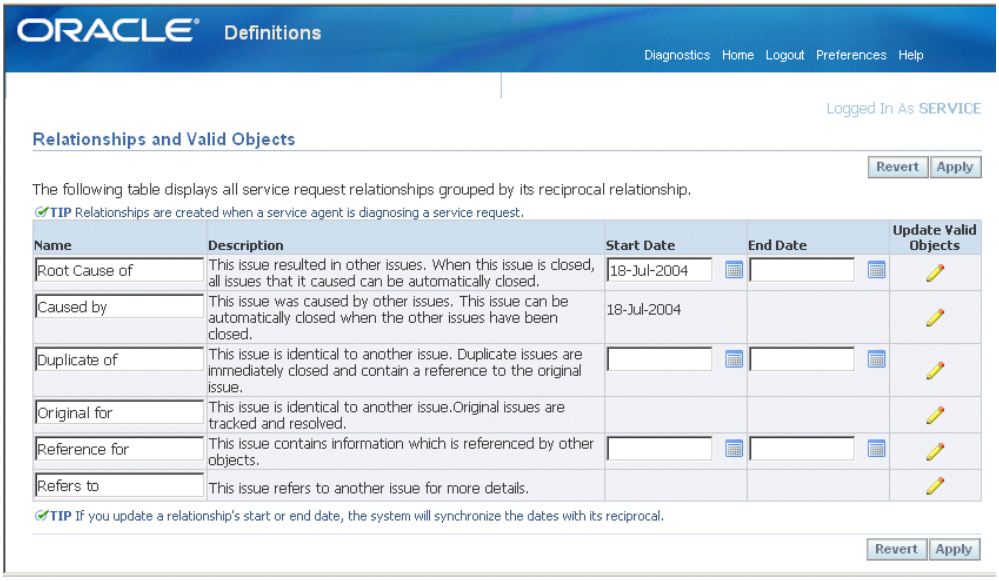
Changing the Wording of a Relationship Type or Removing It from Use

Use this procedure to change the wording users see in the Relationship Type list of values or to remove a link type from use.

To change the wording for a relationship type or remove it from use:

1. From the Navigator, navigate to Setup, then Definitions, Relationships and Valid Objects.

   The Relationships and Valid Objects page appears.



2. To modify the wording of a relationship agents see in the LOV, modify the Name.

3. To restrict the availability of a relationship use the start and end date fields.

   Note: Because the relationships are reciprocal and come in pairs, restricting the availability of one relationship type automatically restricts the availability of its reciprocal.

4. Click **Apply** to save your work.

5. To permit linking of service requests to objects other than service requests using the "Reference for" and "Refers to" link pair, click **Update Valid Objects** (the pencil icon) in the Reference for row and follow the procedure outlined in Adding Reference Links to Objects Other Than Service Requests, page 8-6.

Setting Up Reference Links to Objects Other Than Service Requests

Use this procedure to make it possible for users to link service requests to objects using the "Refers to" relationship link. The system automatically creates the reciprocal " Reference for" relationship. By default, this relationship type is already set up for service requests.

Prerequisites:

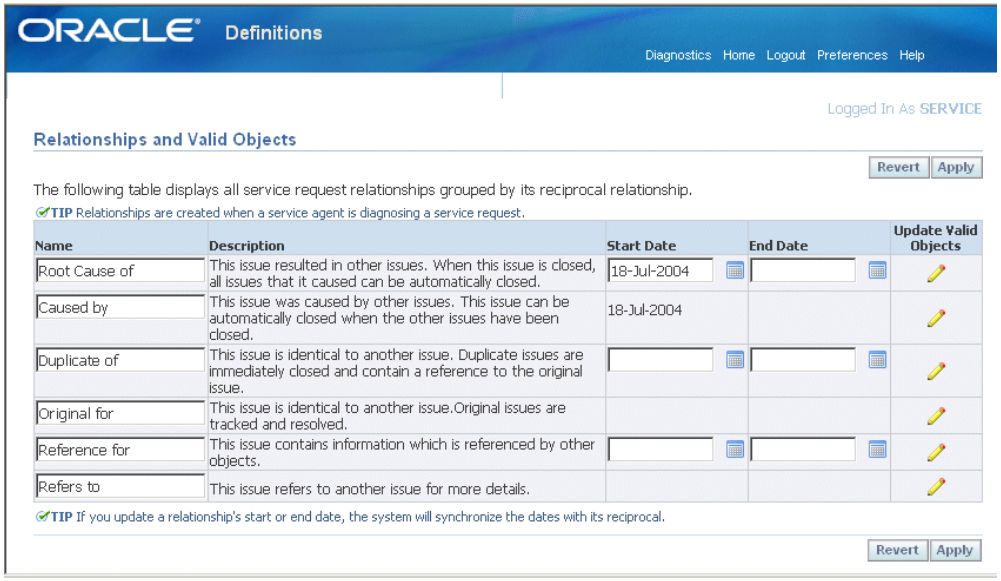
You must set up the objects you want to link to service requests using the Task Setup: Object Types window which is available by navigating to Task and Escalation Manager, Setup, Objects Metadata under the CRM Administrator Responsibility.

See Setting Up Metadata Objects in *Oracle Common Application Calendar Implementation Guide* for details.

To set up reference links to objects other than service requests:

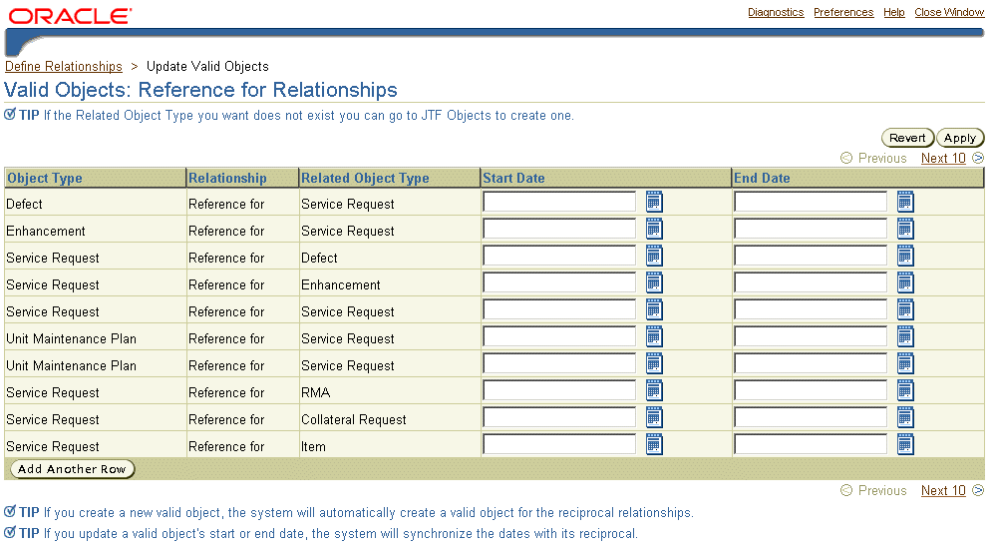
1. From the Navigator, navigate to Setup, then Definitions, and select Relationships and Valid Objects.

   The Relationships and Valid Objects page appears.



2. Click **Update Valid Objects** (the pencil icon) in the "Reference for" row.

   The Valid Objects page appears.



3. Click **Add Another Row**.

4. From Relationship Type list, select **Refers to.**

5. Click **Search for Related Object Type** (the searchlight icon in the Related Object Type column.)

   The Search and Select: Related Object Type page appears.

6. Click **Go** to display all objects you have defined.

7. Select the option next to the name of the object.

8. Click **Select**.

   The object you selected appears in the Valid Objects: Reference for and Refers to Relationships page.

9. Click **Apply** .

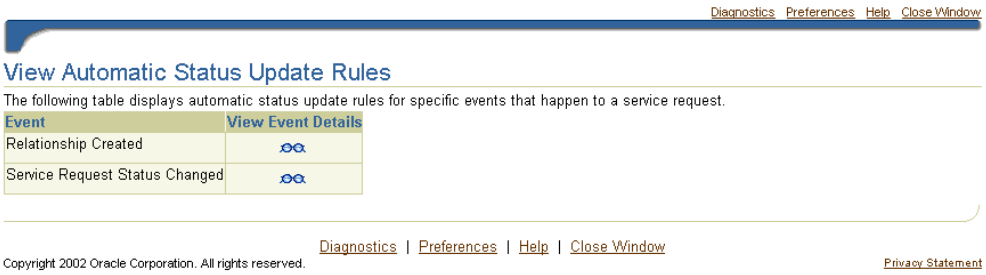
Turning Off Automatic Service Request Status Updates Rules

Use this procedure to turn off any of the predefined automatic service request status update rules. You cannot add rules or modify them.

To turn off automatic service request status update rules:

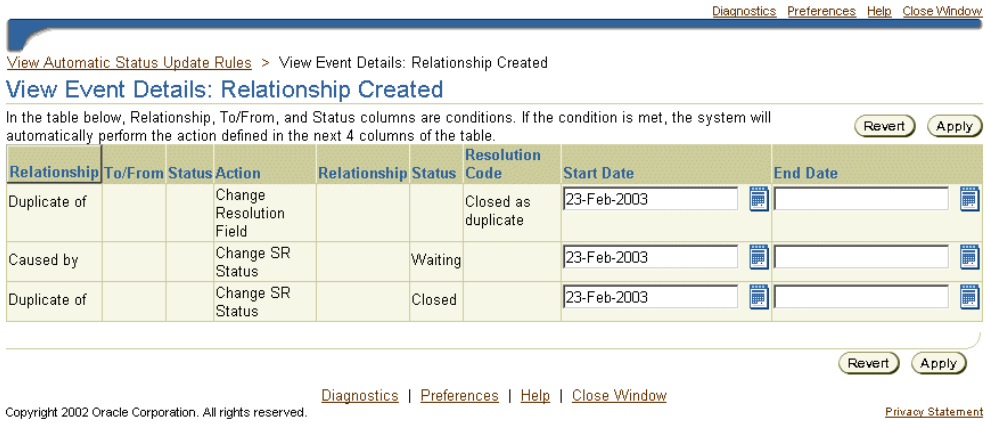
1. To turn off automatic service request status update rules: Under the Service responsibility, navigate to Setup, then Rules, and select Status Update Rules.

   The View Automatic Status Update Rules page appears.



2. Click **View Event Details** (the glasses icon) to the right of the rule type you wish to disable.

   The View Event Details page appears. The page displays different details depending on the rule type you have chosen.



3. Enter an end date for any rule you want to disable.

4. Click **Apply**.

   Note: You can modify the resolution code and the service request status for the Duplicate Of relationship. For the Caused By relationship you can change the service request status. For more information, see Setting Up Service Request Statuses, page 7-8.

9

Setting Up Duplicate Checking

This chapter covers the following topics:

- About the Duplicate Checking Topics
- Duplicate Checking Overview
- Setting Up Duplicate Checking
- Setting Up Duplicate Checking by Customer and Item Details
- Setting Up Duplicate Checking by Service Request Attributes
- Setting Up Duplicate Checking by Item Instance or Serial Number

About the Duplicate Checking Topics

This group of topics explains how you can set up the application to automatically check for potential duplicates of the service request an agent or customer is creating.

For an explanation of the different ways of checking for duplicates, see Duplicate Checking Overview, page 9-1.

For the general setup procedure see Setting Up Duplicate Checking, page 9-3.

The other topics provide details for the setup of each method:

- Setting Up Duplicate Checking by Customer and Item Details, page 9-5
- Setting Up Duplicate Checking by Service Request Attributes, page 9-5

Duplicate Checking Overview

The application determines if new service requests are possible duplicates of existing ones based on the following attributes:

- The customer and item

- Incident address and the information captured through service request attributes

> **Note:** The second method is available only when you implement capturing of additional attributes via the Contact Center.

The two methods of checking for duplicates meet different business needs. If your organization services items owned by your customers, then you are likely to restrict checking to the customer and item combination. If you are a government agency responding to reports of power outages or broken water mains, then you are likely to implement duplicate checking on the extended attributes and the incident address.

You can use the status to identify duplicate service requests. Select the Include in Duplicate Checking check box on the Service Request Status window to enable the status to be considered in the duplicate checking process.

If a service request is identified as a duplicate, then the status of the service request and the resolution code is automatically set to Closed. You can modify the status and the resolution code for an event in the Automatic Status Update Rules window. For more information, see Service Request Linking to Specify Duplicates and Other Relationships, page 8-1.

In the HTML based modules of Oracle TeleService, the agent can search if there are any existing duplicate of and similar service requests to the new service request. Your administrator can set up the application to automatically detect duplicate and similar service requests.

Duplicate Checking Based on Customer and Item

For example, an agent at a printer manufacturer receives a call from a customer contact reporting that a departmental printer is broken. The agent records the details about the problem and asks the caller for the printer's serial number.

If the agent enters the serial number or instance number for the printer, the application checks for duplicates or similar requests and displays a list of any service requests that have been created for that printer within the period you specify.

Because the printer is shared by many people in the department, chances are that others have already called about the same problem. If they have, the agent can abort the service request creation, or, if the problem is new, continue creating the service request.

If the caller does not know the serial or instance number, the application checks for duplicates based on a combination of the customer and item and displays a listing of potential duplicates at the time the agent saves the service request. The agent can either create a service request, or create a duplicate service request that is linked to the original service request.

Creating a duplicate service request, for customers calling about the same problem makes it possible for the organization to track the number of service requests agents handle and to add the customer contact to the list of people who are notified when the issue is resolved.

Online customers who report the same problem on their Oracle iSupport portal, do not receive any warnings. The application permits the customer to create the service request and find duplicates, notify the owner of the service request (an agent that has been assigned to handle the service request) that the customer has created a potential duplicate.

Duplicate Checking Based on Capture of Extended Attributes

A government agency receives a call from a resident of 915 Oxford Street that a truck has been parked in front of the house for the past week.

The agent selects "Abandoned Vehicle" as the service request type and enters the address the caller is reporting as the incident address. The application presents the agent with a list of questions that you have set up for this service request type: What is the make of the vehicle?, the model?, the color?, the license plate number? (See Overview of Topics on Capturing Additional Service Request Attributes in the Contact Center, page 40-1.)

When the agent saves the service request, the application performs the duplicate check based on any of the information you specify using the procedures in this section and displays a list of any potential duplicates.

You must create service request task territories to assign the default task owner (either a group or an individual) else the tasks are not created.

Just as with the previous duplicate checking method, the agent can create a service request, or create a duplicate service request, linked to the original.

Online customers can also report the problem. The application creates the service request and notifies an agent ,you specify in the setup, that a potential duplicate service request is created.

> **Note:** The application notifies different individuals based on the duplicate checking process selected. For customer and item-based checking, the process notifies the service request owner. For attribute-based checking you must specify a single individual to be notified for each service request type.

Setting Up Duplicate Checking

Use this procedure to set up duplicate checking on saving a service request.

To set up duplicate checking:

1. Turn on duplicate checking by setting the system profile option Services: Check for Duplicate Service Requests to Yes.

   By default, this profile option is set to No. This profile option takes precedence over all other duplicate checking setups. If it is set to No, duplicate checking is turned

off.

2. Select the type of duplicate check you wish to use by setting the profile option Services: Service Request Duplicate Criteria as follows:

    1. To enable duplicate checking by customer and item, select one of the following:

        - **Instance or (Customer, Item, and Serial Number)**

          Select this setting if your organization uses serial numbers when logging service requests against items.

          The application checks duplicates on either the instance or the combination of customer, item, and serial number.

        - **Instance or (Customer and Item)**

          Select this option if you do not use serial numbers for logging service requests against items. The application checks for duplicates on either instance or a combination of customer and item.

          > **Note:** This profile takes precedence over setups you make in the Service Request Attribute Configuration window. If you select to check for duplicates using item and customer alone using one of these two settings, the application does not perform a check based on attributes even if you select to do so while setting up attributes in the Service Request Attribute Configuration window.

    2. To enable duplicate checking based on extended attributes and the incident address alone, select **Extended Attributes and Incident Address**.

    3. To enable duplicate checking using both types of check, select one of the two following options:

        - **All with Serial Number**

          Performs both type of duplicate checks with the serial number.

        - **All without Serial Number**

          Performs both type of duplicate checks without the serial number.

3. If you have selected to use duplicate checking by customer and item, then set up the time duration system profile and notifications as outlined in Setting Up Duplicate Checking by Customer and Item Details, page 9-5.

4. If you have selected to use the attribute method of duplicate checking, then select the attributes and time frame for the check in the Service Request Attribute

Configuration window. See Setting Up Duplicate Checking by Service Request Attributes, page 9-5.

Setting Up Duplicate Checking by Customer and Item Details

Use this procedure to enable duplicate checking by customer and item.

Prerequisites:

You must first set up the system profile options to enable duplicate checking by customer and item described in Setting Up Duplicate Checking, page 9-3.

To set up duplicate checking by customer and item:

1. Set up the time frame for the duplicate checking:
    1. Set the system profile option Service: Service Request Duplicate Time Frame UOM to the unit of time you want to use. This profile option is set to Day by default.
    2. Set the system profile option Service: Service Request Duplicate Time Frame to the time duration. By default, this profile option is set to 30.
2. To notify the owner of the service request when the application finds duplicates, set up notifications as described in Setting Up Notifications, page 21-1.

    Notifications provide the only way to alert agents when service requests are created in Oracle iSupport or Oracle Email Center. In the Service Request tab of the Contact Center and in the Service Request window, agents receive automatic alerts.

Setting Up Duplicate Checking by Service Request Attributes

Use this procedure to set up duplicate checking by service request attributes.

Prerequisites:

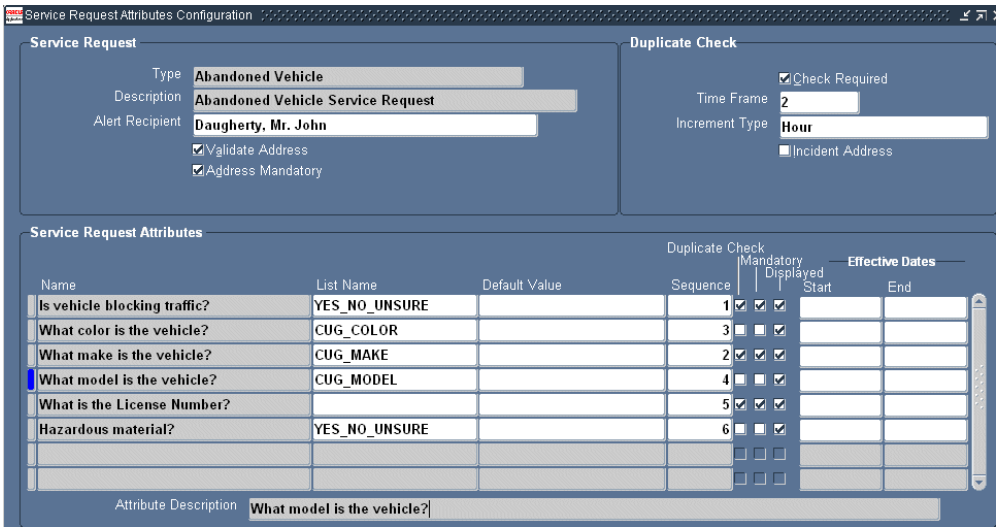
You must first:

- Set up service request attributes according to procedures described in Capturing Additional Service Request Attributes, page 40-1.
- Complete setting the system profile options to enable duplicate checking by attribute described in Setting Up Duplicate Checking, page 9-3.

To set up duplicate checking by service request attributes:

1. Under the Service responsibility, navigate to Setup, then Mapping, and select Extended Attribute Mapping.

The Service Request Attribute Configuration window appears.



2. Select the service request type you wish to set up using the Type list of values.

   The window displays the attributes you have created.

3. In the Duplicate Check region:

   1. Select the Check Required check box.

   2. Enter the time frame as an integer in the Time Frame field.

   3. Select the unit of measure using the Increment Type list of values.

      For example, to check all service requests created in the past two hours for duplicates, enter 2 in the Time Frame field and select Hour as the increment.

4. Select the Incident Address check box to use the incident address in duplicate checking.

5. For each attribute you want to use for the duplicate check, select the Duplicate check box.

Setting Up Duplicate Checking by Item Instance or Serial Number

You can have the application identify potential duplicate service requests whenever agents enter the serial number or the item instance number (the number identifying the customer product in Oracle Install Base).

The application alerts agents about prior service requests for the product.

Note: The application checks for potential duplicates when you select the item instance or serial number and not when you save the service request.

To set up duplicate checking by item instance or serial number:

1. Set up the time frame for the duplicate checking:
    1. Set the system profile option Service: Service Request Duplicate Time Frame UOM to the unit of time you wish to use. By default, this profile option is set to Day.
    2. Set the system profile option Service: Service Request Duplicate Time Frame to the time duration. By default, this profile option is set to 30.
2. Set the system profile Services: Check for Similar Service Requests to Yes. (A setting of No disables this functionality).

10

Setting Up Security

This chapter covers the following topics:

- Overview of Security Topic Organization
- About Service Request and Case Security
- Setting Up Service Request Data Security Process Overview
- About Mapping Responsibilities
- Creating a Responsibility Mapping
- Updating a Responsibility Mapping
- Turning Standard Service Security On or Off
- Creating Your Own Custom Security
- Enabling Responsibility Mappings for Oracle iSupport

Overview of Security Topic Organization

This group of topics explains how you can restrict user access to service request and case data.

- About Service Request and Case Security, page 10-2 provides an overview.
- Setting Up Service Request Data Security, page 10-5 outlines the major steps.
- Creating Your Own Custom Security, page 10-11 provides guidelines for organizations who want to set up their own custom security.

The rest of the topics provide detailed procedures:

- Mapping Responsibilities to Service Request Types and Status Groups, page 10-6
- Turning Security On or Off, page 10-10

About Service Request and Case Security

Oracle TeleService supports both function and data security provided with all applications. See *Oracle E-Business Suite Security Guide* for details.

In addition, your application provides standard service security, data security built on top of the standard application security. This makes it possible for you to restrict by responsibility the ability of users to view and update service requests and related objects by service request (case) type.

> **Note:** The security features for service requests and cases are identical. If you are implementing Case Management, then read case for every mention of service request in this guide and in the user interface used for setup.

To enable standard service security, you must map responsibilities to service request types and turn the standard security on according to the procedures in this chapter.

> **Note:** If you are running multiple service applications in the same database instance, then you must map responsibilities to service request types and turn standard security on to keep users from one application accessing service requests of the other.
>
> For example, an implementation running both Customer Support (to support customers) and Service Desk (to support employees) must create separate service request types and mappings for each application to prevent agents helping employees from viewing service requests logged for customers.

> **Note:** Standard service security relies on the global application context that is set by the application framework on login. If you are using the Service Request public APIs to create and update service requests in an asynchronous manner, then the original application context may be lost. For this reason, you must set the global application context (user_id, resp_id, and resp_appl_id) to the original application context values to ensure that the user had appropriate access to the service request data.

Features of Standard Service Request Security

Standard service request security:

- Prevents users from creating, viewing, and modifying all service request data related to the service request types not mapped to their responsibility. This includes

service request tasks, notes, and interaction history. It even prevents users from viewing relationships of a service request to other service requests of types they cannot access.

- Excludes them from the lists of resources used for service request ownership and tasks assignment.

  Note: For work assignment with the standard service request security enabled, you must make sure every employee has a user account and that the user account is associated with the resource.

  If you are assigning service requests or tasks to nonemployee resources who access the service requests or tasks through a third party software application, then you do not have to set up users for them.

- Prevents them from retrieving service requests via searches
- Prevents them from retrieving service requests via the Oracle Knowledge Management application

Standard security secures service request data not just in Oracle TeleService, but in all applications that use service requests. (See How Turning on Standard Service Security Impacts Other Applications, page 10-3.)

Turning service security on or off does not affect objects such as tasks and notes that are not attached to service requests.

Read-Only and Other Access Types

Standard service security provides either no access or create/update access. It does not distinguish between read-only access and update access.

To provide users with read-only access, you must implement custom data security.

The HTML-based Oracle TeleService modules provide a read-only page for agents with read-only permissions.

The Forms-based Oracle TeleService module and Oracle Depot Repair, however, displays the service request in the edit mode. Users who are restricted to read-only access get no indication that updates are disallowed until they attempt to save their changes and the application displays an error message.

Effect of Turning on Standard Service Security on Other Applications

Turning on standard service security affects all applications and Oracle application foundation modules that use service requests to different degrees:

- Oracle iSupport

  Customers creating service requests on the Web are subject to Oracle iSupport's own security, which is based on the customer: Customer contacts have access only to service requests for their organization.

  You can create responsibility to service request type mappings to prevent customer contacts from creating service requests of types not mapped to their responsibility. However, this restriction is for creation only. Those contacts are not restricted from viewing or updating any service request permitted by Oracle iSupport security.

  When agents work with customer-created service requests in other service applications, however, they are subject to full standard security restrictions (the same as for any other service request.)

- Tasks

  Tasks enforces standard service security only partially. Task standalone forms display all service request tasks regardless of the service request type. However, agents are prevented from making updates in all Task windows.

- Assignment Manager

  The Assignment Manger enforces standard service security fully. This means this module assigns only resources that have access to the service request type.

- Oracle Inbound

  If you have set up an Interactive Voice Recognition (IVR) system to route calls based on customer entering service request numbers, then these calls are routed only to agents who have access to service requests of this type.

  Agents transferring calls regarding service requests to other agents are restricted to transferring the calls only to agents with access to the service request type.

  All telephony implementations must map at least one agent in the call center to each service request type coming through the call center.

- Universal Work Queue

  The UWQ enforces standard security fully. This means:

  - Work queues of each agent display only those service requests of types the agent can access.

  - The number of service requests displayed in each node sums up only information agents can access.

  - The tasks nodes display all tasks, including all service request tasks. However, the agent cannot view the details of service request tasks they cannot access.

  - The Next Work and Request Work buttons assign only work the user can

access.

- Oracle Depot Repair

  Oracle Depot Repair enforces service security fully.

- Oracle Enterprise Asset Management

  Users associating work orders to service requests can only see and select those service requests of types they can access.

- Oracle Install Base

  Oracle Install Base usually permits users to view all the service requests logged for a customer's product. Turning the standard security restricts that view to those service requests of types mapped to the responsibility.

- Oracle Field Service and Oracle Field Service Technician Portal

  Standard security affects the availability of service request details for dispatchers and technicians. For users to be able to drill down to view service request details, you must ensure that their responsibility has the appropriate service request types mapped.

Setting Up Service Request Data Security Process Overview

Use this high-level procedure to guide your implementation of the service request security.

To use the standard security provided with your application:

1. Under the Service responsibility, navigate to Setup, then Mapping, and select Responsibility Mapping and map each responsibility to the service request types you wish users to access. Unmapped responsibilities cannot view or modify any service requests or related objects. For detailed procedures, see Mapping Responsibilities to Service Request Types, page 10-6.

2. Navigate to Setup, then Rules, and select Service System Parameters and turn standard security on. For details, see Turning Security On or Off, page 10-10.

To implement custom data security:

1. Create custom security according to procedures described in *Oracle E-Business Suite Security Guide* - . See Creating Your Own Custom Security, page 10-11 for guidelines.

2. Navigate to Setup, then Rules, and select Service System Parameters and turn the custom security on by selecting **Custom Security** from the Service Request Security

drop-down list. For details, see Turning Security On or Off, page 10-10.

About Mapping Responsibilities

This group of topics explains why and how you map responsibilities to service request types and status groups. It covers:

- The Two Different Uses of Responsibility Mappings, page 10-6
- Where You Create and Update Responsibility Mappings, page 10-7
- Creating a New Responsibility Mapping, page 10-8
- Updating a Responsibility Mapping, page 10-9

Uses of Responsibility Mappings

You create mapping between service request types, responsibilities, and status groups for two reasons:

- As part of standard service security setup to specify which responsibilities get to access which service request types

  If you are using standard service request security, then you must specify which service request types an agent can use by mapping service request types to responsibilities.

- To specify different status groups for different responsibilities using the service request type

  By mapping different status groups to different responsibilities, you can specify different behavior for different users of the same service request type. By making different statuses or transitions available, you can, for example, permit only managers to set a service request to a Closed status. See Status Groups and Status Transitions, page 7-4 and About Mapping Status Groups to Service Request Types and Responsibilities, page 7-7.

  If you do not specify a status group when mapping a service request type to a responsibility, the application uses the default mapping created in the Service Request Types window.

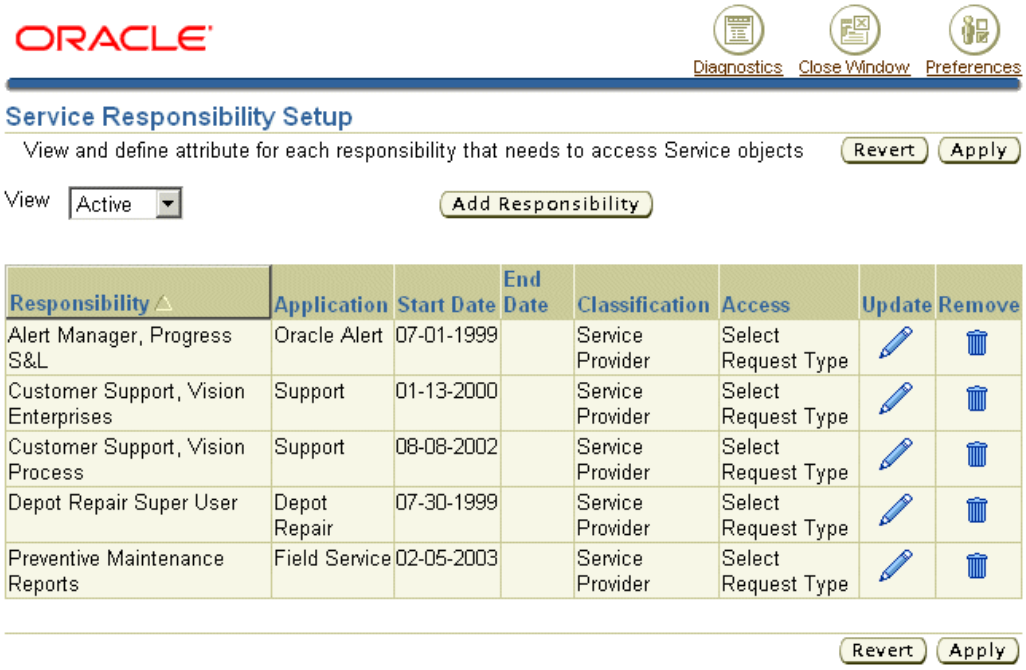
  The mapping of status groups is independent of standard security. This means that the mappings work even if you choose to use custom security.

  > **Note:** If you are automatically closing duplicate service requests using the status update feature offered by service request relationships, then you must include the seeded statuses of "

Waiting", "Clear", and "Closed" and the status group transition rules must permit all statuses to transition to the status of "Closed" for the responsibility creating the relationship. For more information, see Service Request Linking to Specify Duplication and Other Relationships, page 8-1.

Where You Create and Update Responsibility Mappings

You create and update mappings from the Service Responsibility Setup page. (Navigation: Setup, Mapping, Responsibility Mapping).



From this page you can:

- Click **Add Responsibility** to create a mapping . See Creating a New Responsibility Mapping, page 10-8.
- Click**Update** to update an existing mapping. See Updating a Responsibility Mapping, page 10-9.
- Click **Remove** to delete a mapping.

Notes:

By default, the page displays only active mappings. You can change the view by making an alternate selection from the View list:

- **All**: Includes active, inactive, and planned mappings.
- **Planned**: Limits the display to mappings that are not yet in effect.
- **Active**: (the default) Displays only mappings that are currently in effect.

Creating a Responsibility Mapping

Use this procedure to map service request types and status groups to responsibilities.

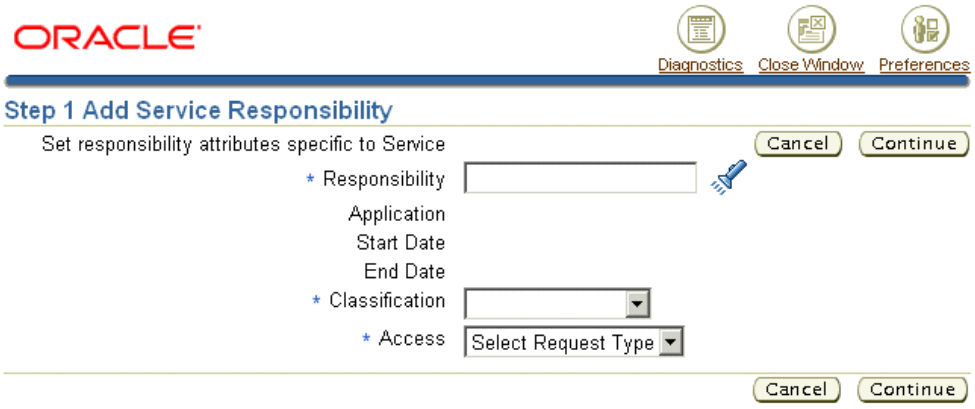
To map a responsibility:

1. Under the Service responsibility, navigate to Setup, then Mapping, then Responsibility Mapping.

   The Service Responsibility Setup page appears.

2. Click **Add Responsibility**.

   The Step 1 Add Service Responsibility page appears.



3. Select the responsibility you want to map.

4. Use the Classification list to specify "Service Provider" if the mapping is intended for Oracle TeleService or other agent-facing service applications. Choose "Self Service User" for Oracle iSupport.

   If you selected "Self Service User", you can only map those service request types that have been set up with the Web Entry check box selected. For details, see Setting Up Service Request Types, page 7-14.

   If you selected "Service Provider", you can specify any service request types, including those specific to Oracle iSupport.

5. Select the type of mapping you wish to create using the Access list:

- To grant this responsibility access to all Service Request Types, select **All Request Types**. If you have selected Self Service User in the last step, then you are mapping the responsibility only to those Service Request Types that are specified for Web entry.

  Note: Granting All Request Types access provides access not only to all existing Service Request Types, but also all of those created in the future.

- To enable access for this responsibility to a subset of service request types, select **Select Service Request Type.**

6. Click **Continue**.

   Step 2 Map Responsibility to Service Request Types page appears.

7. If you selected **Select Service Request Type**, then select one or more types:

   1. Click **Add Another Row**.

   2. Select a Service Request Type.

8. To specify a status group for this service request type and responsibility, select it using the Status Group list. The selection you make here overrides for users of this responsibility the mapping you have made in the Service Request Types window. If you do not make a mapping here, the application automatically uses the mapping you have entered in that window.

9. Optionally, enter dates in the Start Date and End Date fields if you to restrict the availability of this mapping.

10. Click **Finish** to save your entries and return to the Service Responsibility Setup page.

Updating a Responsibility Mapping

Use this procedure to update a responsibility to a service request type and status group mapping.

To update a responsibility mapping:

1. Under the service responsibility, navigate to Setup, then Mapping, and select Responsibility Mapping.

   The Service Responsibility Setup page appears in a browser window.

2. To change the Classification or Access type for this mapping:

    1. Click **Update Responsibility**.

       The Update Responsibility Setup window appears.Here you can select a different access type, and classification.

    2. Click **Apply**.

       You are returned to the Mapping of Responsibility to Service Request Types window.

3. Click **Update** next to the mapping you wish to update.

   The Mapping of Responsibility to Service Request Types page appears.

   On this page you can:

   - Remove a service request type from the mapping, by entering an end date.
   - Specify a service request status group.
   - Map additional types using the **Add Another Row** button.

Turning Standard Service Security On or Off

Use this procedure to turn on or turn off service request security.

> **Note:** If you turn standard service security on or off while users are accessing the application, then you may have to bounce the Apache server after you have changed the setting.

Prerequisites:

You must map service request types to responsibilities or create your own custom security framework before turning security on as a second step. Turning security on as a first step prevents all users from accessing service requests, tasks, and other related business objects.

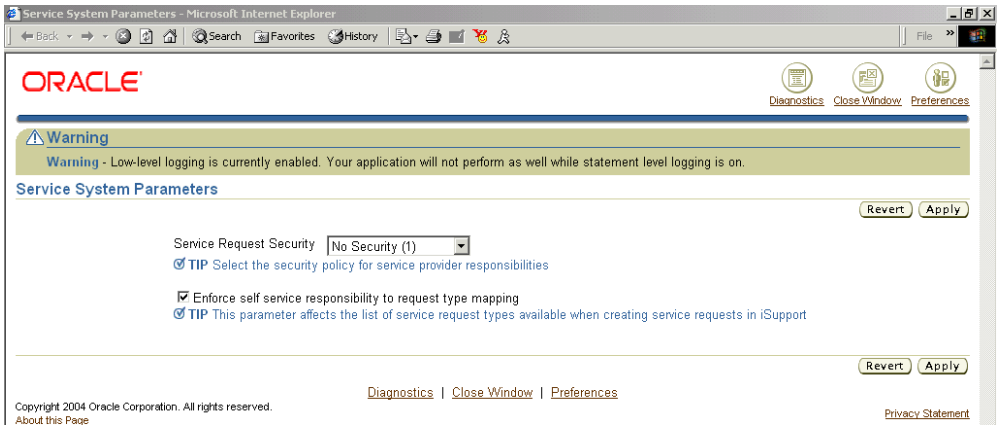
To turn security on or off:

1. Navigate to Setup, then Rules, and select Service System Parameters.

   The Service System Parameters page appears.

   > **Note:** Only the Security region relates to security. The second Self Service region, is for restricting customer access to service request types during service request creation in Oracle iSupport. See

Enabling Responsibility Mappings for Oracle iSupport, page 10-12.



2. Using the Service Request Security list, select one of the following:

   - **No Security**: to turn off security and make all service requests and related tasks available to all users.

   - **Standard Security**: to enable service security supplied with the application.

   - **Custom Security**: to disable the seeded security and turn on your own custom security.

3. Click **Apply**.

Creating Your Own Custom Security

Your organization can create its own custom security framework according to the concepts and procedures described in *Oracle E-Business Suite Security Guide*.

For example, you may want to:

- Restrict users to view only privileges

- Restrict the ability of users to view service requests by status.

  Limiting users to only viewing service requests with the status of Open, for example. You can do so, by inserting a WHERE clause in the SQL statement of the object instance set predicate.

- Restrict access to service requests, tasks, and other business objects to specific responsibilities or individuals

  You can accomplish this by selecting a more restricted grantee such as a

responsibility or a resource. By default, all seeded grantees are global.

The custom security you create replaces the standard security provided with your application.

Note: The application expects all grants to obey the following rules:

- Anyone with create access to a service request must also have read and update access to the service request.
- Anyone with update access to a service request must also have read access to the service request.

When you turn service security off, the predefined grants are disabled.

You can use the predefined data as a guide for creating custom security. See Standard Service Security Predefined Data, page D-13 for a list of predefined data.

Enabling Responsibility Mappings for Oracle iSupport

You can restrict customer contacts from creating service requests by service request type. To do so, you create the same responsibility to service request type mappings used in standard service security and then turn on the mappings using the procedure below.

Prerequisites:

You must map Oracle iSupport responsibilities to service request types that have been specified as Web Enabled. (See Mapping Responsibilities to Service Request Types, page 10-6.)

To use mappings to restrict request creation in Oracle iSupport:

1. Under the Service responsibility, navigate to Setup, then Rules, and select Service System Parameters.

   The Service System Parameters page appears.

2. To restrict Oracle iSupport users from creating service requests of types mapped to their responsibility, select the **Only Service Request Types Mapped to User's Responsibility** option. This restricts only the creation of service requests; not the ability to access existing requests.

   Note: You can use the mappings for this purpose even when standard security is turned off.

3. Selecting **All Web Enabled Service Request Types** permits users to create service

request of any type specified as Web Entry enabled. Any mappings you have created are disabled.

4. Click **Apply**.

11

Setting Up Service Costing

This chapter covers the following topics:

- Setting Up a Costing Method
- Setting Up an Inventory Item
- Setting Up Item Costs
- Setting Up Service Activity Codes
- Installing Oracle XML Publisher
- Setting Up Profile Option

Setting Up a Costing Method

The costing method is defined at the Inventory Organization level. Oracle Cost Management supports four costing methods - Standard Costing, Average Costing, FIFO Costing, and LIFO Costing. Service applications support these methods for material items. For labor and expense items only Standard cost can be applied.

Navigate to Inventory, Setup: Organizations, Organizations, Inventory Organization, Inventory Information, to set up the costing method.

For details on setting up costing methods, refer to Costing Methods in *Oracle Cost Management User's Guide*.

Setting Up an Inventory Item

To set up material items:

1. Navigate to Inventory, Items: Master Items, and then click the Costing tab.
2. Select the Costing Enabled check box.
3. Select the Inventory Asset Value check box.

4. Navigate to Inventory, Items: Master Items, and then click the Service tab.

5. Select the Enable Service Billing check box, and choose Material as the billing type, to enable charges for material items.

To setup labor items:

1. Navigate to Inventory, Items: Master Items, and then click the Costing tab.

2. Select the Costing Enabled and Inventory Asset Value check boxes.

3. Navigate to Inventory, Items: Master Items, and then click the Service tab.

4. Select the Enable Service Billing check box and choose Labor as the billing type, to enable charges for labor items.

To setup expense items:

1. Navigate to Inventory, Items: Master Items, Costing tab.

2. Select the Costing Enabled and Inventory Asset Value check boxes.

3. Navigate to Inventory, Items: Master Items, and then click the Service tab.

4. Select the Enable Service Billing check box and choose Expense as the billing type, to enable charges for expense items.

For more details on inventory item attributes, refer to Item Attributes chapter in the *Oracle Inventory User's Guide.*

Setting Up Item Costs

1. Under the Inventory, Vision Operations responsibility, navigate to Items, then Master Items. From the Tools menu, select Item Costs.

2. In the Cost Element field, enter Material, Resource or Overhead, for material, labor, or expense items, respectively. As these cost elements are predefined in the Costing application, you cannot define additional elements.

For more details on how to define cost items, refer to Item Costing chapter in the *Oracle Cost Management User's Guide.*

Setting Up Service Activity Codes

Service Activity Codes (SACs) determine if cost and charge records are created or not.

1. Using the Service responsibility, navigate to Setup: Charges, and select Service Activities and Billing Types.

2. Select the Create Charge check box to enable creation of charge records.

3. Select the Create Cost check box to generate cost records for the transactions.

Installing Oracle XML Publisher

Install Oracle XML Publisher to implement the XML Publisher report. Associate the XML Publisher Administrator responsibility to the user.

Setting Up Profile Option

The Service: Default Inventory Item for Labor Transactions profile option is used to default the inventory item and create cost records for labor transactions that are created with no inventory item on the Debrief UI. This value is used when Create Cost in the SAC is set to Yes and Create Charge is set to No.

To set up the profile option, you need to select a value from the LOV. It displays all the Inventory Items that have the billing type as labor, and that are assigned to the Inventory Organization defined in the Service: Inventory Validation Organization profile option.

12

Implementing Charges

This chapter covers the following topics:

- Overview of Charges
- Setting Up Charges Process Overview
- About Setting Up Business Process, Service Activity, and Billing Type
- Key Charges Concepts
- Process Overview for Business Process, Service Activity and Billing Types Setup
- Setting Up Additional Service Billing Types
- Associating Billing Types with Billing Categories
- Setting Up Service Activities
- Associating Service Activities to Business Processes
- Setting Up Items in Oracle Inventory
- Guidelines for Setting Up Items in Inventory
- About Setting Up Labor Schedules for Pricing Labor
- Setting Up the Contract Labor Schedule
- Setting Up the Default Labor Schedule
- Restricting Agent Use of Operating Units for Charge Lines
- Setting Up Rules for Specifying the Default Operating Unit
- Modifying the Display of Charges on Customer Invoices
- Setting Up Charges System Profiles
- About Setting Up Remaining Charges System Profiles
- Setting Up the Default Sort Order on the Charges Tab
- Setting Up the Default Service Request Business Process
- Specifying the LOV Type for Price List

- Preventing Errors from Recalculating Prices in Oracle Order Management
- Setting Up Charges User Hooks
- Setting Up Charges Submission

Overview of Charges

Charges is a component of the Oracle TeleService application that is used by many Oracle applications including Oracle Field Service and Oracle Depot Repair.

Using Charges you can:

- Create orders for shipments
- Create return orders (RMA)
- Bill customers for any services provided to them

Charges features make it possible to:

- Create and view charge lines (shipments, returns, and billing)
- Create and view estimated charge lines and convert them to actual charges
- Roll up charge lines (labor, material, expenses) into a defined item (labor, material, and expenses)
- Associate charge lines with an existing order
- Apply contract terms and conditions to charge lines. For example, discounts and labor pricing.
- View coverage information for a contract
- Submit charge lines to Oracle Order Management through Oracle Quoting
- Achieve multi-currency compliance

Key user procedures for Charges are outlined in Charges User Procedures, page 54-1.

Architecture of Charges

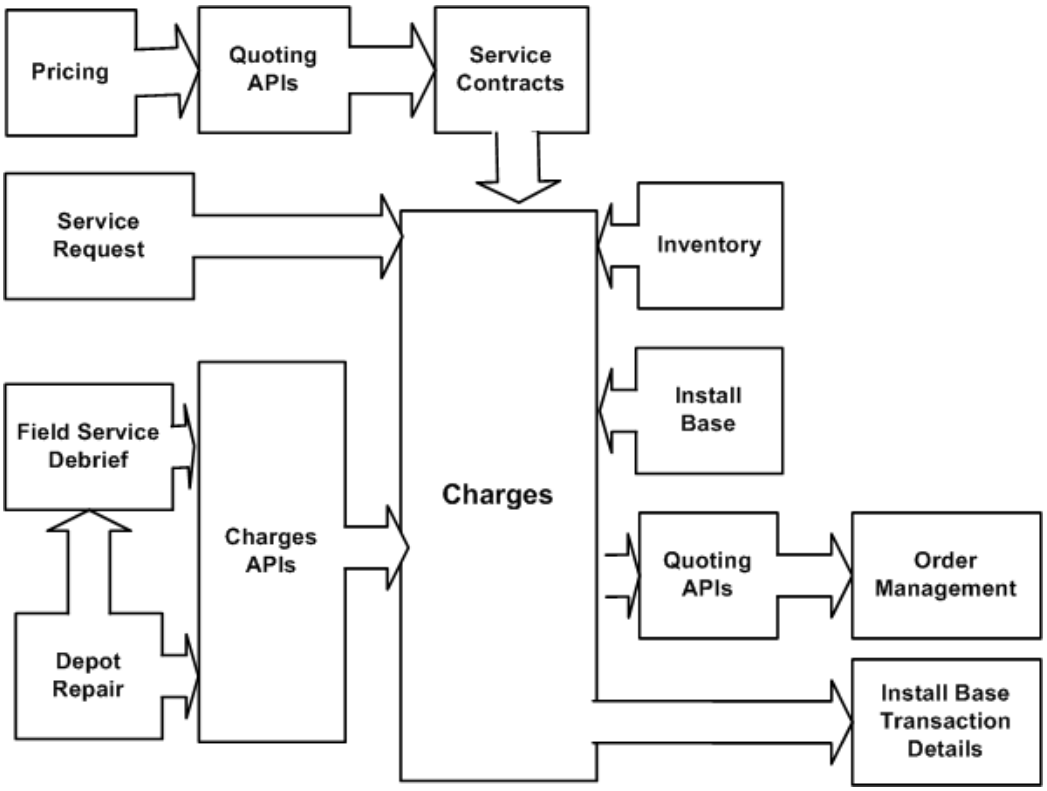
Charges is available in both, Forms based Service and Contact Center modules and the HTML based modules of TeleService.

It integrates with the following Oracle applications:

- Oracle Field Service

- Oracle Depot Repair
- Oracle Contracts
- Oracle Quoting
- Oracle Inventory
- Oracle Install Base
- Oracle Order Management

The following diagram illustrates the architecture and data flow for Charges:



Charges integrates with Oracle Order Management for returns, shipments, and billing through APIs provided by Oracle Quoting. When you book an order (shipment or return), Oracle Quoting APIs pass the order to Oracle Order Management, an application that determines how the order is filled and shipped. Oracle Quoting APIs then give you a confirmation number that is displayed in Charges in the Line Number field. After the invoice cycle is complete, the invoice number and the invoice date are also displayed on the Order Status tabbed page of the Charges window in the Invoice Number and Invoice Date fields respectively. If an order line is split in Oracle Order Management, then Charges displays the status of the first line.

Oracle Service Contracts, Oracle Inventory, and Oracle Install Base integrate directly

with Charges, whereas Oracle Field Service Debrief, Oracle Advanced Pricing, and Oracle Depot Repair communicate with Charges through Charges APIs. Oracle Advanced Pricing communicates with Charges through Oracle Quoting APIs.

Setting Up Charges Process Overview

This procedure provides an overview of the major steps required to set up the Charges module of Oracle TeleService. Follow the references in each step for details.

Prerequisites:

You must complete implementation of the following applications:

- Oracle Order Management
- Oracle Inventory
- Oracle Advanced Pricing price lists

The following are optional:

- Oracle Install Base
- Oracle Service Contracts
- Oracle Field Service

To set up Charges:

1. Set up or verify the setups of your inventory items. The application uses inventory items not only for tracking physical items but also for pricing labor and expenses. You set up labor items in Oracle Inventory and price them using price lists in Oracle Advanced Pricing. See Setting Up Items in Oracle Inventory, page 12-20.

2. Implement Oracle Order Management. For example, you must set up Line Types, Defaulting Rules, and Oracle Workflow processes assigned to the different line types and headers.

3. Set up labor schedules for pricing labor in Oracle Service Contracts and a default schedule for labor not covered by contract. See About Setting Up Labor Schedules for Pricing Labor, page 12-25.

4. Set up any discounts for the labor items within Oracle Service Contracts. See the *Oracle Service Contracts Implementation Guide* for details.

5. Set up the rules for defaulting the operating unit, the financial entity that is used for billing and receiving payments from the customer. See Setting Up Rules for Defaulting the Operating Unit, page 12-30.

6. Set up business processes, service activities, and billing types as described in Setting Up Business Processes, Service Activities, and Billing Types, page 12-12.

7. To have agents ship or receive items tracked by Oracle Install Base, you must set up the Install Base Transaction Subtypes. See About Topics Relating to Charges and Oracle Install Base, page 32-1.

8. Optionally, you can modify the way charges are displayed on customer invoices. See Modifying the Display of Charges on Customer Invoices, page 12-32.

9. Specify the following profile options that define the behavior of Charges.

Profile Option	Description
Charge: Default Price List	This profile option is used to obtain the default price list. The price list set up in this profile determines the price of the items in the charge lines when there is no contract attached The valid values for this profile are all active price lists defined in the system.
Service: Action For Missing Account/Account Site in Charges	This profile is used to determine whether an account has a site or site usage when a charge line is submitted If the profile is set to Abort Submission of Charges, then an error is displayed and the process is aborted.If the profile is set to Allow Automatic Creation of Account/Account Site, then an account or account site usage is automatically created.
Service: Allow Charge Operating Unit Update	This profile determines whether the default operating unit can be modified. If the profile is set to Yes, the default operating unit can be updated. If set to No (default value), you cannot update the operating unit. If the profile Charges: Enable Ship Sourcing Rule is set to Yes, and the agent selects the inventory organization from another operating unit, the operating unit is displayed by default in the operating unit. Even if the profile Service: Allow Charge Operating Unit Update is set to No, and then too the operating unit is displayed by default.

Profile Option	Description
Service: Auto Launch Workflows on the Service Request Transitions	This profile determines if workflows must be launched during service request status transitions. If the profile is set to Yes, the workflow that is mapped to a status transition is launched.
Service: Charges Autosubmit Mode	This system profile is used to specify when charges should be submitted to Oracle Order Management. The available values for this profile are all Service lookups with lookup type CS_CHG_AUTO_SUBMIT_MODE.
Service: Charges Book Order Automatically	This site level profile option is used to set up how you want Oracle Order Management to handle Charges orders: • Set to Yes to add charges to booked orders or automatically create orders in Oracle Order Management with a status of Booked. If there is an existing booked order for the bill to party, then the application adds charges to it. If there are no booked orders, Charges creates a new order and books it automatically. This is true even if there are open Entered orders. • If you select the default setting of No, the orders are in the Entered status. The order must be booked before the customer is billed. If there is an open Entered order for the bill to party, then the application adds charges to it.If there are only Booked orders or if there are no open orders at all, then Charges creates a new order.

Profile Option	Description
Service: Charges – Default Business Process from SR	This profile is used in Charges to obtain the default business process from the service request type on new charge lines. If the profile is set to Yes (default value), then the default business process on the charge line is set based on the value specified in the service request type.
Service: Charges Default Conversion Type	This profile is used to specify the default conversion type for converting the transactional currency from Service debrief to the billing currency that is used in Charges. This used only for expense lines. Available values are Corporate, EMU Fixed, Spot or Use.
Service: Charges Default Max Roll Days	This profile is used to specify the maximum rollup days in the past that can be used while checking a rate for conversion. This is used for converting the transaction currency from Service debrief to the billing currency used in Charges and is used only for expense lines.
Service: Charges Default Sort Order	This profile is used to sort the charge lines by default in the order specified by this profile. Available values are all Service lookups where lookup_type = CS_CHG_SORT_ORDER.
Service: Charges Pricing Date	This profile is used to set the item price date on the charge line based on the incident date or the system date. If the profile is set to "Use Charges Creation/Update Date", then the system date is used as the date on the charge line. If the profile is set to "Use Service Request Incident Date", then the incident date is used as the date on the charge line.

Profile Option	Description
Service: Charges – Use Long List LOV for Price List	This profile is used to determine the display of the price lists in the Charges tab. If this profile is set to Yes, then agents must enter the search criteria before displaying the list of values for price lists. If set to No, it displays the short list of values format.
Service: Check debrief status when submitting charges	This profile is used to specify whether to check if any unprocessed debrief lines exist before submitting charge lines to Oracle Order Management. The value set in this profile is also used in the Auto Submit Program when submitting charge lines. If the profile is set to Yes, then program checks for the status of the debrief lines before submitting charges.
Service: Default Manual Modifier	This profile is used to determine if an adjustment line must be created in Oracle Order Management to account for the contractual discounts. If this profile contains a value, an adjustment line is created for the contractual discount.
Service: Default Return Type	This profile is used to default the return type for Charges return lines. You can select one of the following values: • Normal Defective – Select this if the part or item is fine at first, but then stopped working after the warranty period • DOA – Select this if the part or item is defective on arrival • Excess – Select this if the part or item is an extra part • Warranty – Select this if the part or item is broken and is still under warranty

Profile Option	Description
Service: Default Task Template Groups LOV Behavior	This profile determines the default behavior of the Task Template LOV on the Service Request task details section. Available values are Show All Task Template Groups for Service Request and Filter Task Template Groups by Service Request Attributes. If this profile is set to "Show All Task Template Groups for Service Request", the "Show All Task Templates" check box above the task template group LOV is selected by default and the LOV will display all effective task template groups defined for application of Service and document type of Service Request. If this profile is set to " Filter Task Template Groups by Service Request Attributes", then the check box is not selected and the LOV displays the effective and matching task template groups based on the values of the four service request attributes of service request type, item, item category, and problem code.

Profile Option	Description
Service: Enable Ship Sourcing Rules	This profile is used to determine if the Inventory Org and Sub Inventory LOVs in Charges must consider ship-sourcing rules when displaying the list of inventory organizations and sub inventories. This profile is used in conjunction with the profile Service: Restrict Operating Unit by MOAC.If the profile Service: Enable Ship Sourcing Rules is set to Yes and the profile Service: Restrict Operating Unit by MOAC is set to No, the Inventory Organization and Sub Inventory LOV displays a de-normalized list of list of inventories as given by the Spares API. If both profiles are set to Yes, the LOV displays inventories and sub inventories as given by the Spares API but filters out the ones that the user does not have access to as determined by the security profile assigned to the user. If both profiles are set to No, the inventories and sub inventories are displayed, filtered by the operating unit on the charge line.
Service: Enable Currency Conversion in Charges UI	Charges. If this value is set to No, the base currency of the selected pricelist is set as default and cannot be modified. If the profile is set to Yes, the base currency of the selected pricelist is set as default. The currency field is an LOV that displays all currencies defined in the multi-currency conversion list tied to the selected price list. Users can choose a currency from this LOV and the price fields are automatically converted to display prices in the selected currency.

Profile Option	Description
Service: Enable Return Routing Rules	This profile is used to determine if the Inventory Org and Sub Inventory LOVs in return Charges must consider return routing rules when displaying the list of inventory organizations and sub inventories. This profile is used in conjunction with the profile Service: Restrict Operating Unit by MOAC. If the profile Service: Enable Return Routing Rules is set to Yes and the profile Service: Restrict Operating Unit by MOAC is set to No, the Inventory Organization and Sub Inventory LOV displays a de-normalized list of list inventories as given by the Spares API. If both profiles are set to Yes, the LOV displays inventories and sub inventories as given by the Spares API but filters out the ones that the user does not have access to as determined by the security profile assigned to the user. If both profiles are set to No, the inventories and sub inventories are displayed, filtered by the operating unit on the return charge line.
Service: Restrict Operating Unit by MOAC	This profile determines if the Operating Unit LOVs in Service Request and Charges must only display operating units accessible by the user as dictated by the user's security profile. If the profile is set to No (default value), then the LOV shows all active operating units. If the profile is set to Yes, then the LOVs display operating units accessible to the user as dictated by his security profile.

10. If you are using Oracle Field Service, you can automate the submission of charges to Oracle Order Management.

About Setting Up Business Process, Service Activity, and Billing Type

This section explains how to set up the classification system your agents use to enter the labor, parts, and expenses that are processed, shipped, and billed through Oracle Order Management.

This section covers:

- Key Charges Concepts, page 12-12
- Process Overview for Business Process, Service Activity and Billing Types Setup, page 12-14
- Setting Up Additional Service Billing Types, page 12-15
- Associating Billing Types with Billing Categories, page 12-15
- Setting Up Service Activities, page 12-16

Key Charges Concepts

To enter a charge line, an agent must select:

1. A business process
2. A service activity
3. An inventory item
4. If the item is a physical item which is tracked by Oracle Install Base, such as a product being returned for repair, then the agent must also enter an instance number.

Business Process

A business process provides a general classification of the work performed. Examples include depot repair, field service, and customer support. The business process is the first entry agents make on a charge line.

Service Activity

Each business process is associated with a list of activities that can be performed as part of that process.

For example, if the business process involves shipment of a replacement piece of equipment to the customer, the return of the defective equipment, and the installation of the new piece of equipment at the customer site by a field service technician, then

you may want to set up three activities "Ship Replacement", "Return Defective Equipment", "Install Replacement Equipment".

You must classify each activity as either of type "order" or of type "return." Order activities can be related to bill only lines, or the shipment of items to customers. Return activities are used for recording customer returns of items they own.

In the above case the Ship Replacement and Install Replacement Equipment are activities of type order. The Return Defective Equipment is of type return.

Service activities are reusable: you can associate one activity to multiple business processes.

The activity the agent selects determines which inventory items they can enter in the charge line. However, activities restrict the list of inventory items only indirectly through an inventory classification called a billing type.

Billing Types

Billing types are used to categorize items in inventory for use in service applications. For example, you associate the labor billing type with all of the different labor rates in inventory, and the material billing type with all of the parts and equipment in inventory that can be sold to customers.

By associating billing types with service activities you determine what items an agent can enter in a charge line for a given activity.

You can associate multiple billing types to a single service activity. For example, a repair activity may have billing types of material (the parts used in the repair), labor, and expenses (travel).

> **Note:** You can create your own billing types for material and expenses, but you must use the predefined Labor billing type for all labor.

You may choose to associate the Ship Replacement activity from the above example, with two billing types: material (the new piece of equipment) and expense (shipping charges).

The Return Defective Equipment activity may just have one billing type: material (the equipment being returned).

The Install Replacement Equipment activity may be associated with three billing types: Material (for any additional parts needed by the field technician), labor (the labor involved in installing the new equipment), and expenses (any non-itemized costs).

The application comes with several billing types defined for you, but you can add as many additional billing types as you like by modifying the lookup code MTL_SERVICE_BILLABLE_FLAG.

For an item to appear in the list of items in Charges, you must associate it with a billing type.

Billing Categories

If you have created any additional billing types, you must classify them as either material or expense. (Charges does not support any additional labor billing types, only the predefined Labor billing type.) The categorization, using Billing Categories, ensures it is processed correctly by Charges and other applications that use Charges, including Oracle Field Service.

Business Processes, Service Activities, and Billing Types in Contracts

Oracle Contracts uses business processes, service activities, and billing types to specify the level of coverage and discounts for a customer. A contract may cover different business processes differently. For example, a customer's service level agreement may provide free customer support over the phone, offer a 10 percent discount for inhouse depot repairs, but charge the customer fully for field service visits.

Process Overview for Business Process, Service Activity and Billing Types Setup

This topic outlines the major steps you need to perform to set up the business processes, service activities, and billing types classification system.

To set up business processes, service activities, and billing types:

1. The application includes predefined material, labor, and expense billing types, but you can set up additional expense and material billing types following the procedure described in Setting Up Additional Service Billing Types, page 12-15. You must use the predefined Labor billing type for all labor.

2. You must classify any additional billing types you have created as material, or expense by associating them with Billing Categories. Charges does not support any additional labor billing categories. See Associating Billing Types with Billing Categories, page 12-15.

3. Set up the service activities as described in Setting Up Service Activities, page 12-16 . You must:

    1. Define the service activities and associate each service activity with all billing types used for that activity. This restricts agent choices of inventory items to those associated with the billing types you associate here.

    2. Associate each service activity and billing type pair with at least one operating unit and specify the header and line type for the order. This ensures that the items entered are processed through Oracle Order Management.

3. For any activity that involves the shipment or receipt of items tracked by Oracle Install Base, you must set up a corresponding Oracle Install Base transaction subtype according to the procedure described in Setting Up Install Base Transaction Subtypes, page 32-13.

4. Set up the business processes that the agents use to classify work for the customer and associate them with appropriate activities. For more information, see:

   - Setting Up Business Processes, page 7-1
   - Associating Activities To Business Processes, page 12-20

Setting Up Additional Service Billing Types

Use this procedure to set up additional service billing types. You can create as many material or expense billing types as you need. Charges does not support additional labor billing types.

To set up additional service billing types:

1. Under the Service responsibility, navigate to Others, and select Customer Support Lookups.
2. Using the Query By Example method, display the lookup type MTL_SERVICE_BILLABLE_FLAG.
3. Enter the additional billing types. The Meaning field is what appears in the lists of values.
4. Save your work.
5. You must now classify the billing types you have created as Material or Expense. See Associating Billing Types with Billing Categories, page 12-15.

Associating Billing Types with Billing Categories

Use this procedure to classify any billing types you have created as material or expense. Only billing types associated with these billing categories are available for use in service applications.

To associate billing types with billing categories:

1. Under the Service responsibility, navigate to Setup, then Charges, and select Billing Type Attributes.

   The Billing Type Attributes page appears.

2. Enter the billing type using the Billing Type list of values (LOV).

3. Classify the billing type as either a material or expense using the Billing Category LOV.

4. It is not necessary for you to enter dates in the Start Date and End Date fields as this controls the availability of the billing type to category mapping and not the billing type itself. The start date is populated for you automatically.

5. Using the Rollup Item LOV you can specify a single item to appear on customer invoices as a substitute for all items classified by the billing type. For example, substituting the general term "Overtime" for multiple overtime labor rates. For an explanation of roll-up items, see Modifying the Display of Charges on Customer Invoices, page 12-32.

Setting Up Service Activities

Use this procedure to set up service activities that field service, depot, and call center agents use to classify work performed on behalf of a customer.

> **Note:** You must create separate activities of type order for Oracle Field Service (Debrief) and Oracle TeleService Charges module if a customer's install base is being updated. This is because Oracle Field Service and Oracle TeleService update the customer's install base separately.

To set up a service activity:

1. Under the Service responsibility, navigate to Setup, then Charges, and select Service Activities and Billing Types.

   The Service Activities and Billing Types page appears.

2. Click **Add Another Row** .

3. Enter a name and an optional description in the Service Activity and Description fields.

4. Specify if this activity is related to an order or a return by making a selection with the Line Category LOV. This setting prevents a single service activity from being used for an order in one operating unit and a return in another.

5. Use the Calculate Price list to recalculate the price for the associated service activity. You can select any of the following options:

   - Freeze - Select this option to freeze the price.

- Calculate - Select this option to recalculate the price of the inventory item associated with the service activity. There is a risk of losing all contractual discounts if you select this option.

- Partial - Select this option to add shipping and freight charges to the original price of the item.

6. If you plan to use this activity in Oracle Depot Repair, then select the Oracle Depot Repair Quantity Update check box.

7. If this activity does not incur any charges to the customer, then select the Zero Charge check box. The item still appears on the customer invoice but with no charge. You are setting up the default value only. The agent can change it when they enter a charge.

8. If this activity is not billed to customers but has to be entered as a charge line by agents for costing purposes (for example, for tracking travel expenditures), then deselect the OM Interface check box. If this check box is not selected, then charges for it do not appear on the customer invoice.

   If the check box is selected (the default value), then the customer is billed for any charges for this activity.

   The agent can change the status of this check box when they enter a charge.

9. Select the Travel Flag check box to create travel debrief lines for the service activity in the Field Service Technician portal.

10. Select the Create Cost check box to create a service cost for the cost line. You must select this check box if you want to post the service costs in Oracle Projects.

11. Specify the billing types that can be used with the service activity. You can have multiple billing types for a single service activity. For example, the replacement of a defective part may include material (the part itself), the labor required to install it, and expenses for shipping or travel. For each Billing type:

    1. With the activity selected, place your cursor in the Billing Types region and click **Add Another Row** .

    2. Select the billing type using the Name LOV.

    3. Optionally, you can control the availability of the billing type by entering dates in the Start Date and End Date fields.

    4. Select the expenditure type class. The Expenditure Type Class LOV lists all active expenditure classes defined in Oracle Projects.

       It is recommended that the following expenditure type classes be used for the

different service costs in Oracle TeleService. However, if you choose to use a different billing type-expenditure type class combination from the below table, you must post the Oracle Projects' interface table with the relevant data through the appropriate user hooks in the Interface Service Costs to Projects concurrent program.

Billing Type	Expenditure Type Class
Labor (internal employee)	Straight Time
Labor (3rd party)	Miscellaneous Transaction or Supplier Invoices (if vendor id is known)
Expense (internal employee)	Miscellaneous Transaction
Expense (3rd party)	Miscellaneous Transaction or Supplier Invoices (if vendor id is known)
Material	Inventory

5. Select the expenditure type. The expenditure type identifies the type of costs the interface line falls under. Each expenditure type is mapped to one or more expenditure type class.

   The Expenditure Class is enabled only when you select the expenditure type class and displays all types belonging to the expenditure group. The expenditure category and UOM details are automatically displayed when the expenditure type is selected.

6. Select the transaction source for the billing type. Selecting a transaction source enables you to interface the relevant cost records and data into the Projects interface table. Since the interface table may contain transaction data from many different sources, for example, Oracle Payables or Oracle iExpense, each row in the interface table must be mapped to a transaction source so that the Transaction Import process can import only data from a particular transaction source at a time.

   The transaction sources are defined in Oracle Projects. Each definition identifies whether the costs associated with the transaction source must be treated as accounted in GL. It also defines whether reversals or adjustments are allowed in Oracle Projects and whether the costs are posted in the PA transaction import interface table. All costs in Oracle Service are defined to be unaccounted in GL.

   The following three transaction sources are predefined for Oracle TeleService – Service Labor, Service Material, and Service Expense. But, you can select any

transaction source apart from the above sources.

7. Select the Interface to Projects check box to enable the transaction source and expenditure related fields. If the check box is selected, then the corresponding cost records can be posted to Oracle Projects interface table when the concurrent program runs with the appropriate criteria. If the check box is not selected, then the corresponding cost records cannot be posted to the interface table.

8. Select the Save Project Information on Sales Order check box to save the project number and project task number on the charge line on the sales order.

9. Select the Use Projects Cost Rates check box to calculate costs after the import using the cost rate set up in Oracle Projects, multiplied by the quantity of the item. This check box is not selected if any of the predefined transaction sources – Service Labor, Service Material, or Service Expense is selected.

12. For each activity and billing type pair, enter all operating units together with the Oracle Order Management order and line types. You may have multiple operating units if, for example, you have a central support center that is dispatching repair crews or parts from different locations (operating units):

    Note: The operating unit is an entity used by financial applications to create, process, and report on financial data. It is not the same as an inventory organization, an organization for which you track inventory transactions and balances, and/or an organization that manufactures or distributes products.

    1. Select the activity and one of the billing types you have associated to the activity in the previous step.

    2. In the Order Management Header and Line types region, enter the operating unit, order type, and line type that is used by Oracle Order Management to process the order. Repeat this step for each possible operating unit.

    3. Repeat this procedure for each of the billing types associated with the activity.

13. If agents are going to be using the activity you have set up to enter items tracked by the Oracle Install Base, then you must set up the activity as an Oracle Install Base transaction type. See Setting Up Install Base Transaction Subtypes, page 32-13.

14. Associate the activities to business processes. See Associating Service Activities to Business Processes, page 12-20.

    Business processes are required both for Charges and for defining Oracle Service Contracts' coverage templates and the default service level agreement. Coverage

templates specify your organization's contractual obligations to customers including response times, resolution times, and discounts.

Associating Service Activities to Business Processes

Use this procedure to associate service activities to business processes.

Prerequisites:

You must first set up:

- Business processes (See Setting Up Business Processes, page 7-1.)
- Service activities. (See Setting Up Service Activities, page 12-16.)

To associate service activities to business processes:

1. Under the Service responsibility, navigate to Setup, then Charges, and select Service Business Process.

   The Service Business Process page appears.

2. Use the query by example method (View, Query by Example) to display the business process you want to set up.

3. Associate the service activities to the business process in the Service Activities region.

Setting Up Items in Oracle Inventory

Use this procedure as a guideline for:

- Verifying that existing items are set up correctly for Service applications. For example, you must classify items by billing type on the Service tab of the Item Master window.
- Setting up new inventory items used for billing customers for services, for example, different labor overtime rates.

Prerequisites:

- You must know the inventory organization for setting up your items. This is the organization selected in the system profile option Service: Validation Inventory Organization.
- The billing type must be set up if you are not using one of the seeded billing types.

To set up inventory items:

1. Under the Inventory responsibility, navigate to Items, then Master Items.

   The Organizations list of values window appears.

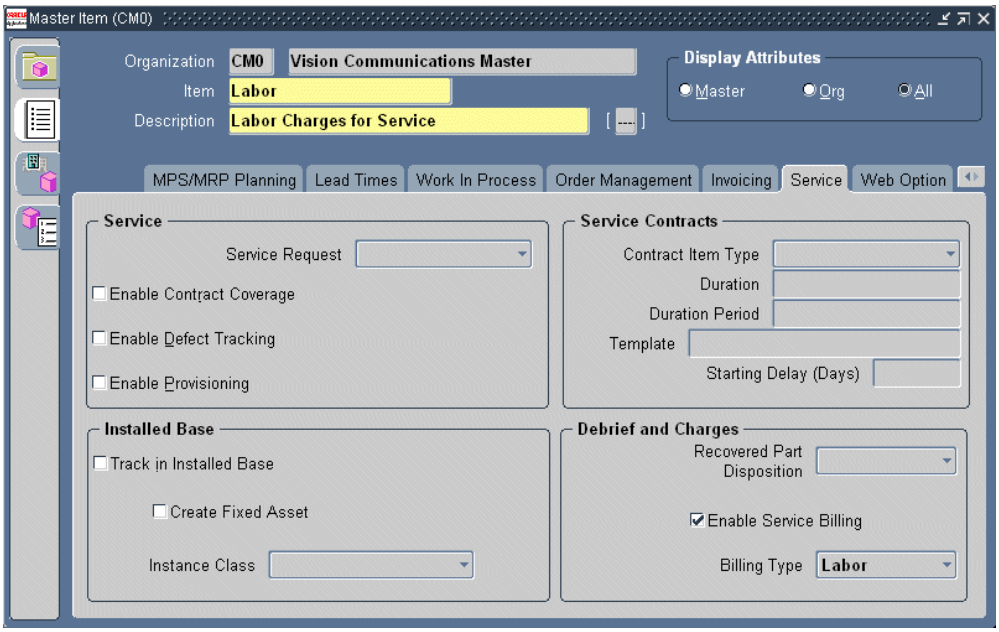
2. Select the Inventory organization in profile option ASO: Product Organization.

   The Master Items window appears.

3. Follow the steps described in *Oracle Inventory User's Guide* to set up your items or verify that existing items have been set up correctly. The following entries and settings are important for service applications:

   - Main Tab
     - Enter item name and description in the Item and Description fields.
     - Entries in the Unit of Measure region are used as the default units of measure in Charges.
   - Inventory Tab
     - Inventory Item check box: Select for all items.
     - Stockable check box: Select for tangible inventory items only. Do not select for labor and expense items.
     - Transactable check box: Select for tangible inventory items only. Do not select for labor and expense items.
   - Order Management Tab
     - Customer Orders Enabled check box: select for all items.
     - Shippable check box: Select for physical items. Do not select for labor and expense items.

4. Select the Service Tab.



5. In the Service region, make one or more of the following optional entries:

   - To make it possible for agents to create service requests for this item, select Enabled from the Service Request list.

   - To make it possible to apply service contracts for this item, select the Enable Contract Coverage check box. You must also select Track in Installed Base check box before you can apply service contracts to it.

   - Select Enable Defect Tracking only if your organization uses Oracle Quality Online.

   - Select Enable Provisioning if this item can be delivered through electronic fulfillment by the Oracle Service Fulfillment Manger (SFM).

6. In the Installed Base region, make one or more of the following optional entries:

   - Select the Track in Installed Base check box to track this item via Oracle Installed Base.

   - If you select the Track in Installed Base check box, then you can select the Create Fixed Asset check box to create a depreciable inventory asset used in Oracle Asset Tracking. See Oracle Asset Tracking documentation for more information.

7. In the Debrief and Charges region:

   1. Select the Enable Service Billing check box.

2. Use the Billing Type list to select a billing type for the item.

   Select a billing type so that agents can enter the item in the Task Debrief (Oracle Field Service) and the Charges tab (Oracle TeleService). Then, you can also define discounts for the item in Oracle Service Contracts.

   Note: The Recovered Part Disposition list is reserved for future use by Oracle Spares Management.

8. Do not enter any value in the Service Contracts Region. This region is used for creating contracts as inventory items. Specifying a Billing Type for an inventory item means that the item can be covered by a contract.

Guidelines for Setting Up Items in Inventory

The tables given below provide you with the guidelines for setting up the Item Master for the three possible types of inventory items: parts, labor, and expenses.

Main Tab

The following table describes the setups on the Main tab of the Item Master window:

Type of Inventory Item	Name	Unit of Measure
Part	Entry Required	Entry Required
Labor	Entry Required	Entry Required
Expense	Entry Required	Entry Required

Inventory Tab

The following table describes the setups on the Inventory tab of the Item Master window:

Type of Inventory Item	Inventory Item check box	Stockable check box	Transactable check box
Part	Selected	Selected	Selected

Type of Inventory Item	Inventory Item check box	Stockable check box	Transactable check box
Labor	Selected	Deselected	Deselected
Expense	Selected	Deselected	Deselected

Order Management Tab

The following table describes the setups on the Order Management tab of the Item Master window:

Type of Inventory Item	Customer Orders Enabled check box	Shippable check box
Part	Selected	Selected
Labor	Selected	Deselected
Expense	Selected	Deselected

Service Tab (Service Region)

The following table describes the setups in the Service region on the Service tab of the Item Master window:

Type of Inventory Item	Service Request drop-down list selection	Enable Contract Coverage check box	Enable Defect Tracking check box
Part	Enabled	Selected	Select only if your organization uses Oracle Quality Online.
Labor	Enabled	Deselected	Deselected
Expense	Enabled	Deselected	Deselected

Service Tab (Installed Base region)

The following table describes the setups in the Installed Base region of the Service tab on the Item Master window:

Type of Inventory Item	Track in Installed Base check box	Create Fixed Asset check box
Part	Enable this check box if the item is to be tracked by Oracle Install Base.	Select only if you selected the Installed Base Tracking check box and the item is a depreciable asset in Oracle Asset Tracking.
Labor	Deselected	Deselected
Expenses	Deselected	Deselected

Service Tab (Debrief and Charges region)

The following table describes the setups in the Debrief and Charges region of the Service tab on the Item Master window:

Type of Inventory Item	Enable Service Billing check box	Billing Type drop-down list
Part	Selected	Select a billing type
Labor	Selected	Select a billing type
Expense	Selected	Select a billing type

References:

Oracle Inventory User's Guide

About Setting Up Labor Schedules for Pricing Labor

Labor schedules determine what your organization charges for labor at different times. There are two places where you can define labor schedules: in Oracle Service Contracts (optional) and in Charges (required).

You must set up the default labor schedule in Charges for each business process as

described in this procedure only if your organization is charging customers for labor using the Debrief window in Oracle Field Service or Oracle Depot Repair.

This setup is required because Debrief does not require agents to select the applicable labor item (the labor rate for the work performed).

This section covers:

- How Charges Determines Labor Charges, page 12-26
- Setting Up the Labor Schedule in Contracts, page 12-27
- Setting Up the Default Labor Schedule, page 12-29

How Charges Determines Labor Charges

The application charges for Oracle Field Service labor in three steps:

1. Agents debrief labor in the Debrief window. Entry of the labor item (containing the applicable labor rate) is optional.

2. If the labor item is not specified, the application determines it based on:

    1. The labor schedule from the selected service contract for the charge line. This schedule is entered in the Oracle Service Contracts' Billing Rates window. See Setting Up the Labor Schedule in Contracts, page 12-27.

    2. The default labor schedule you create using the procedure described in Setting Up the Default Labor Schedule, page 12-29.

        If the agent has worked across multiple time periods specified in a labor schedule, then the application creates multiple charge lines.

        For example, you create a labor schedule with regular time between 8 a.m. and 4:59 p.m.; overtime to be between 5 p.m. and 7:59 p.m.; and double time after 8 p.m. If an agent reports they have worked between 4 p.m. and 9 p.m., then the application creates three charge lines for the customer: one hour of regular time, three hours of overtime, and one hour of double time.

3. The application determines the price.

    The price can be based on the price list alone or, if a contract is specified, in combination with a labor rate. A labor rate modifies or overrides the price list price: you can either specify a percent over or under the price list price or a flat currency amount which overrides the price list price. The labor rate pricing is available only when there is a contract specified for the charge line.

    The concurrent program CSF: Update Debrief Lines creates the charge lines from debrief lines when a task assignment status is changed to Completed, Closed, Cancelled, Rejected, or On Hold.

For charge lines entered directly in the service request and in Oracle Depot Repair, the application looks up the price directly as described in step 3 above.

Setting Up the Contract Labor Schedule

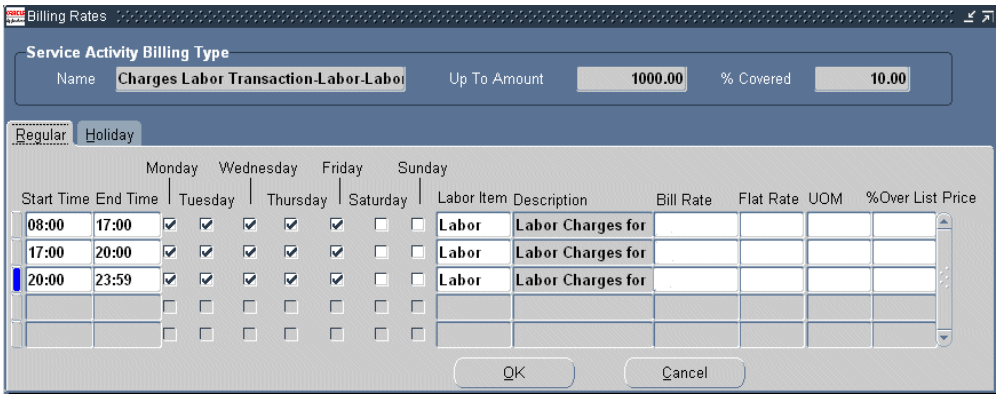
If your organization uses Oracle Service Contracts together with Charges, then you can set up a labor schedule in each contract.

The steps below provide a guideline for entries important to Charges only. Refer to *Oracle Service Contracts Implementation Guide* for more details about this and other contracts related setups.

Guidelines for setting up the labor schedule:

1. Under the Contracts Manager Responsibility, navigate to Launch Contracts.
2. To set up the labor schedule in a single contract:
    1. Select the contract you want to set up and display it in the Service Contracts Authoring window.
    2. Select the Lines Tab.
    3. Select the Effectivities subtab.
    4. Select the service coverage item and click **Edit Coverage** in the Coverage Region.

       The Service Contracts Coverage window appears.
    5. Select the Billing Types subtab.
    6. Select the Business Process and the Service Activity Billing Type pair you wish to set up. The Billing Type must have the Billing Category of Labor.
    7. Click **Billing Rates** to display the Billing Rates window.
3. If you are setting up the labor schedule for a contract template, then navigate to the Billing Rates window following the instructions in *Oracle Service Contracts Implementation Guide.*



4. If you are pricing labor based on labor inventory items, then, on the Regular tab, set up the labor charges for different days and times as follows:

   Note: Make sure the start and end times do not overlap.

   1. Enter the start and end time for the rate.
   2. Select the days this rate is applicable using the check boxes for the days of the week.
   3. Select the labor item to be applied for this time period using the Labor Item LOV.
   4. Leave the rest of the fields blank.

5. To use the labor rates in the contract to override or modify the price, set up the labor charges for different days and times on the Regular tab as follows:

   Note: Make sure the start and end times do not overlap.

   1. Enter the start and end time for each rate.
   2. Select the days this rate is applicable using the check boxes for the days of the week.
   3. Select the labor Inventory item using the Labor Item LOV.
   4. Use the Bill Rate LOV to enter the bill rate. The list of values is based on a lookup.
   5. To specify a price for this rate, enter the currency amount in the Flat Rate field and select a unit using the UOM LOV. Do not make any entries in the %Over

List Price field. This price you enter here overrides the price list price for this contract.

6. To specify a discount or a surcharge for this rate, enter a positive or a negative percentage in the %Over List Price field. A positive number increases the rate an agent enters. A negative number decreases the amount. Do not make any entries in the Flat Rate or UOM fields.

6. Repeat the entries you made on the Regular tab on the Holiday tab to set up the holiday rates.

7. Click **OK** to save and close the window when you are done.

Setting Up the Default Labor Schedule

Use this procedure to set up the labor schedule that is used by charges to supply a missing labor item when none is found in the customer contract or when there is no contract specified for the charge line. You must set up one default labor schedule for each business process.

To set up the time and material labor schedule for a business process:

1. Under the Service responsibility, navigate to Setup, then Charges, and select T&M Labor Schedule.

   The Time & Material Labor Schedule page appears.

2. Use the Business Process LOV to select the service business process.

3. Specify the different labor times and their pricing. For each, line:

   1. Enter the start and end times.

      Note: Make sure that the start and end times of your entries do not overlap.

   2. Select the days the line is applicable using the check boxes for the days of the week.

   3. Select the labor item to be applied for this time period using the Labor Item LOV.

   4. If you are using labor rates in your contracts, then select a billing rate using the Labor Rate LOV.

Note: Labor Rate in this window is the same field as the Bill Rate field in the Contracts' Billing Rates window.

Note: Do not enter a currency rate (Flat Rate) or discount (% Over List Price) for the rate. The application looks these up in a customer contract instead. Please see Oracle Service Contracts documentation for details.

4. Click **Save** .

5. Click **Validate Setup** to validate your entries.

   If your entries do not overlap and the coverage is complete, then a check mark appears in the Validation Completed check box.

Restricting Agent Use of Operating Units for Charge Lines

By default, agents can submit charges against any operating unit to Oracle Order Management. (The charge line displays a default operating unit according to the rules you specify in Setting Up Rules for Defaulting the Operating Unit, page 12-30, but the agent can select a different operating unit using the list of values.)

You can restrict the ability of agents to submit charges against operating units by setting up a security profile and entering that security profile in the system profile MO: Security Profile.

Charges enforces the chosen security profile and provides an error message whenever agents attempt to submit to Oracle Order Management a charge for an operating unit that is not permitted by the security profile.

See *Oracle E-Business Suite Multiple Organizations Implementation Guide* for information on setting up security profiles.

Setting Up Rules for Specifying the Default Operating Unit

When agents enter a charge line, the application automatically supplies a default operating unit based on the rules you set up in this procedure. The operating unit is the financial entity used for billing and receiving payments from the customer.

To set up rules for specifying the default operating unit:

1. Navigate to Setup, then Charges, and select Multi Org Setup.

   The Service Request Multi Org Set Up page appears.

2. Enter the sequence in which you want Charges to look for the value of the defaulted operating unit.

Rule Name	Description
Operating Unit of the Contract	If a contract is associated with the service request, then charges uses the operating unit of the contract.
Operating Unit of the Installed Base Product	If the service request concerns an Oracle Install Base item, then charges picks up the default operating unit of the item.
Profile Option: Service Default Operating Unit	Charges uses the operating unit selected in system profile Service: Default Operating Unit.
Operating Unit Stamped on the Service Request	Charges uses the operating unit associated with the service request.
Operating Unit of the Account Site	The application derives the site operating unit from the bill to party site and the account number. If there are multiple account sites, then the operating unit of the primary bill to account site is selected. Otherwise, the operating unit of the first bill to account site is selected as the operating unit.
Profile Option: MO Default Operating Unit	The operating unit is derived from the profile MO: Default Operating Unit. This rule is considered only if the Service: Restrict Operating Unit by MOAC profile option is set to *Yes*.

The application defaults the first operating unit it finds. For example, if you enter the sequence of 1, 2, 3, 4, 5 and 6, then the application first looks for the operating unit in a valid contract. If there is no contract available, then it checks to see if the service request is for an Oracle Install Base item, and so on until it finds the operating unit.

3. Click **Apply**to save your entries.

Modifying the Display of Charges on Customer Invoices

Normally the customer receives an invoice detailing all individual items agents have entered as charges.

You can use this procedure to create an inventory item with a generic name, called a Roll up Item, to appear on customer invoices instead of the individual inventory items in a billing type. The roll up item does not change what customers are charged, it affects only the name of the item printed on the invoice.

For example, if you have three different overtime labor items, Labor 1, Labor 2, Labor 3, all associated with the Labor billing type. Normally, if the agent specifies the engineer worked for two hours at Labor 1 rate, three hours at the Labor 2 rate, and one hour at the Labor 3 rate, then the customer sees three items on the bill:

- Labor 1: 2 hours
- Labor 2: 3 hours
- Labor 3: 1 hour

By setting up a new inventory item Overtime Labor with the Labor billing type, and creating a roll up item using the procedure below, the customer bill substitutes Overtime Labor for each of the lines:

- Overtime Labor: 2 hours
- Overtime Labor: 3 hours
- Overtime Labor: 1 hour

> **Note:** The roll up item you create does not summarize line items on an invoice. It only substitutes the generic roll up item name for the item names for that billing type.

> **Note:** You can use roll up items for physical items but not for items that are shipped to or received from customers through Oracle Order Management.

Prerequisites:

You must know the correct inventory organization

To set up an inventory item to modify the display of charges in customer invoices:

1. Under the Inventory, Vision Operations responsibility, navigate to Items, then

Master Items and set up the replacement items you wish to appear on the customer invoice. See Setting Up Inventory Items, page 12-20.

2. Switch to the Service responsibility, and navigate to Setup, then Charges, and select Billing Type Attributes.

   The Billing Type Attributes window appears.

3. Use the Billing Type LOV to select the billing type for the inventory items you want to summarize.

4. Select the inventory item you want to use as the roll-up item using the Roll up Item LOV.

5. Save your work.

Setting Up Charges System Profiles

Use this general procedure to set up any of the Charges profiles.

To set up system profiles:

1. Under the Service responsibility, navigate to Others, then Profile System Values.

   The Find System Profile Values window appears.

2. In the Profile field, enter the search criteria. For example: "`Service%charges%`".

3. Click **Find**.

   The profiles matching your search criteria appear in the System Profile Values window.

About Setting Up Remaining Charges System Profiles

Setting up the remaining Charges system profiles to control Charges behavior includes:

- Setting Up the Default Sort Order on the Charges Tab, page 12-33
- Defaulting the Service Request Business Process, page 12-34
- Specifying the LOV Type for Price List, page 12-34

Setting Up the Default Sort Order on the Charges Tab

Agents can decide how to sort the charges displayed in the tab by making a selection from the Sort By list. You can set up the default value by setting the system profile

Service: Charges Default Sort Order to any one of the following:

- Billing Type
- Charge Line Source
- Charge Line Status
- Charge Line Type
- Creation Date
- Order Number
- Service Activity Code

By default, this system profile is set to Creation Date.

Setting Up the Default Service Request Business Process

Charges automatically displays the business process on the service request as the default business process in the charge lines, when the system profile Service: Charges - Default Service Business Process from SR is set to Yes, the default value. If you set this profile to No, the agent must always enter the business process manually.

Specifying the LOV Type for Price List

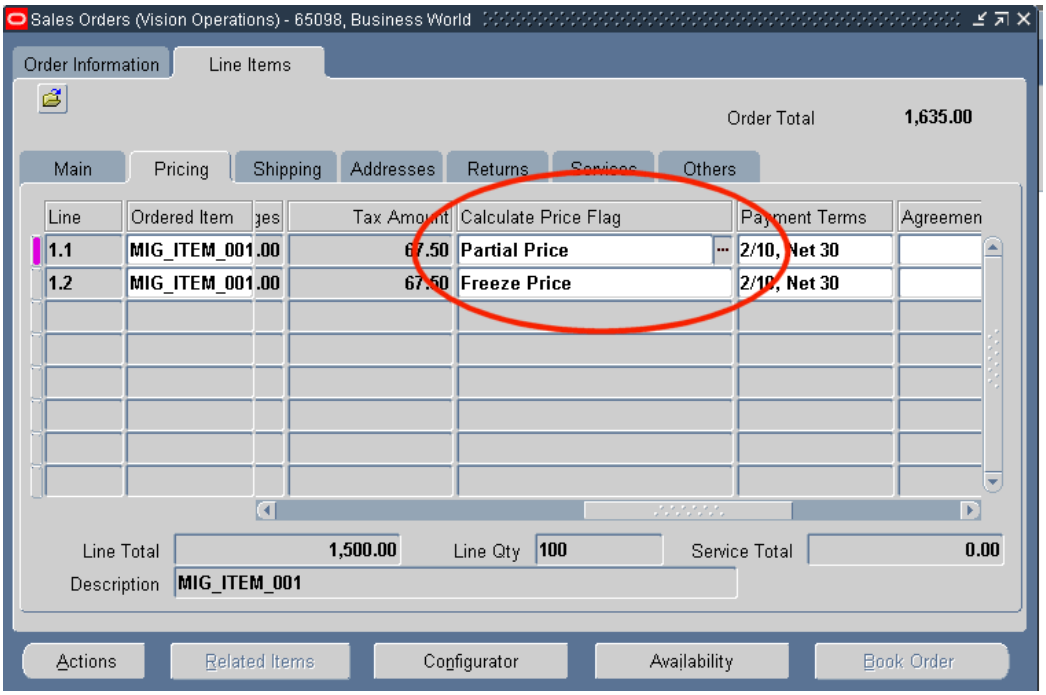
If your organization uses a large number of price lists, you can select to use the long list of values format by setting the system profile Service: Charges - Use Long List LOV for Price List to Yes. This forces agents to enter search criteria before displaying the list of values and thus improves performance. A setting of No, the default value, displays the short list of values format.

Preventing Errors from Recalculating Prices in Oracle Order Management

You can prevent agents receiving application errors when they attempt to use the Sales Order window in Oracle Order Management to recalculate prices of charge lines submitted from Oracle TeleService.

Agents using Oracle Order Management's Sales Order window have the option of recalculating the price of line items by choosing either Partial Price or Calculate Price in the Calculate Price Flag field of the Line Items tab and Pricing Subtab.

The Calculate Price Flag field is highlighted in the following image.



The recalculation may result in an error because the contractual discounts to the prices data may not have passed from Oracle TeleService to Oracle Order Management.

To prevent the recalculation error, use this procedure to create a dummy price modifier to be passed by Oracle Charges if the agent requests a recalculation.

To prevent pricing recalculation errors in Oracle Order Management:

1. Under the Order Management, Super User responsibility, navigate to Pricing, then Modifiers, and select Modifier Setup.

2. In the Main tab header, enter Discount List as the Type.

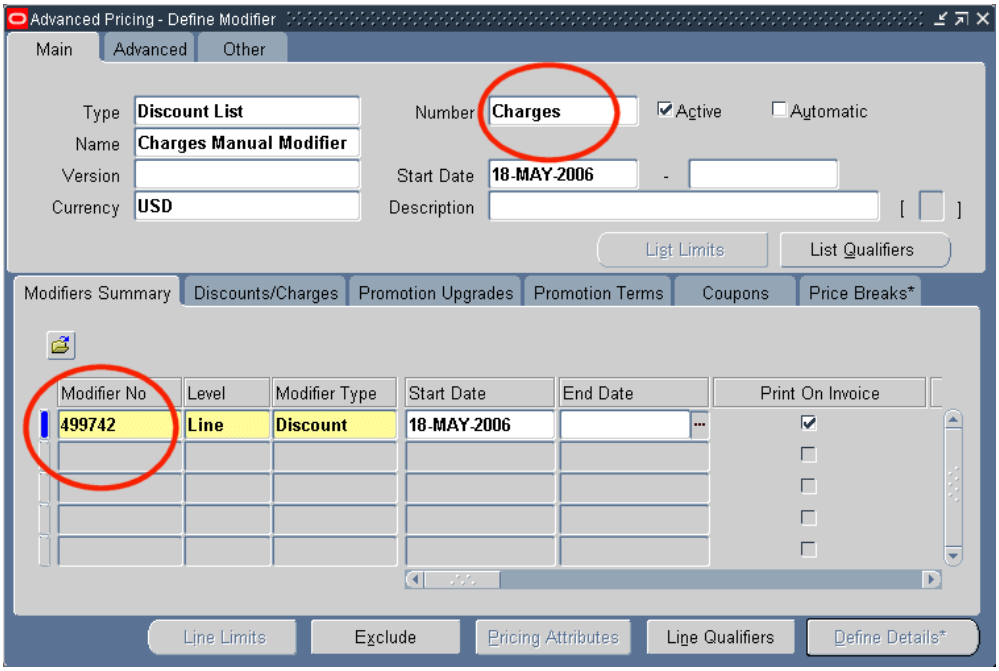
3. Enter any name.

4. Enter an easy to remember string in to the Number field. You will need this later to identify the modifier.

5. Enter a start date.

6. On the Modifiers Summary subtab, the number in the Modifier No field is generated automatically. Make a note of this number because you will need it to identify the modifier later.

   The two modifier number fields you need to remember are highlighted in the image below.



7. For Line, choose Line.
8. For Modifier Type, choose Discount.
9. Enter a start date.
10. For the Pricing Phase, choose List Line Adjustment.
11. Select the Discounts/Charges tab.
12. For Application Method, choose Percent.
13. Enter 10 or any other number in Value.
14. Switch responsibility to Service.
15. Navigate to Others, and select Profile System Values.
16. Set the system profile Service: Default Manual Modifier to a modifier you have set up. You can search the list of values by the automatically generated modifier number and the string you enter in the Number field.

Setting Up Charges User Hooks

Oracle TeleService provides a user hook that enables you to execute custom logic for the retrieval of prices for Charge line items.

Pricing API User Hook

The Pricing API user hook enables you to embed custom logic for the retrieval of prices for Charge line items. You can calculate the price of an item based on pricing rules such as modifiers, qualifiers, and price breaks defined in Advanced Pricing.

To execute the user hook:

1. Define a PL/SQL package `CS_CHARGE_DETAILS_CUHK` for the procedure that is invoked by the user hook. The package may already exist if you have used other Charges user hooks.

2. Define procedure `Call_Item_Pricing_Pre` to be invoked by the user hook. This is the user hook for the Charges Pricing API. It must be defined with the following parameters in the `CS_CHARGE_DETAILS_CUHK` package.

```
PROCEDURE Call_Pricing_Item_Pre (
  p_inventory_item_id  IN NUMBER,
  p_price_list_id   IN NUMBER,
  p_uom_code     IN VARCHAR2,
  p_currency_code   IN VARCHAR2,
  p_quantity     IN NUMBER,
  p_org_id      IN NUMBER,
  x_list_price    OUT NUMBER,
  p_in_price_attr_tbl  IN ASO_QUOTE_PUB.Price_Attributes_Tbl_Type,
  x_return_status   OUT NOCOPY VARCHAR2,
  x_msg_count    OUT NOCOPY NUMBER,
  x_msg_data     OUT NOCOPY VARCHAR2);
```

   Note: You must implement the logic in this procedure to calculate the price of an item on the charge line.

3. Verify user hook registration. All user hooks need to be registered in the JTF User Hooks Framework. Your System Administrator must execute a query on the database command line to verify, as no UI is available to do this.

```
Select count(*) from jtf_user_hooks where api_name =
'Call_Pricing_Item';

The value returned should be 1.
```

4. Enable the user hook. You need to enable the user hook so that it is executed in the Charges module.

   The System Administrator must execute a statement on the database command line to enable to user hook, as no UI is available to do this.

```
UPDATE jtf_user_hooks SET execute_flag = 'Y'
WHERE pkg_name = 'CS_CHARGE_DETAILS_PVT'
AND api_name = 'CALL_PRICING_ITEM'
AND processing_type = 'B'
AND user_hook_type = 'C'
```

Note: To disable the user hook, replace the execute_flag='Y' with execute_flag='N' in the SQL statement.

Setting Up Charges Submission

When charges are submitted in Oracle TeleService, this data is sent to Oracle Order Management (OM) to process these charges. Oracle CRM uses the party or the party site level details whereas Oracle Order Management uses the account or account site details. You must set up profile options to create an account or account site in Oracle Order Management.

Sold To Account Validation

If...	Then...
Sold to Party has at least one account but Sold to Account is null	An error is displayed and the charges submission process is aborted.
Sold to Party does not have any account	Charges are submitted based on the value specified in the Service: Action for Missing Account/Account Site in Charges profile. If the profile is set to Abort Submission of Charges, then an error is displayed and the process is aborted. If the profile is set to Allow Automatic Creation of Account/Account Site, then an account is automatically created.

Bill To/Ship to Validation

If...	Then...
Party Site and Account values exist	If there is at least one active account site or account site usage for the party site, account, and operating unit, charges are submitted to Order Capture. If an account site or account site usage doesn't exist for the party site, then data is submitted to Order Capture based on the value specified in the Service: Action for Missing Account/Account Site in Charges profile. If the profile is set to Abort Submission of Charges, then an error is displayed and the process is aborted. If the profile is set to Allow Automatic Creation of Account/Account Site, then an account or account site usage is automatically created.
Account value exists	The Sold To Party account data is sent to Order Capture and an order is created without an account site.
Only Party Site value exists	Charges passes the first account that satisfies the criteria, along with the operating unit and party site to Order Capture. If an account is not found, then the Service: Action for Missing Account/Account Site in Charges profile is referenced. If it is set to Abort Submission of Charges, the process is aborted with an error. Else, an account or account site is automatically created.

13

Integration with Oracle Projects

Overview

Oracle Projects is used for managing small and large-scale projects that involve many tasks and milestones within an organization. Oracle Service integrates with Oracle Projects to enable cost identification and cost generation for a project.

Oracle Service leverages the costing feature of Oracle Projects so that when project tasks are executed in the field, the cost incurred on each activity is captured and posted to the appropriate GL account.

Key Terms and Definitions

Some of the key terms and definitions are as follows:

- **Expenditure**

  A group of expenditure items incurred by an employee or an organization for an expenditure period.

- **Expenditure Type**

  A classification of cost that you assign to each expenditure item. Expenditure types are user-defined.

- **Expenditure Type Class**

  An additional classification of expenditure types that indicates how EBS Projects processes the expenditure types. For example, if you run the Distribute Labor Costs process, EBS Projects will calculate the cost of all expenditure items assigned to the Straight Time expenditure type class. This term is formerly known as System Linkage.

- **Expenditure Organization**

The organization where the expenditure or cost is incurred. An expenditure organization must be defined as an organization with the classification 'Project Expenditure/Event Organization'.

- **Project**

  A unit of work that requires resources to produce measurable results. A project can be broken down into one or more tasks.

- **Project Task**

  A subdivision of project work. Each project can have a set of top tasks and a hierarchy of subtasks below each top task. (A project task is not the same object as a service task.)

- **Transaction Source**

  A transaction source identifies the source of external transactions that you import into Oracle Projects. The transaction source determines how Oracle Projects imports the transactions.

Integration with Oracle Projects

Oracle Service leverages Oracle Order Management and Oracle Accounts Receivables to report revenue to Oracle General Ledger. You can also use Oracle Projects to generate and post costs to appropriate GL accounts. Oracle Projects can generate revenue based on costs from service related activities.

Oracle Service tracks costs from executing tasks out in the field such as installing a huge cell tower or overhauling a wind turbine. You can use Oracle Projects to generate costs from these tasks. Costs include labor, expense, and material costs, which are posted back into Oracle Projects in order to carry out proper reporting and accounting for the project.

In Oracle Service, costs are tracked by service activity. A service activity represent activities that you want to track for financial purposes. When creating a cost for the service request, the Create Cost attribute is checked for the service activity. If this attribute is selected, then costs records are created for the service request and stored in the Service schema. For more information, see, Capturing Costs, page 56-1.

The costs that are generated in Oracle Service can be posted as expenditures in Oracle Projects interface table through the Interface Service Costs to Projects concurrent program. For each valid transaction, the Transaction Import process imports the transactions and creates corresponding expenditure records in the Oracle Projects expenditure tables; expenditure records include expenditure batches, expenditures, and expenditure items. For each invalid transaction, Transaction Import rejects the transaction and updates the transaction in the interface table with a status of Rejected and the rejection reason.

Process Overview

Implementation Considerations

Avoid Duplicate Cost Reporting

Oracle Service also uses Oracle Order Management and Oracle Accounts Receivables to report costs. If you are implementing the integration with Oracle Projects, then you must ensure that costs and revenue are not reported multiple times in Oracle Projects. You must choose either cost reporting in Oracle Order Management and Oracle Accounts Receivables or cost reporting in Oracle Projects.

Similarly, Oracle Projects has integration with many Oracle applications, including Oracle Inventory, Oracle Time and Labor, and Oracle Project Manufacturing. Costs can be passed from these applications to Oracle Projects. Hence, you must ensure that duplicate costs are not reported in Oracle Projects.

As Oracle Inventory has integration with Oracle Projects and can push costs from inventory to Oracle Projects, project and project task details can also be associated with item locators. If you are using Oracle Inventory to post costs in Oracle Projects, then you must hide or not use the project-related fields on the Field Service material debrief lines or Charges material lines such that costs are not posted twice.

Interfacing Costs in Oracle Projects

The PA_TRANSACTION_INTERFACE_ALL interface table is a staging location for project transactions before they can be physically loaded into Oracle Projects. Every application that needs to integrate with Oracle Projects must first stage their relevant data in the interface table. Data can be directly written into the table as no table handlers or APIs are available.

Every row in the interface table constitutes an expenditure line in Oracle Projects. During the import process, Oracle Projects validates the data before they are imported. The validation to be performed varies, depending on the expenditure type class chosen for the row.

You must also review the columns in the interface table to determine if the way Oracle Service derives these values fit your requirements. You can use custom logic to post the cost records into the PA_TRANSACTION_INTERFACE_ALL table or provide logic to perform additional steps after the cost records are entered into the interface table.

Implementation Prerequisites

Before you use Oracle Projects for capturing costs, you must implement the following:

Oracle Project Costing

Oracle Project Costing must be implemented as per the steps mentioned in Oracle Project Costing Implementation Checklists. As a part of this step, you are required to define expenditure categories, expenditure types and transaction sources.

Transaction Sources

Out of the box, Oracle Service provides three predefined transaction sources when posting cost records to Oracle Projects – Service Material, Service Labor, and Service Expense. However, you can define transaction sources in Oracle Projects as per your business requirements. For more information on the transaction sources, see Oracle Projects Costing User Guide.

Service Costing

You must enable Service Costing as per the steps outlined in Setting Up Service Costing. As part of this step, you are required to define the costing method you want to implement, setting up the material item and its cost in Oracle Inventory. However, you must avoid duplicate reporting of item costs as Oracle Inventory also integrates with Oracle Projects.

Service Activities and Billing Types

A service activity is the type of work that field service, depot, and call center agents use to classify work performed on behalf of a customer. Costs are generated in Oracle Service based on the service activity selected for the service request. You can specify multiple billing types for each service activity. The Create Cost and Create Charge attributes for each service activity must be enabled to generate costs and charges respectively.

For each service activity, define billing types. Billing types are used to categorize items in inventory for use in service applications. By associating billing types with service activities you determine what items an agent can enter in a charge line for a given activity. For more information, see Setting Up Service Activities, page 12-16.

You must specify the expenditure type class, expenditure type and the transaction source for the billing type to post the cost records in Oracle Projects. The Interface to Projects attribute for a billing type determines if the cost must be posted in Oracle Projects when the Interface Service Cost to Projects concurrent program is run.

Interfacing Service Costs with Oracle Projects

When a cost record is created in Oracle Service it is posted to the Oracle Projects' interface table by the Interface Service Costs to Projects concurrent program. Cost records whose corresponding charge lines are submitted, or debrief lines are completed are posted to the interface table. Each cost record that is successfully posted to the interface table in Oracle Projects is marked so that it does not get posted again. You can

also execute custom logic to populate the interface tables, as per your requirements overriding the logic provided by the concurrent program.

After the interface program is run a log file is created to track errors and exceptions for debugging.

You can specify any of the following parameters to run the concurrent program.

Parameter	Description
From Transaction Date	Cost records created between a certain date range.
To Transaction Date	Cost records created between a certain date range.
Project Number	Costs for a particular project.
Project Task Num	Costs for a particular project number and task number.
Service Activity Code	Costs for a particular service activity code.
Billing Type	Costs for a particular billing type. In Oracle Service, this means that they can only push labor costs, material costs, or expenses.
Service Request Number	Costs for a particular service request number.
Service Request Status	Costs for service requests of a particular status.
Source	Costs from either Service Request or Field Service Debrief.
Source Number	Costs for a specific source. If the source is Field Service, specify the debrief number.
Operating Unit	Costs for a particular operating unit.
Inventory Org	Costs for a particular inventory organization.
Expenditure Org	Costs for a particular expenditure organization.

Using Oracle Projects for Reporting Costs

The following examples outline how you can use Oracle Projects in reporting costs.

Example 1: Using Project Information in Service Requests (for Field Service Tasks)

1. Update an existing service request or create a service request.
2. Select an expenditure organization, project number, and project task number and save the service request.
3. Create field service tasks using the task type for the service request.
4. Assign and schedule the tasks to field service technicians.
5. Complete and debrief the tasks (This task is done by Field Service technicians.)
6. View the converted debriefs to cost records in the View Cost Details page.
7. Run the Interface Service Costs to Projects concurrent program to post the cost records in Oracle Projects interface table.
8. Run the Transaction Import process to import the interface table records into Oracle Projects.
9. View the expenditures in Oracle Projects and drill down to cost details.

Example 2: Using Project Information in Service Requests (for non Field Service Tasks)

1. Update an existing service request or create a service request.
2. Select an expenditure organization, project number, and project task number and save the service request.
3. Create tasks using the task type for the service request.
4. Create a charge line for the task.
5. View the cost records in the View Cost Details page.
6. Run the Interface Service Costs to Projects concurrent program to post the cost records in Oracle Projects interface table.
7. Run the Transaction Import process to import the interface table records into Oracle Projects.

8. View the expenditures in Oracle Projects and drill down to cost details.

14

Setting Up Application Search

This chapter covers the following topics:

- Application Search Overview
- Setting Up E-Business Suite Secure Enterprise Search
- Enabling the Application Search Region
- Enabling the Application Search Menu
- Setting Up Permissions
- Predefined Data for Application Search

Application Search Overview

Oracle Application Search uses Oracle Secure Enterprise Search to enable keyword search on applications data. It provides full text search services on application content for both application and SES users.

Using the Application Search framework, users can search service requests by a combination of search criteria such as summary, customer, account, contact, status, severity, product etc. This search is possible in the following applications:

- Contact Center
- Customer Support
- Service Desk
- Case Management

Application Search can be initiated from Agent Dashboard only from Customer Support, Service Desk, and Case Management. For Contact Center and Service Request forms, the user has to go to the Home page and click the Application Search link to initiate Application Search.

Setting Up E-Business Suite Secure Enterprise Search

Application Search uses Oracle's Secure Enterprise Search to enable a simple and powerful keyword search on Oracle Applications data. For information on how to use and administer Oracle E-Business Suite Secure Enterprise Search, see *Oracle E-Business Suite User's Guide* and *Oracle E-Business Suite Maintenance Guide*.

Enabling the Application Search Region

Application Search region is an OA region from where an agent can search service requests. The Application Search region is hidden in the Agent Dashboard for Customer Support, Service Desk, and Case Management applications and can be enabled using OA Personalization.

Follow these steps to enable the Application Search region for Customer Support module:

1. Under Customer Support Specialist responsibility, navigate to Customer Support, Queued Work Selection.
2. Click the Personalize Page link, and the Personalize Page: Agent Dashboard page appears.
3. Click the Personalize Properties icon in the Layout page, to view the personalization structure.
4. Click the Personalize icon for Row Layout: (AppSearchRL)
5. Set the value of Rendered to True, and click Apply to save the changes.

> **Note:** Navigate to the Agent Dashboard, under the Service Desk Analyst responsibility, and under the Case Worker responsibility, for Service Desk and Case Management modules, respectively. From the Agent Dashboard, you must follow the personalization steps described above to enable the Application Search region in these modules.

Enabling the Application Search Menu

To enable service request search for Service Request and Contact Center forms, you must assign the Contact Center SES menu to the root menu of the responsibility that is used to access these forms.

To assign this menu to Service responsibility, do the following:

1. Under System Administrator responsibility, navigate to Application, Menu.

2. Query for CSX_CUSTOMER_SUPPORT menu.

3. Add Contact Center SES Menu as its submenu, and click Save.

Setting Up Permissions

Application Search framework uses Permission Sets to secure SES search in Oracle Applications by responsibility. Four Permission Sets are available for Oracle TeleService:

- Cases (SESG_CS_CM_PERMISSION_SET) for Case Management
- Service Request (SESG_CS_SD_PERMISSION_SET) for Service Helpdesk
- Service Requests (SESG_CS_SD_PERMISSION_SET) for Customer Support
- Service_Requests (SESG_CC_SD_PERMISSION_SET) for Contact Center

To view permission sets, under the Functional Administrator responsibility, navigate to Permission Sets, and query for the permission sets by code.

Predefined Data for Application Search

The following objects have been predefined to enable SES search for service request in Service applications. For more details see the *EBS-SES User Guide*.

	Customer Support	Service Desk	Case Management	Contact Center/Service Request Forms
Grants	Customer Support Searchable Grant	Service Desk Searchable Grant	Case Management Searchable Grant	Contact Center Searchable Grant
Permission	Service Requests	Service Request	Cases	Service_Requests
Search Object	Customer Support Search Object	Service Desk Search Object	Case Management Search Object	Contact Center Search Object

	Customer Support	Service Desk	Case Management	Contact Center/Service Request Forms
View Object	Oracle.apps.cs.csz.incident.server.CustomerSupportVO	Oracle.apps.cs.csz.incident.server.ServiceDeskVO	Oracle.apps.cs.csz.incident.server.CaseMgmtVO	Oracle.apps.cs.csz.incident.server.ContactCenterVO

15

Setting Up InQuira Search

This chapter covers the following topics:

- Overview
- Setting Up Inquira Search

Overview

InQuira is a complete and intelligent search interface that enables Contact Center agents to quickly and easily find accurate answers to customer inquiries from the Customer Support dashboard. InQuira search capability automatically incorporates customer context, call context, and CRM contextual information in search of answers to customer inquiries.

The answers are more than just mere links to source content; they also include relevant excerpts that have a high probability of answering an inquiry based on their intent.

Setting Up Inquira Search

To search the knowledge base using InQuira, you must set the *Knowledge: Search to display for integrating applications* profile option to *InQuira Search*.

You can search for solutions and link them to a service request. Any other agent, who can access the service request can view the linked solutions in the Solutions subtab on the Update Service Request page.

After the profile option is enabled, you can access InQuira Search page from the Service Request window, Service Request tab of the Contact Center or from the Tools1 menu.

16

Implementing Work Assignment and Distribution

This chapter covers the following topics:

- Overview of Key Work Assignment and Distribution Concepts
- Overview of Service Request and Task Assignment
- How the Application Assigns Work in Automatic Assignment
- General Procedure for Setting Up Work Assignment
- Automatically Assigning Service Requests to Groups
- Automatically Assigning Service Requests to Individuals
- Automatically Assigning Service Request Tasks to Groups
- Automatically Assigning Service Request Tasks to Individuals
- Guidelines for Setting Up Service Territories
- Guidelines for Setting Up Calendars, Shifts, and Exceptions
- About the Load Balancing Formula
- Setting Up the Load Balancing Formula
- Specifying the Numerical Equivalents for Skill Levels
- General Procedure for Setting Up Work Distribution
- Turning On Work Distribution and Synchronizing Work Data

Overview of Key Work Assignment and Distribution Concepts

This section describes the key concepts you need to understand work assignment and distribution.

Work Types

Agents get their work either in the Dashboard page (in HTML modules including Customer Support, Service Desk, and Case Management) or in the Universal Work Queue window. Work can come in either in the form of service requests or tasks.

Service Requests

Service requests are designed to track the resolution of a customer issue from the initial customer contact to closure. They can be created either by Contact Center agents or by customers themselves on their Oracle iSupport Web portal.

Tasks

Tasks track specific items of work to be performed by individuals other than the service request owner. There are two types of tasks:

- Service request tasks
- Tasks related to customers rather than service requests

Service request tasks are tasks related to the resolution of the service request. They can be created by an agent while working in a service request or by the application automatically. You can use service request tasks to assign work to:

- Other agents in the organization who must collaborate and contribute to the resolution of the problem.
- Field Service dispatchers who schedule and dispatch engineers to the site.

Agents in the Contact Center can also create tasks related to a customer or contact rather than a service request, for example, tasks for an agent to call a customer back or attend a meeting. These types of tasks can be viewed only from the Contact Center or from the generic Task user interface and are not subject to work distribution as discussed in this chapter.

Tasks are required to resolve customer issues that involve orchestrating multiple resources, for many simple customer issues service requests suffice.

Work Assignment and Work Distribution

Getting work to agents is a two step process:

1. Assignment

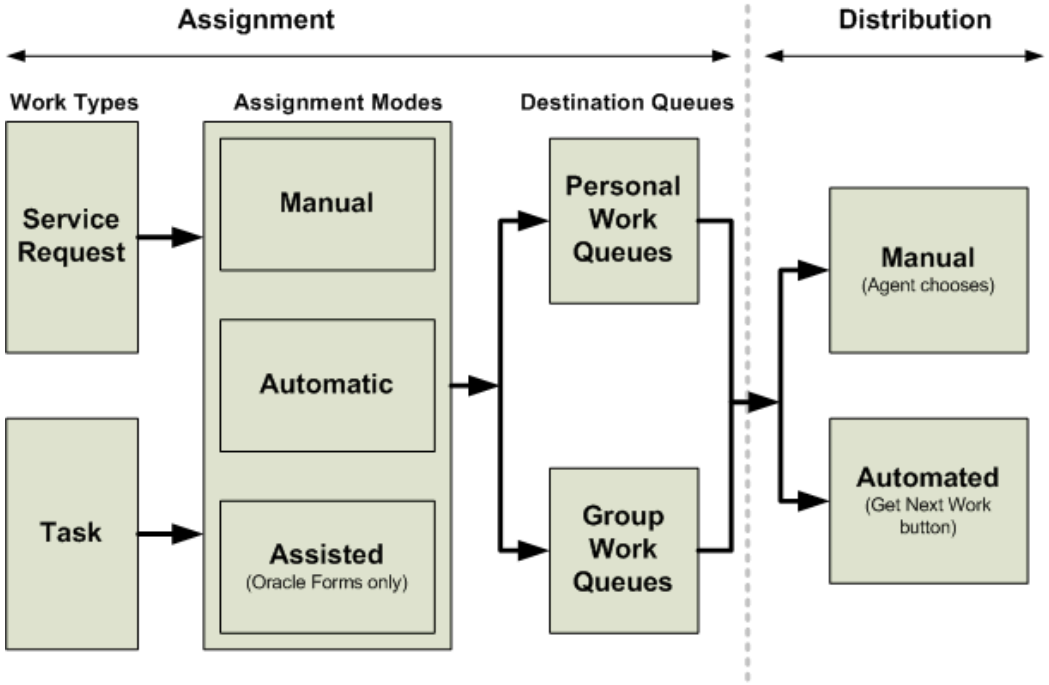
   The application assigns work either to group or personal work queues.

2. Distribution.

   Agents choose which item to work on from a work queue or they click a button and

the application decides which item to open for them. The action of choosing and opening up a work assignment is called work distribution in this chapter.

The following diagram illustrates the process:



Assignment

Work assignment is a process of assigning work, service requests and tasks, to work queues.

The application assigns work either to groups or individuals, ending up either in group queues or in the agents' personal work queues. The "Unassigned" work queues displayed in the Agent Dashboard page (Customer Support, Service Desk, and Case Management) display all the work assigned to the groups the agents belong to.

There are three modes of work assignment:

- Manual

  Agents assign service requests and tasks to group or individual owners using the list of values in the user interface.

- Automatic

  The application assigns owners to service requests and tasks based on resources found in contracts, the install base, or service territories. See How the Application Assigns Work in Automatic Assignment, page 16-9 and When Automatic Work Assignment Gets Triggered, page 16-7.

- Assisted

  Agents using the Contact Center and Service Request windows have an additional option; they can use the Assignment Manager window to assign ownership based on resources in the service contracts, install base, and service territories.

The first two modes are available in all the Oracle TeleService modules. The last is available only for users of Contact Center and Service Request windows.

Distribution

After work has been assigned there are two basic modes of distributing it:

- **Manual: The agent decides**

  Agents pick what they want to work on from any of the work queues available to them. There are two variations, depending on whether the work is assigned to groups or to personal work queues:

  - From Unassigned Queues (or Group Queues)

    If work is assigned to groups, then agents choose from their unassigned (or group) service request and task work queues. The unassigned queue lists unassigned work for all the groups the agent belongs to.

    The unassigned queue is available in Customer Support, Service Desk, and Case Management. Agents using the Universal Work Queue window get their unassigned work from group queues. These queues list all work assigned to the group whether or not the work is already owned by another agent.

  - From Personal Queues

    If work is assigned to individual agents, agents can still choose what to work on but their choice is restricted to the work assigned to their personal service request and task work queues.

- **Automated: The application decides**

  Whenever agents need more work, they click the Get Next Work button (or the Apply and Next button) and the application opens the next most important work item be it a service request or a task. The application picks the item from both the personal queue of the agent and group work queues the agent can access.

  > **Note:** Different modules include slight variations on the Get Next Work button:
  >
  > - In the HTML-based application modules, agents use the Get Next Work button on the Dashboard. When they are updating a service request or a task, they instead click Apply and Next to save the current work item and obtain the next.

- In the Universal Work Queue window, the Get Next Work button is labeled Next Work. (The two buttons are identical in function).

Agents may choose to work on items in their personal service request and task work queues rather than clicking the button, for example, to close out service requests that can be deemed to be resolved because customers have not responded to repeated calls and messages.

Note: You can set up different distribution modes for tasks and service requests.

How the Application Decides Work Priority for Automated Distribution

This section explains how the application calculates the next most urgent work item to deliver via the Get Next Work (Next Work) button.

Service Requests

For service requests, the application determines the most important work item based on:

- Priority Code
- Due date

The Priority Code is a classification of service severities. You classify severities with priority codes, which can have a value of 1, 2, 3, or 4, in the Service Request Severities setup window. (See Setting Up Service Request Severities, page 7-19.)

If multiple service requests have the same priority code, then the application looks at the due dates as well.

The due date of a service request is determined on the basis of entries in the Respond By/Responded On and Resolve By/Resolved On date fields:

- If there is no entry in the Responded On field, indicating the customer has not yet been contacted, then the Due Date is the date and time indicated in the Respond By field.
- If the service request has been responded to, then the Due Date is the date and time in the Resolve By field.

The information used to calculate the due date, such as the Respond By and Resolve By dates, comes from the SLA in the service contract attached to the service request.

The SLA details are entered in the Coverage Template attached to each service request contract. If no contract is applicable, then the application uses the default service level

agreement specified in the Coverage Template specified in the system profile Service: Default Coverage for SLA. You can set up the Coverage Template under the Service responsibility by navigating to Setup, then Definitions, and selecting Coverage Templates and following the procedure outlined in Setting Up Default Response and Resolution Times, page 7-34.

If you do not implement Oracle Service Contracts and you do not set up the default SLA, then the application does not calculate a due date and assigns on Priority Code only.

Tasks

The application decides the most important task based on:

- Task priority
- Due date

Task priorities can be set up as any integer. The Universal Work Queue application calculates priority based on just four levels: 1, 2, 3, and 4. This means that any task priorities above 4 are assigned to be 4 for the purposes of the calculation. The following table provides an example:

Task Priority	Priority Used in Calculation
1	1
2	2
3	3
4	4
5	4
20	4

If multiple tasks have the same priority, then the application orders the tasks by their due dates.

The due date of a task is the scheduled end date or, if that is not available, the planned end date. The planned end date is the more tentative of the two dates.

When agents use the Get Next Work button, the application does not assign a service request task unless the parent service request has already been assigned to an agent.

Tasks do not inherit the priorities of their parent service requests, however. So, if the application is assigning tasks from service requests with different priorities, the

application takes only the task priority and task due dates into account.

When Automatic Work Assignment Gets Triggered

If you set up and enable automatic work assignment, then it gets triggered whenever:

- A customer creates a service request on their Oracle iSupport Web portal
- An agent creates a service request but does not enter an owner. (This occurs only if you do not set up system profile Service: Default Group Owner for Service Requests to default the owner).
- An agent deletes the entries in the Group Owner field, the Individual Owner field, or both in a service request and saves.
- A new task is created either by the agent or the application without a specified owner.
- An agent deletes the entry in the task owner fields and saves.

You can have the work assigned either immediately on creation and update or in batch mode by periodically running a concurrent process.

Overview of Service Request and Task Assignment

Organizations have spread their support operations globally in strategic locations to reduce resolution time, and to monitor and work on issues round the clock. When an issue is reported, to ensure quick response and resolution, the issue needs to be routed to a resource who is available. This means that the resource is working at the time the issue is reported and is not on a holiday. Organizations can use the components within the Common Applications Calendar module to define and control a resource's available and unavailable times. The Assignment Manager uses the Common Applications Calendar components to determine the most appropriate resource for service request or task assignment.

The following must be defined for the Assignment Manager to assign service requests and tasks efficiently.

1. Time zone for the resource
2. Calendar for a resource
3. Shifts to define the availability time for the resource
4. Holidays or exceptions to define the unavailability or holiday time for the resource

You must then assign shifts, exceptions, and resources to a calendar respectively.

Profile Options to Enable Automatic Assignment of Service Requests and Tasks

You can enable or disable checking for a resource's availability through calendars by setting up the following profiles:

- Service: Check Resource Calendar Availability for SR Auto Assignment – This profile option indicates if the Assignment Manager must check the Calendars, Shifts, and Exceptions associated with resources that are returned from Install Base, Contracts, or Territories to determine the availability of the resource for service request automatic assignment.

  Yes - Indicates that the Assignment Manager must check the availability of a resource using Calendars, Shifts, and Exceptions. If the resource does not have a Calendar, Shift, or Exception, it is not considered for service request assignment.

  No - Indicates that the Assignment Manager must ignore the Calendars, Shifts, and Exceptions associated with resources for service request assignment.

- Service: Check Resource Calendar Availability for Task Auto Assignment - This profile option indicates if the Assignment Manager must check the Calendars, Shifts, and Exceptions associated with resources that are returned from Install Base, Contracts, or Territories to determine the availability of the resource for task automatic assignment.

  Yes - Indicates that the Assignment Manager must check the availability of a resource using Calendars, Shifts, and Exceptions. If the resource does not have a Calendar, Shift, or Exception, it is not considered for task assignment.

  No – Indicates that the Assignment Manager must ignore the Calendars, Shifts, and Exceptions associated with resources for task assignment.

If the above profile options are set to "Yes," then during the service request or task assignment process, the Assignment Manager considers the following resources:

- Resources with an active shift at the time of service request or task creation, that is, the service request or task creation time must fall within the shift pattern defined for that resource.

- Resources must not be on holiday. The day, date, and time when the service request or task is created must not be defined as an exception in the resource's calendar

The Assignment Manager eliminates:

- Resources for whom calendars, shifts, and exceptions are not defined.

- Resources who are on holiday when the service request or task is created, and

- Resources that do not have an active shift, that is, the time of service request or task creation falls outside the shift pattern defined for that resource.

Shifts and exceptions are defined in the calendar in the local time. The active shift for resources is determined by converting the working hours into one common time zone, which is the server time zone. This conversion makes it easy for determining the

availability of resources, thereby ensuring efficiency of request or task assignment.

How the Application Assigns Work in Automatic Assignment

The application decides where to assign work based on preferred and excluded resources specified in Oracle Service Contracts and in Oracle Install Base and by using service territories you set up in Oracle Territory Manager.

The application follows slightly different procedures for assigning service requests and tasks.

Service Request Assignment

Service requests can have both group and individual owners. You must specify whether you want to assign to groups only or to groups and a specific individual within that group by setting the system profile Service: Service Request Owner Auto Assignment Level. The available settings are:

- **Group**: Assigns the service requests to the group only.
- **Individual**: Assigns the service request to a group and an individual member of that group

How the Application Assigns Service Requests to Groups

To distribute service requests to groups, the application:

1. Searches all applicable service contracts for preferred and excluded group resources. (Oracle Install Base does not support groups.)
    - If the process finds a preferred group, it assigns ownership in this step and terminates. If it finds multiple preferred groups, then ownership is assigned to the first group found. Individual resources and excluded resources are ignored.
    - If it does not find a preferred group, it passes any excluded groups to the next step.
2. Searches for qualified resources using service territories

    If the applicable contracts do not specify group ownership, then automatic assignment searches for group owners using the service territories you set up with Oracle Territory Manager, eliminating any excluded resources specified in the last step.

    If multiple groups qualify as potential owners, then the process assigns ownership to the first group on the list that was not excluded in the last step. If no groups qualify, then the user receives an error message.

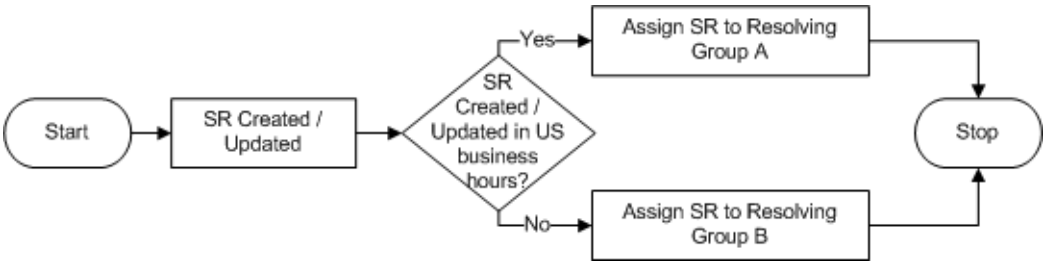
Note: All methods of work assignment require you to set up assignment of service requests to groups. Even if you are assigning service requests to individuals, the application assigns service requests to the group first and then chooses only those individuals that belong to that group.

3. Searches for qualified resources using calendars, shifts and exceptions

   If the Service: Check Resource Calendar Availability for SR Auto Assignment profile option is set to Yes, then the Assignment Manager checks the resources' availability before determining assignment. If the above profile option is set to No, then the Assignment Manager assigns ownership to the first group found.

   If there are different resolving groups that cover different time zones, then all service requests are routed to the resolving group with active shift patterns at the time of service request creation.

   For example, resolving group A works during the US normal working hours, which is 9 am- 5 pm PST and another resolving group B that works during the Australian normal working hours which is, 9 am – 5 pm AWST. When a service request is created during the US business hours, then group A qualifies as a resource to which the service request can be assigned, irrespective of the time zone from which the service request was reported from. If the request was created during the US out of office hours, it will be assigned to group B.



Note: All methods of work assignment require you to set up assignment of service requests to groups. Even if you are assigning service requests to individuals, the application assigns service requests to the group first and then selects individuals that belong to that group.

How the Application Assigns Service Requests to Individuals

Here is how the application identifies the individual service request owner.

It:

1. Performs assignment to groups as described above.

Note: The application performs the rest of these steps only when system profile Service: Service Request Owner Auto Assignment Level is set to Individual.

2. Searches all applicable service contracts and the install base for preferred and excluded individual resources.

   - If the process finds preferred resources here, it puts them on a list of potential owners and does not check service territories. It ignores any excluded resources, skips the territory search, and proceeds directly to step 4: the elimination of unavailable resources.

   - If there are no preferred resources, the application adds any excluded resources to the list of excluded resources and proceeds to the next step.

     Note: You can specify how you want the process to check Oracle Service Contracts or Oracle Install Base by setting the profile option JTFAM: Resource Search Order. The setting can affect the outcome by favoring either application. About Specifying Search Order for Contract and Install Base Resources, page 16-14.

3. Searches for qualified individuals using service territories.

   If neither the contracts nor the install base specified preferred resources, then the automatic assignment process checks to see if the service request attributes can be matched against any of the service territories set up with Oracle Territory Manager. If the service request can be assigned to a territory, then the individual resources listed in the territory become the potential owners.

   The process eliminates from the list of potential owners any excluded resources found in contracts and the install base and all the individuals that are not members of the group selected as the group owner.

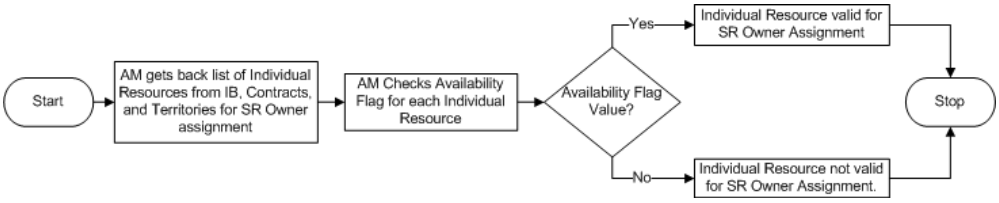
4. Checks the Web Availability indicator for an individual resource

   The Assignment Manager checks the Web Availability indicator for the individual resource. The Web Availability indicator is a quick mechanism for agents to make themselves available or unavailable for work assignment (service request or task). If the Web Availability indicator is set to "Yes," then the resource is considered for service request or task assignment. If this indicator is set to "No," the resource is filtered out from service request or task assignment.

   In Oracle TeleService, agents can specify their availability or unavailability by deselecting the Available check box in the Resource Availability window (From the Tools menu, select Web Availability).

In Customer Support, Service Desk and Case Management, agents indicate they are unavailable by clicking the Make Unavailable button in the Automatic Assignment region of the Dashboard page.

The following diagram illustrates request assignment to an individual resource.



5. Checks the resource's calendar to determine availability.

   The Assignment Manager checks the calendar of the resource to identify the availability of the individual resource based on the value of profile Service: Check Resource Calendar Availability for SR Auto Assignment. If this profile is set to Yes then the Assignment Manager checks the resources' availability before determining assignment, else the request is assigned to the first group found.

   The calendar indicates the working shifts and holidays for the resource. Resources who are unavailable at the time of request creation, that is, those who are on holiday or those that do not have an active shift at the time of request creation are eliminated from the request assignment process.

6. Picks the best resource using the load balancing formula.

   The formula calculates a score for each resource and selects the one with the highest score.

   The calculation balances the level of skill for a resource (the sum of skill levels for the product, platform, product category, and the problem code) with the backlog of service requests of different severities (Severity 1 through Severity 4) and the difference in time zones between the customer and the agent.

   You must assign weights for each of the factors in the formula for each service request type and severity using the Load Balancing Weights window. You can set up different weights for each service request type and service request severity. For details about the formula and how to set it up, see Setting Up the Load Balancing Formula, page 16-40.

Task Assignment

Unlike service requests that can have both a group and individual owners, tasks can have either an individual owner or a group owner.

You must decide which type of owner you wish to assign by setting the system profile: Service: Service Request Task Owner Auto Assignment Level.

- To distribute tasks to personal queues, set this system profile to Individual.
- For group, set it to Group.

The process for assigning tasks is similar to the two step process used to assign group ownership of service requests with a few minor differences.

The application:

1. Searches applicable service contracts and install base for group or individual preferred or excluded resources.
   - If the process finds an owner in this step, it terminates. If multiple preferred resources exist, the process assigns ownership to the first it finds.
   - If the process does not find an owner, it puts any excluded resources on the list of excluded resources.

     Note: You can specify how you want the process to check Oracle Service Contracts or Oracle Install Base by setting the profile option JTFAM: Resource Search Order. The setting can affect the outcome. About Specifying Search Order for Contract and Install Base Resources, page 16-14.

2. Searches for qualified resources using service territories.

   If neither contracts nor install base specify ownership, then automatic assignment searches for group or individual owners using the service territories set up with Oracle Territory Manager.

   To deliver tasks to individuals, you must assign an individual resource to each territory. For delivery to group queues, you must assign a group. The territories must be of the Service Request and Task usage.

   The application removes from the list of potential owners the resources in the exclusion list.

   If multiple groups or individuals qualify as potential owners, then the process assigns ownership to the first resource on the list. If no resource qualifies, then the user receives an error message.

   Note: If you are assigning tasks to individuals, then you can restrict the assignment to those individuals who are members of the group that has been assigned to work on the service request. This is accomplished by setting the system profile JTFAM: Filter Resources on Group Membership to Yes. A setting of No (the default) ignores the group owner of the parent service request.

3. Searches for qualified resources using calendars, shifts and exceptions

   Additionally, you can also use calendars, shifts, and exceptions to determine a resource's availability. If the profile Service: Check Resource Calendar Availability for Task Auto Assignment is set to Yes, then the Assignment Manager routes the tasks to a resource who is on an active shift and is not on holiday. If this profile is set to No, then the Assignment Manager routes the service request to the first resource found.

The process of assigning tasks to individuals does not use the work load balancing formula.

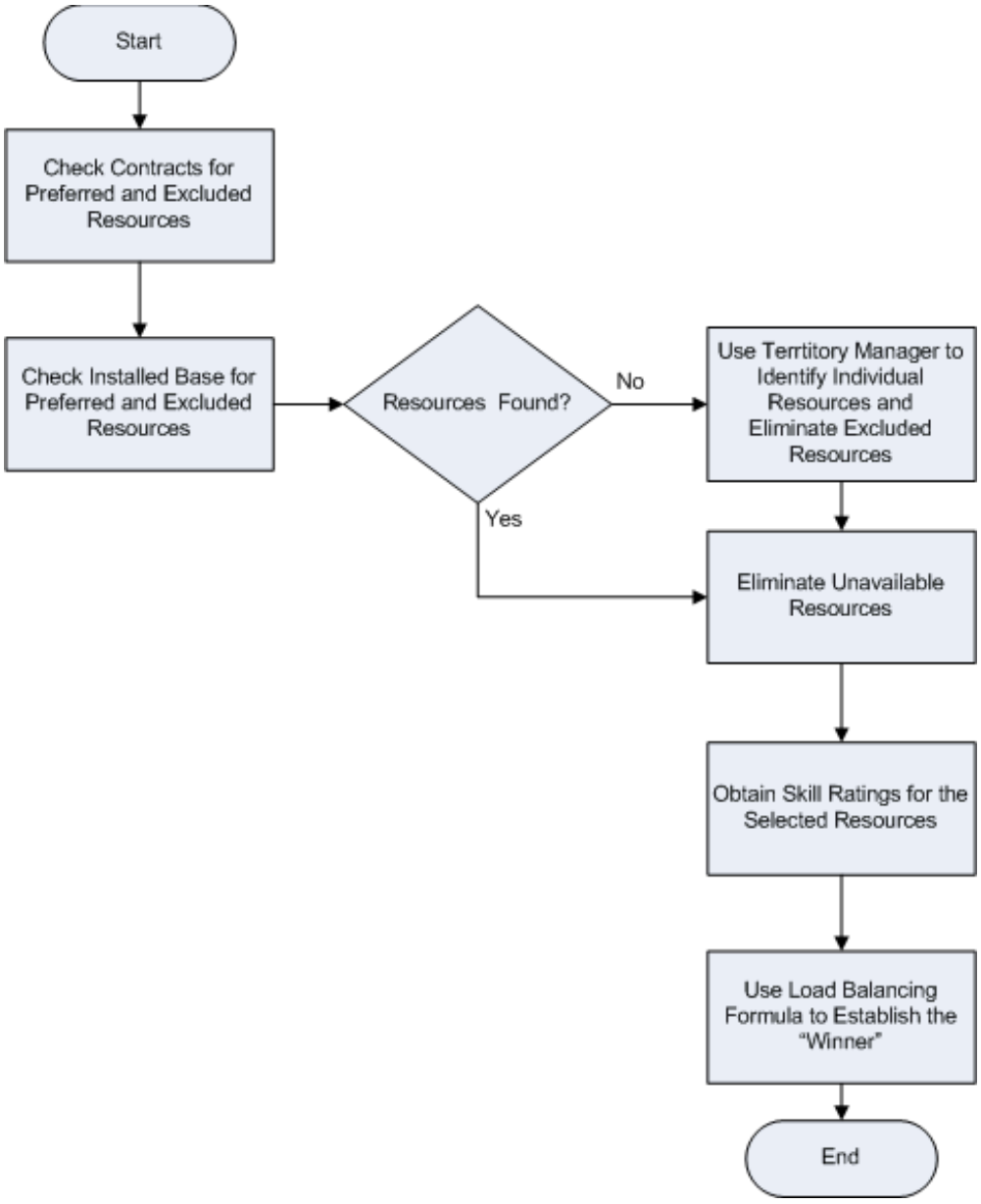
About Specifying Search Order for Contract and Install Base Resources

You can specify how the application searches for preferred and excluded resources in service contracts and the customer install base, by setting the system profile JTFAM: Resource Search Order. The setting can affect the outcome of the process by favoring one application over the other.

The effect of each of the available settings is described below:

- Both Contracts and Install Base (the default value)

  The application takes into account all preferred and excluded resources found in service contracts and install base as shown in the diagram below.

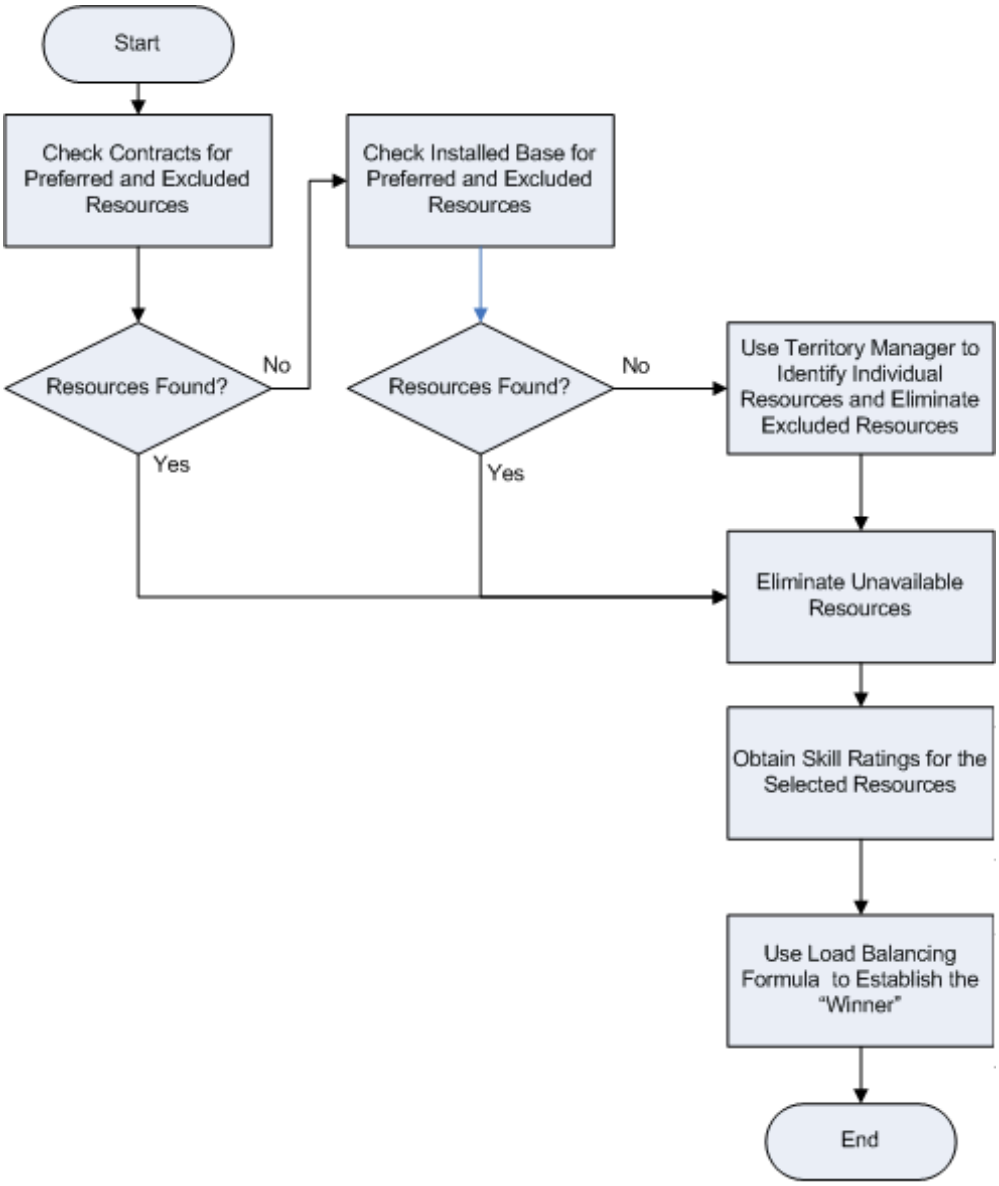


- Contracts Resource

  The application checks service contracts first. If the application finds preferred resources in service contracts, it does not check the install base for either preferred or excluded resources.

  If preferred resources are not found, then it searches the install base taking into account any excluded resources from service contracts.

  Here is the process with this setting:

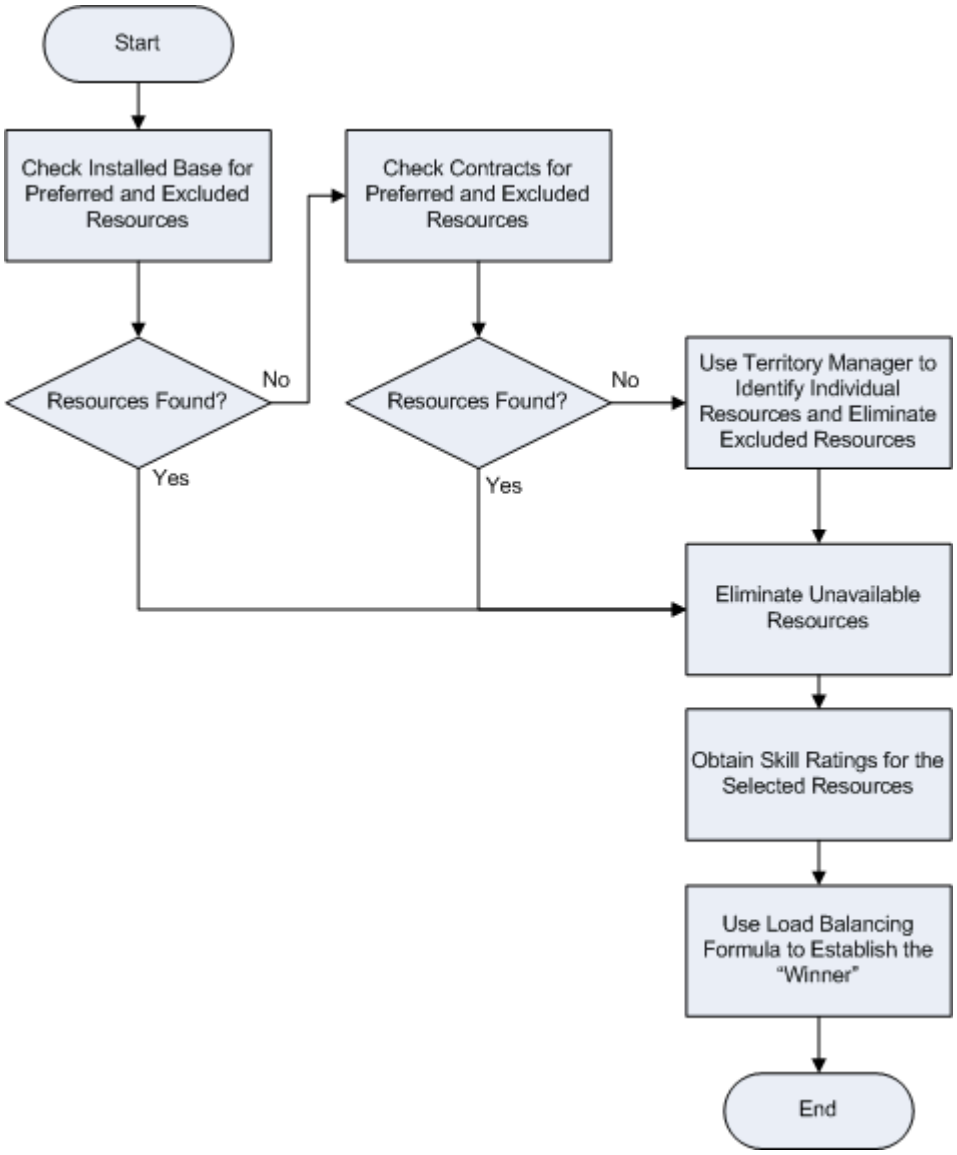


- Install Base Resource.

  The application checks the install base first. If the application finds preferred resources in the install base, it does not check service contracts for either preferred or excluded resources.

  If preferred resources are not found, then it searches service contracts taking into account any excluded resources from the install base.

  Here is the resulting process:



General Procedure for Setting Up Work Assignment

Use this general procedure as a guide for implementing work assignment. This procedure does not include steps for setting up manual assignment (by agents using the lists of values) as that is available by default without any setup.

To set up work assignment:

1. If you are only setting up assisted assignment for service requests or tasks (available only in Contact Center and Service Request), then the only required step is to set up are service territories. See Guidelines for Setting Up Service Territories,

page 16-27.

2. Set up automatic assignment of service requests according to the work distribution model you have selected:

   - To have agents choose work from the unassigned (or group) queues or use the Get Next Work button, set up assignment to group queues as outlined in Automatically Assigning Service Requests to Groups, page 16-22.

   - To have agents choose service requests from their personal work queues, set up assignment to personal queues as outlined in Automatically Assigning Service Requests to Individuals, page 16-24.

3. Set up service request task assignment appropriate for the distribution model you have chosen:

   - To have agents choose what tasks they want to work on from their unassigned (or group) queues (manual distribution from unassigned or group queue) or to use the Get Next Work button, follow the steps outlined in Automatically Assigning Service Request Tasks to Groups, page 16-25.

   - To have agents pick tasks to work on from their personal queues, follow the steps outlined in Automatically Assigning Service Request Tasks to Individuals, page 16-26.

4. Optionally, you can specify the order in which you want the application to check service contracts and the install base for preferred and excluded resources by setting the profile option JTFAM: Resource Search Order. By specifying the application to search first you can favor one over the other. For details, see About Specifying Search Order for Contract and Install Base Resources, page 16-14.

   The available settings are:

   - Both Contracts and Installed Base (the default value)

     The application takes into account all preferred and excluded resources found in service contracts and install base.

   - Contracts Resource

     The application checks service contracts first. If the application finds preferred resources in service contracts, it does not check the install base for either preferred or excluded resources.

     If no preferred resources are found, then it searches the install base taking into account any excluded resources from service contracts.

   - Installed Base Resource.

     The application checks the install base first. If the application finds preferred

resources in the install base, it does not check service contracts for either preferred or excluded resources.

If no preferred resources are found, then and only then it searches service contracts taking into account any excluded resources from the install base.

> **Note:** You can only change the order the application uses to check for resources. You cannot turn off the check. The application ignores the setting of Oracle Install Base system profiles Activate Installed Base Resources and Activate Installed Engineers.

5. Oracle Service Contracts can specify different resources for different business processes. For example, for field service, a contract may specify one group or individual to fix a particular piece of equipment and a different group to handle phone support.

   In this case, you may want to have the application restrict which resource is picked by the business process associated with each service request type.

   For service requests, this is done by setting Service: Use Business Process ID in Service Request Auto Assignment to Yes.

   - Yes: Limits the resources considered for automatic assignment to the resources associated with the business process for the service request type.
   - No: (The default setting) Makes all resources possible service request owners.

   For service request tasks this is done by setting the Service: Use Business Process ID in Service Request Task Auto Assignment profile option to Yes.

   - Yes: Limits the resources considered for automatic assignment to the resources associated with the business process for the service request type.
   - No: (The default setting) Makes all resources possible service request task owners.

6. Determine whether you want to enable real-time or batch-mode assignment for service requests by setting the system profile Service: Enable Real-Time Automatic Assignment of Agent-Created Service Requests. The setting determines assignment for all Oracle TeleService modules, including Customer Support and Service Desk, and Case Management.

   The available options are:

   - Yes

     Use this setting to trigger real-time assignment each time an agent takes one of

the triggering actions, for example, updates a service request or deletes the entries in the owner fields in an existing service request.

- No (the default setting)

  Use this setting to let the concurrent program Automatic Assignment of Resource for Service Request take care of the assignment instead. You must set up the concurrent program to run periodically.

  Also set this profile to No for manual or assisted assignment modes.

7. If you have implemented Oracle iSupport, then specify whether or not you wish to enable automated assignment each time a customer creates a service request on the web. This is accomplished by setting the system profile Service: Enable Real-Time Automatic Assignment of iSupport Service Requests.

   The available options are:

   - Yes

     Use this setting to implement automatic assignment each time a customer creates a service request in Oracle iSupport.

   - No (the default setting)

     Use this setting to let the concurrent program Automatic Assignment of Resource for Service Request take care of the assignment instead. You must set up the concurrent program to run periodically.

8. If you have chosen to assign service requests in the batch mode, then set up the concurrent program Automatic Assignment of Resource for Service Request to run periodically:

   - Do not enter any parameters to assign all service request types of all severities and all group owners.

   - You can restrict running the program by entering parameters for up to five service request types, severities, and group owners.

9. Optionally, you can set profiles that default service request and task owners. The defaults affect only service requests and tasks created by agents, not service requests created by customers on their web portal or tasks created automatically by the application. If you choose to default owners, agents must delete the defaulted entries for automatic assignment to take place.

   These profiles default owners for service requests:

   - Service: Default Group Owner for Service Request

     Specifies the default group owner.

If you use automatic assignment and default a group owner but not and individual one, then the application searches for valid owners only within that group when the agent saves the service request.

- Service: Default Service Request Owner Type

  Specifies the owner type for owners in the list of values in Service: Service Request Owner. Valid values are all of the types of resources in the resource manager:

  - Employee Resource (the default)
  - Other Resource
  - Partner Resource
  - Party Resource
  - Supplier Contact
  - To Be Hired

- Service: Default Service Request Owner

  Specifies the default service request owner. The list of values includes all of the resources of the type specified in the previous profile. Usually this profile is set at the individual agent level.

These system profiles default owners for service request tasks in the Service Request window (Oracle Forms) and the Task Template page in HTML modules (including Customer Support and Case Management):

- Service: Default Service Request Task Owner Type

  Specifies the default group owner type for "Service: Default Service Request Task Owner." The possible values are:

  - Employee Resource (the default)
  - Group Resource
  - Supplier Contact
  - Team Resource

- Service: Default Service Request Task Owner

  Specifies the default service request task owner. The list of values includes all of the resources of the type specified in the previous profile.

Optionally, if you are using the Service Request window you can also default the task assignee. (These system profiles are not used by the HTML service applications):

- Service: Default Task Assignee Type on the Service Request Tab

  Specifies the type of assignee available in the list of values for Service: Default Task Assignee on the Service Request Tab.

- Service: Default Task Assignee on the Service Request Tab

  Defaults the assignee.

10. You are now ready to set up work distribution. See General Procedure for Setting Up Work Distribution, page 16-42.

Automatically Assigning Service Requests to Groups

Use this procedure to set up assignment of service requests to groups as part of the setup outlined in the General Procedure for Setting Up Work Assignment, page 16-17.

To set up service request assignment to groups:

1. Set the system profile Service: Service Request Owner Auto Assignment Level to Group.

2. Set up service territories following the procedures described in *Oracle Territory Manager User Guide* and the guidelines listed in Guidelines for Setting Up Service Territories, page 16-27.

   Set up service territories with the Service Request territory usage. Each territory must have a group resource.

3. Checks the resource's calendar to determine availability.

   Additionally, you can also use calendars, shifts, and exceptions to determine a resource's availability. If the profile Service: Check Resource Calendar Availability for SR Auto Assignment is set to Yes, then the Assignment Manager routes the service requests to a group who is on an active shift and is not on holiday. If this profile is set to No, then the Assignment Manager routes the service request to the first group.

   If the above profile option is set to Yes, the Assignment Manager determines if group is on an active shift based on the following time related attributes:

   - Time zone associated with the group

   - Calendars associated with the group

- Shift to define the availability time for a group (Assignment Manager interprets the shift times in the time zone associated to the group)

- Exceptions to define the unavailability or holiday time for the group (Assignment Manager interprets the exception day/date/times in the time zone associated to the group)

Associate Time Zone with the Group

Each resolving group can be set up to work within a specific time zone. If a group does not have a defined time zone, the server time zone is considered as the time zone of the group. When a service request is created, the Assignment Manager checks the time zone of the group to evaluate if the resolving group has an active shift. If the group has an active shift at the time of request creation it qualifies as a potential resource for request assignment. For more information, see Setting Up Resource Groups, page 6-2.

Associate Calendars with the Group

You can optionally define a calendar for the group in Oracle Common Applications Calendar to specify the working days (shifts) and holidays (exceptions) for the group. If, at the time of request creation, the group is on a holiday or does not have an active shift, or does not have a calendar defined, then it is filtered out from the list of potential candidates for request assignment.

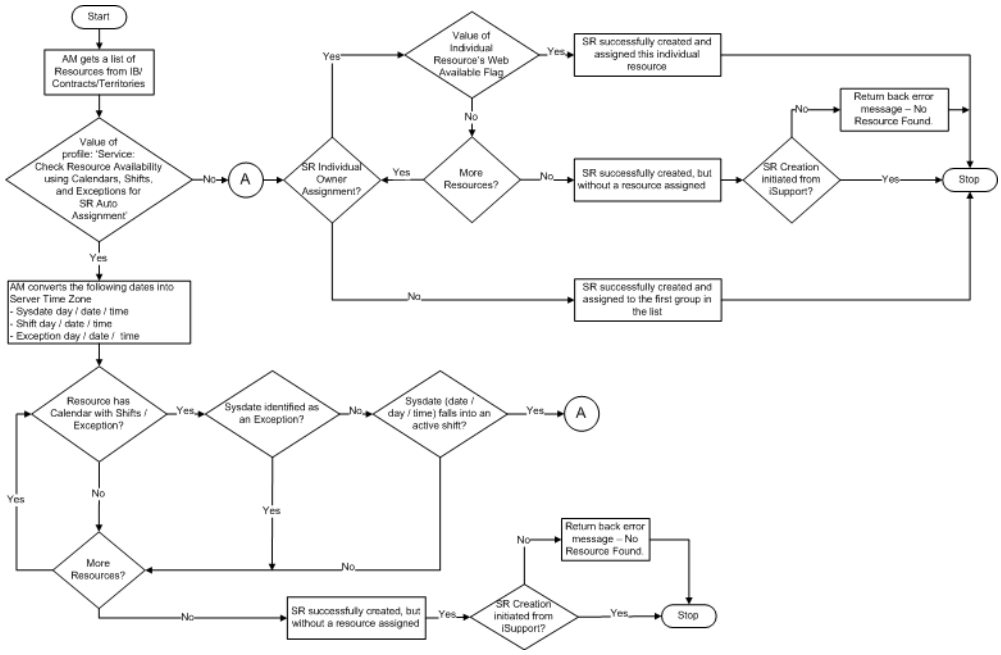
Define Shifts for the Group

Shifts are defined in Oracle Common Applications Calendar and assigned to a resource's calendar. A shift defines the day-to-day schedule for the resource. It specifies the availability or unavailability of a resource during a specific time. For example, if a group's business hours are 9am – 5pm PST Monday through Friday, it means that the group can be assigned requests that originate between 9am – 5pm PST irrespective of the time zone where the request was logged.

Define Exceptions for the Group

Exceptions are days when the resource is on a holiday and is not available. For example, 4th July is a holiday in the US. Hence groups for which 4th July is defined as a holiday are not considered for request assignment for service requests created on the 4th of July.

The following diagram illustrates the automatic assignment of service requests to group and individual resources.



For more information on calendars, shifts, and exceptions, see *Oracle Common Applications Calendar User Guide*

Automatically Assigning Service Requests to Individuals

Use this procedure to set up assignment of service requests to individuals as part of the setup outlined in the General Procedure for Setting Up Work Assignment, page 16-17.

To set up automatic service request assignment to individuals:

1. Set the system profile Service: Service Request Owner Auto Assignment Level to Individual.

2. Set the Service: Check Resource Calendar Availability for SR Auto Assignment profile option to Yes for the Assignment Manager to check the availability of resource using calendars, shifts, and exceptions. If this profile is set to Yes and the resource does not have a calendar, then the resource is not considered for assignment. If the calendar check is not required, set this profile to No.

3. Set up service territories following the procedures described in *Oracle CRM Application Foundation User Guide* and *Oracle Territory Manager User Guide* and the guidelines listed in Guidelines for Setting Up Service Territories, page 16-27.

   You must use the Service Request territory usage to set up your territories and each low-level territory must have both a group and all of the assignees in that group.

4. Set up the numerical values you want to use for each skill level as this influences

work assignment. See Specifying the Numerical Equivalents for Skill Levels, page 16-41.

5. Navigate to Setup, Service Requests, Load Balancing Weights and set up the formula the application uses to optimize assignment according to the procedure described in Setting Up the Load Balancing Formula, page 16-40.

6. To take advantage of skills based assignment and autobalancing process, you must rate the resources in the Resource Manager on the following skills:

   - Product Category
   - Product
   - Problem Code
   - Platform

   For details see the "Managing Your Resources" chapter of the *Oracle Trading Community Architecture User Guide*.

Automatically Assigning Service Request Tasks to Groups

Use this procedure to set up assignment of service request tasks to groups as part of the setup outlined in the General Procedure for Setting Up Work Assignment, page 16-17.

To set up automatic service request task assignment to groups:

1. Set the following system profiles:

   - Service: Service Request Task Owner Field Optional to Yes. A setting of No requires the agent to manually enter the owner before saving the task and does not permit automatic assignment.
   - Service: Service Request Task Owner Auto Assignment Level to Group. Tasks have only one owner which can be either a group or an individual.
   - Service: Check Resource Calendar Availability for Task Auto Assignment. Set the profile value to Yes to use calendars, shifts, and exceptions associated with the resources for task routing. If this profile is set to Yes and the group does not have a calendar, then the resource is not considered for assignment. If the calendar check is not required, set this profile to No.

2. Set up service territories following the procedures described in *Oracle CRM Application Foundation User Guide* and *Oracle Territory Manager User Guide* and the guidelines listed inGuidelines for Setting Up Service Territories, page 16-27.

Set up service territories with the Service Request and Task territory usage. Each territory must have a group resource.

3. Checks the Groups' calendar to determine availability

   Additionally, you can also use calendars, shifts, and exceptions to determine a group's availability for automatically assigning tasks. If the profile Service: Check Resource Calendar Availability for Task Auto Assignment is set to Yes, then the Assignment Manager routes the task to a group who is on an active shift and is not on holiday.

   Using this method tasks are automatically assigned to a group based on their availability. The availability is evaluated based on the following time attributes.

   - Time zone associated with the group
   - Calendars associated with the group
   - Shift to define the availability time for a group (Assignment Manager interprets these shift times in the time zone associated to the group)
   - Exceptions to define the unavailability or holiday time for the group (Assignment Manager interprets the exception day / date / times in the time zone associated to the group)

   For more information, see Automatically Assigning Service Requests to Groups, page 16-22.

Automatically Assigning Service Request Tasks to Individuals

Use this procedure to set up assignment of service request tasks to individuals as part of the setup outlined in the General Procedure for Setting Up Work Assignment, page 16-17.

To set up service request task assignment to individuals:

1. Set the following system profiles:
   - Service: Service Request Task Owner Field Optional. Choose one of the following values:
     - Yes: Makes entry of an owner by the agent optional and lets the application make the assignment. This is the most common setting.
     - No: Requires the agent to make the entry. The agent enters the group owner and the application then automatically assigns the individual owner.
   - Service: Service Request Task Owner Auto Assignment Level to Individual.

Tasks have only one owner which can be either a group or an individual.

- Service: Check Resource Calendar Availability for Task Auto Assignment to Yes, to check calendars, shifts, and exceptions associated with the list of resources. If this profile is set to Yes and the resource does not have a calendar, then the resource is not considered for assignment. If the calendar check is not required, set this profile to No.

2. You can restrict assignment to those individuals who are members of the group that has been assigned to work on the service request. This is accomplished by setting the system profile JTFAM: Filter Resources on Group Membership to Yes. A setting of No (the default value) ignores the group owner of the parent service request.

3. Set up service territories following the procedures described in *Oracle Territory Manager User Guide* and the guidelines listed inGuidelines for Setting Up Service Territories, page 16-27.

   Set up service territories with the Service Request and Task territory usage. Each territory must specify an individual resource.

4. Check the resource's calendar to determine availability.

   If the Service: Check Resource Calendar Availability for Task Auto Assignment profile option is set to Yes, the Assignment Manager checks the availability of resource using calendars, shifts, and exceptions. If the resource's calendar shows that the resource is on an active shift then this resource is assigned the task. If this profile is set to No, then the Assignment Manager routes the service request to the first resource found

Guidelines for Setting Up Service Territories

Use the information below as a guideline for setting up service territories according to the procedures described in *Oracle Territory Manager User Guide*.

You can set up a single territory hierarchy to manage both service request and task assignments. However, large implementations should consider setting up multiple smaller hierarchies to improve performance. You may consider setting up separate service territory hierarchies for assigning tasks and service requests, for example.

> **Note:** If you do not set up territories and the work distribution process does not find any resources in contracts or the install base, the user receives an error message.

When setting up territories for assigning service requests, you must select "Service Request" as the Usage.

For task territories, you must select "Service Request and Task" as the Transaction Type.

The following table lists the matching attributes for both service requests and tasks in the order they appear in the list of values and explains their source.

You cannot use some of the attributes as indicated below.

Territory Assignment Matching Attribute	Available for Use	U.I. Source / Comments
Component /Subcomponent	Yes	With this matching attribute you can specify the component, and the subcomponent of an item in inventory.
Account Code	No	Reserved for future use.
Area Code	Yes	Area code for a customer's phone number from the Phone field in the Customer region of the Service Request window.
City	Yes	City of incident address entered in the Service Request header.
Contact Preference	Yes	Customer contact preference entered in the Communication Preference field in the Service Request window.
Country	Yes	Country of incident address.
County	Yes	County of incident address. This matching attribute is available for validated addresses only. Validated addresses are addresses the agent enters into a service request or task from a list of values rather than entered as text.

Territory Assignment Matching Attribute	Available for Use	U.I. Source / Comments
Customer Name	Yes	Customer name entered in the Name field in the Customer region of the Service Request window.
Customer Name Range	Yes	Alphabetical name range for customer name.
Customer Site	No	Reserved for future use.
Group Owner	Yes	Group Owner field in the Service Request window.
Inventory Item	No	Do not use. Instead, use the Product qualifier for inventory items.
Number of Employees	Yes	Number of customer employees.
Platform	Yes	Platform field on the Subject tab of the Service Request window.
Postal Code	Yes	Postal Code field of incident address.
Problem Code	Yes	Problem Code field on the Workbench tab of the Service Request window.
Product	Yes	Oracle Inventory item entered in the Item field of a Service Request.

Territory Assignment Matching Attribute	Available for Use	U.I. Source / Comments
Product / Component /Subcomponent	Yes	With this matching attribute you can specify the product, the component, and the subcomponent of an item in inventory (as described in that item's Bills of Material (BOM)). To assign on item only, use the Product matching attribute instead.
Product Category/Product	Yes	This matching attribute permits you to assign based on an Oracle Inventory item category (Product Category) alone or in combination with one of its items (Product). If you are assigning based on the inventory item alone, then use the Product matching attribute instead.
Province	Yes	Province of incident address.
Request Creation Channel	Yes	Channel field on the header of the Service Request Window.
Request Severity	Yes	Severity field on the header of the Service Request Window.
Request Status	Yes	Status field on the header of the Service Request Window.
Request Type	Yes	Type field on the header of the Service Request Window.
Request Urgency	Yes	Urgency field on the Workbench tab of the Service Request window.

Territory Assignment Matching Attribute	Available for Use	U.I. Source / Comments
Service Contract Coverage	Yes	Coverage field on the header of the Service Request Window.
Service Item	Yes	The Service field on the header of the Service Request window
Service Request Language	Yes	Language field in the header.
State	Yes	State field of incident address.
Subcomponent	Yes	With this matching attribute you can specify the subcomponent of an item in inventory.
VIP Customers	No	Reserved for future use.

The following table lists three additional matching attributes that are available for tasks only:

Territory Assignment Matching Attribute	Available for Use	U.I. Source / Comments
Support Site	Yes	The support site where the owner of the service request is located. Each support resource can be linked to a support site in the Resource Manager. The support site displays in the Service Request window header (Oracle Forms).
Task Type	Yes	Task Type field.
Task Status	Yes	Task Status field.
Task Priority	Yes	Task Priority field.

For more information on geographic and nongeographic qualifers, refer Service Qualifiers, page E-1.

Although the Territory Management program makes it possible for you to assign resources by product knowledge using product-related matching attributes such as product or problem code, Oracle recommends that you instead set up territories based on geography, or such factors as urgency and the service level set in SLAs. This is because the automatic assignment process takes resource skills into consideration later during load balancing.

> **Note:** To assign service requests to individuals, you must enter the individual resource group members in addition to the resource groups into each service territory. This means that as resources change over time, you must maintain accurate resource lists in two places: in the resource groups and in the territories.

Guidelines for Setting Up Calendars, Shifts, and Exceptions

Use this procedure to set up calendars, shifts, and define exceptions for resources as part of the setup outlined in the General Procedure for Setting Up Work Assignment, page 16-17.

You can optionally set up resources to work in a specific time zone. Time zones are setup in the Resource Manager while creating or updating group and individual resources. The Assignment Manager uses the time zone attribute to determine the availability or unavailability of a resource. For example, if group A is setup to work in the PST time zone, then the Assignment Manager interprets the shift pattern associated with group A to be in the PST time zone.

The following section describes an example of how organizations can setup the availability and unavailability times for resources for efficient service request and task auto assignment.

To set up time zones

Define resolving groups and setup the time zone for the resolving groups. You can define groups that work during the weekdays from 9am – 5pm, Monday to Friday, on weekends from 00am – 23.59pm, Saturday to Sunday, and on holidays

For example, if organization ABC is located in three geographic time zones – the USA, the UK, and Australia, then you can setup the resolving groups as given below:

Resolving Group	Time Zone	Time Gap with GMT (in hrs)
US Resolving Group	Pacific Standard Time – PST	- 8

US Resolving Group for Weekends	Pacific Standard Time – PST	- 8
US Resolving Group for Holidays	Pacific Standard Time – PST	- 8
UK Resolving Group	Greenwich Mean Time – GMT	0
UK Resolving Group for Weekends	Greenwich Mean Time – GMT	0
UK Resolving Group for Holidays	Greenwich Mean Time – GMT	0
Australia Resolving Group	Australian Western Standard Time – AWST	+ 8
Australia Resolving Group fro Weekends	Australian Western Standard Time – AWST	+ 8
Australia Resolving Group for Holidays	Australian Western Standard Time – AWST	+ 8

In the above example, when the Australian resolving group finishes its normal working hours, from 9am – 5pm AWST, the UK resolving group starts its normal working hours, which are from 9am – 5pm GMT, and when the UK group finishes its normal working hours, the US resolving group takes over reassigned or fresh issues. For more information, see Setting Up Resource Groups, page 6-2

To set up Calendars and Shifts

Calendars associated with a resource indicate the days when a resource is working and is available, and the days when the resource is on holiday. If a resource does not have a calendar associated with it, the Assignment Manager filters it out during the service request or task assignment.

A shift is assigned to a calendar, and shows the active working hours of a resource on a working day; it tells you whether the group is available for service request assignment at the time when the request is created. You can optionally set up shifts and assign these to resources' calendars. A shift may differ from group to group.

For each of the above resolving groups, a shift can be defined for normal working hours and a shift exclusively for groups that work on weekends.

1. Define the shift for the groups that work on a weekday as follows:

Begin	Duration			End	
Weekday	**Time**	**Hours**	**Minutes**	**Weekday**	**Time**
Monday	09.00	8	00	Monday	17.00
Tuesday	09.00	8	00	Tuesday	17.00
Wednesday	09.00	8	00	Wednesday	17.00
Thursday	09.00	8	00	Thursday	17.00
Friday	09.00	8	00	Friday	17.00

2. Define the shift for the group that works on a weekend as follows:

Begin	Duration			End	
Weekday	**Time**	**Hours**	**Minutes**	**Weekday**	**Time**
Saturday	00:00	23	59	Saturday	23:59
Sunday	00:00	23	590	Sunday	23:59

3. Assign the shifts to the respective calendars for groups that work during weekdays and groups that work on weekends.

   The Assignment Manager interprets the working shifts of the resolving group to determine their availability as follows:

   The 'US Resolving Group' and the 'US Resolving Group for Holidays' are available from 9am – 5pm PST, Monday to Friday and the 'US Resolving Group for Weekends' is available from 00am –11.59 pm PST, Saturday to Sunday.

   The 'UK Resolving Group' and the 'UK Resolving Group for Holidays' are available from 9am – 5pm GMT, Monday to Friday and the 'UK Resolving Group for Weekends' is available from 00am –11.59 pm GMT, Saturday to Sunday.

   The 'Australian Resolving Group' and the 'Australian Resolving Group for Holidays' are available from 9am – 5pm AWST, Monday to Friday and the 'Australian Resolving Group for Weekends' is available from 00am –11.59 pm AWST, Saturday to Sunday.

If a service request or task is created for example, on Wednesday, 07-OCT-2009 10:00 GMT, assuming that the server time is GMT the assignment process would be as follows:

The 'US Resolving Group for Weekends', 'UK Resolving Group for Weekends', and 'Australian Resolving Group for Weekends' groups are filtered out, as 07-OCT-09 falls on a Wednesday, a weekday. The 'US Resolving Group for Holidays', 'UK Resolving Group for Holidays', and 'Australia Resolving Group for Holidays' groups are eliminated as they are on holiday on Saturday, 07-OCT-09 10:00 am GMT. Hence, the 'US Resolving Group', 'UK Resolving Group', and the 'Australia Resolving Group' qualify for service request assignment.

The Assignment Manager determines the availability of the US, UK, and Australia resolving groups based on time the request is created, which is 10:00 am GMT.

Availability of the US Resolving Group

The shift of the 'US Resolving Group' when converted to the server time zone is Wednesday 5pm – Thursday 01 am GMT. Since the service request creation time, which is 10:00 am GMT, is out of the active shift of the 'US Resolving Group', the service request is not assigned to the 'US Resolving Group'.

The Assignment Manager checks for the availability of the remaining groups.

Availability of the UK Resolving Group

The shift of the 'UK Resolving Group' when converted to the server time zone is Wednesday 9 am – 5 pm GMT. Since the service request creation time, which is 10:00 am GMT, is within the active shift of the 'UK Resolving Group', the service request is assigned to the 'UK Resolving Group'.

If there is more than one resource that qualifies for service request routing, the Assignment Manager assigns it to the group with the least workload, if load-balancing rules are setup. If load-balancing rules are not setup, the request is assigned to the first qualifying group.

Similarly, if the service request is logged on a day that falls on a Saturday or Sunday, the Assignment Manager filters out the resolving groups that work on holidays and during the weekdays Monday to Friday. In this case the qualifying groups are the 'US Resolving Group for Weekends', 'UK Resolving Group for Weekends', and 'Australia Resolving Group for Weekends'

For a service request that is created on 17-OCT-09, 6am GMT, the assignment process is as follows:

Check Availability of the US Resolving Group for Weekends

The shift of the 'US Resolving Group for Weekends' when converted to the server time zone is Saturday 8 am to Sunday 7.59 am GMT. The 'US Resolving Group for Weekends' is not available at the time of request creation, which is Saturday 6 am GMT. Hence this group is not considered for request routing.

The Assignment Manager checks the availability of the other groups.

Check Availability of the UK Resolving Group for Weekends

The shift of the 'UK Resolving Group for Weekends' when converted to the server time zone is Saturday 00:00 am to 11.59 pm GMT. Since at the time of request logging, which is Saturday 6 am GMT, this group is available, the service request is assigned to the 'UK Resolving Group for Weekends.'

To set up Exceptions

Exceptions are corporate holidays or personal time off given to a resource. You can optionally set up exceptions after you define a shift for the group. Holidays differ in different time zones. For example, July 4th is a holiday in the US, while for groups in UK and Australia it is a working day. Similarly, in Australia, Jan 26th is a holiday while it is a holiday for groups in the US and the UK. When the Assignment Manager checks for availability of a resource, it eliminates resources that are on holiday at the time of service request assignment.

Organizations deploy groups that work exclusively on holidays. These groups have similar shifts as groups that work the 9am – 5pm shift, Monday to Friday. The remaining days are marked as holidays for these groups.

Resolving Group	**Exceptions**		
	Name	**Effective From**	**Effective To**
US Resolving Group	Independence Day	04-JUL-2009 00:00:00	04-JUL-2009 23:59:59
US Resolving Group for Weekends	Christmas Day	25-DEC-2009 00:00:00	25-DEC-2009 23:59:59
UK Resolving Group	First Monday in May	05-May-2009 00:00:00	05-MAY-2009 23:59:59
UK Resolving Group for Weekends	Christmas Day	25-DEC-2009 00:00:00	25-DEC-2009 23:59:59
Australia Resolving Group	Australia Day	26-JAN-2009 00:00:00	26-JAN-2009 23:59:59
Australia Resolving Group for Weekends	Christmas Day	25-DEC-2009 00:00:00	25-DEC-2009 23:59:59
US Resolving Group for Holidays	US Days Off – 1	01-JAN-2009 00:00:00	03-JUL-2009 23:59:59
	US Days Off – 2	05-JUL-2009 00:00:00	24-DEC-2009 23:59:59
	US Days Off – 3	26-DEC-2009 00:00:00	31-DEC-2009 23:59:59

UK Resolving Group for Holidays	UK Days Off – 1	01-JAN-2009 00:00:00	04-MAY-2009 23:59:59
	UK Days Off – 2	06-MAY-2009 00:00:00	24-DEC-2009 23:59:59
	UK Days Off – 3	26-DEC-2009 00:00:00	31-DEC-2009 23:59:59
Australia Resolving Group for Holidays	AUS Days Off – 1	01-JAN-2009 00:00:00 25-JAN-2009 23:59:59	25-JAN-2009 23:59:59
	AUS Days Off – 2	27-JAN-2009 00:00:00	24-DEC-2009 23:59:59
	AUS Days Off – 3	26-DEC-2009 00:00:00	31-DEC-2009 23:59:59

The Assignment Manager interprets the working shifts of the resolving group to determine their availability as follows:

The 'US Resolving Group' and the 'US Resolving Group for Weekends' are not available on 4th July from 00 am to 11.59 pm and on 25th December from 00 am to 11.59 pm. The 'US Resolving Group for Holidays' is available only on the above two days.

The 'UK Resolving Group' and the 'UK Resolving Group for Weekends' are not available on 5th May from 00 am to 11.59 pm and on 25th December from 00 am to 11.59 pm. The 'UK Resolving Group for Holidays' is available only on the above two days.

The 'Australian Resolving Group' and the 'Australian Resolving Group for Weekends' are not available on 26th January from 00 am to 11.59 pm and on 25th December from 00 am to 11.59 pm. The 'Australian Resolving Group for Holidays' is available only on the above two days.

If a service request or task is created for example, on Friday 25-DEC-2009 10:00 GMT, assuming that the server time is GMT; the assignment process is as follows:

The 'US Resolving Group', 'UK Resolving Group', 'Australia Resolving Group', 'US Resolving Group for Weekends', 'UK Resolving Group for Weekends', and 'Australia Resolving Group for Weekends' groups are filtered out as they are on holiday on Friday 25-Dec-2009.

The Assignment Manager checks the availability of the other groups to assign the service request.

Check Availability of the US Resolving Group for Holidays

The shift of the 'US Resolving Group for Holidays' when converted to the server time is 25th Dec 2009 from 1.00 am to 9.00 am GMT. As the request logging time is after the active shift of the 'US Resolving Group for Holidays,' the group is eliminated from service request routing.

Check Availability of the UK Resolving Group for Holidays

The shift of the 'UK Resolving Group for Holidays' when converted to the server time is 25th Dec 2009 from 9.00 am to 5 pm GMT. Since the request creation time is within the active working hours of the group, the service request is assigned to the 'UK Resolving Group for Holidays.'

If there is more than one resource that qualifies for service request or task assignment, the Assignment Manager assigns the service request to the first group. If load-balancing rules are defined, then the service request is assigned to the group with the least load.

About the Load Balancing Formula

The load balancing formula calculates the score for each resource as a sum of the factors multiplied by the weights you enter in this window. The resource with the highest score becomes the owner. Here is the formula:

```
Score for Each Potential Owner = Category Skill(weight 1) +
Product Skill(weight 2) + Platform Skill (weight 3) + Problem
Code Skill(weight 4) + Time Since Last Assignment(weight 5) +
Severity One Count(weight 6) + Severity Two Count(weight 7) +
Severity Three Count (weight 8) + Severity Four Count (weight 9)
+ Time Zone Difference (weight 10)
```

The table below explains each factor:

No.	Factor Name	Description
1	Category Skill	Product category skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.
2	Product Skill	Product skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.
3	Platform Skill	Product platform skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.
4	Problem Code Skill	Product code skill level of the resource entered in the Resource Manager. The formula uses the numeric value assigned to the proficiency level the employee.
5	Time Since Last Assignment	The time in minutes since the agent received the last service request assignment.

No.	Factor Name	Description
6	Severity One Count	The service requests back log of the highest severities. These include all of the severities that you have set with importance = 1. See Setting Up Service Request Severities, page 7-19.
7	Severity Two Count	The service requests back log of high severities. These include all of the severities that you have set with importance = 2.
8	Severity Three Count	The service requests back log of medium severities. These include all of the severities that you have set with importance = 3.
9	Severity Four Count	The service requests back log of low severities. These include all of the severities that you have set with importance = 4.
10	Time Zone Difference	This factor is calculated based on Oracle Support organization's best practices. It is based on the difference between the agent and customer contact time zones. The Time Zone Difference = [Round (2.77 - Absolute Value (contact time zone - support site time zone in hours/4)]. The agent time zone is the time zone you enter when maintaining resources on the Service tab of the Resource window. (See Setting Up Resources, page 6-5.)

Guidelines for entries:

- Enter positive weights for the skill levels (factors 1 through 4).
- Use a weight factor in the negative hundreds to make sure the factor is not lost in rounding. For example, a negative factor of -500 works as a weight factor for Time Since Last Assignment; a negative one (-1) will not.
- There is no restriction on the numerical value of the weights.
- To remove a particular factor from the formula, assign it a weight of 0.
- You can use as many or as few factors as you need. You can set up an even distribution of service requests among individuals with just one factor, for example: Time Since Last Assignment.

  Assigning a weight balancing factor of -1000 just to this one factor and leaving all the other weights as 0, causes the application to distribute service requests evenly in a round-robin fashion.

Setting Up the Load Balancing Formula

The load balancing formula picks the optimal individual service request owner from those individuals in the owning group that have not been excluded (either because they are not available or are listed as excluded in the install base or service contracts).

The formula picks the optimal individual based on the level of skill for a resource (the sum of skill levels for the product, platform, product category, and the problem code). It takes into account the back log of service requests of different severities and the difference in time zones between the customer and the agent.

Use this procedure to customize the formula by setting up the weights for each factor. The weights determine how much importance each factor is given in the calculation.

> **Note:** Case Management does not use skills by product or product category.

You must set up separate weights for each service request type and severity combination.

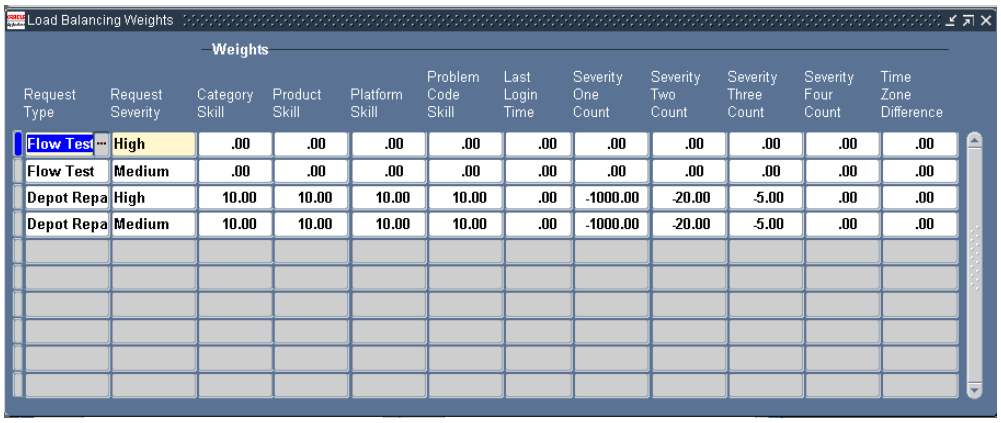
Prerequisites:

You must set up the numerical values you want to use for each skill level as this influences assignment. See Specifying the Numerical Equivalents for Skill Levels, page 16-41.

To set up the load balancing formula:

1. Under the Service responsibility, navigate to Setup: Resource Management, and select Load Balancing Weights**.**

   The Load Balancing Weights window appears.



2. For each service request type and severity combination enter the weights to be used by the formula:

    1. Enter the service request type and severity you wish to set up using the LOVs.

    2. Enter the formula weights according to the guidelines specified in About the Load Balancing Formula, page 16-38.

Specifying the Numerical Equivalents for Skill Levels

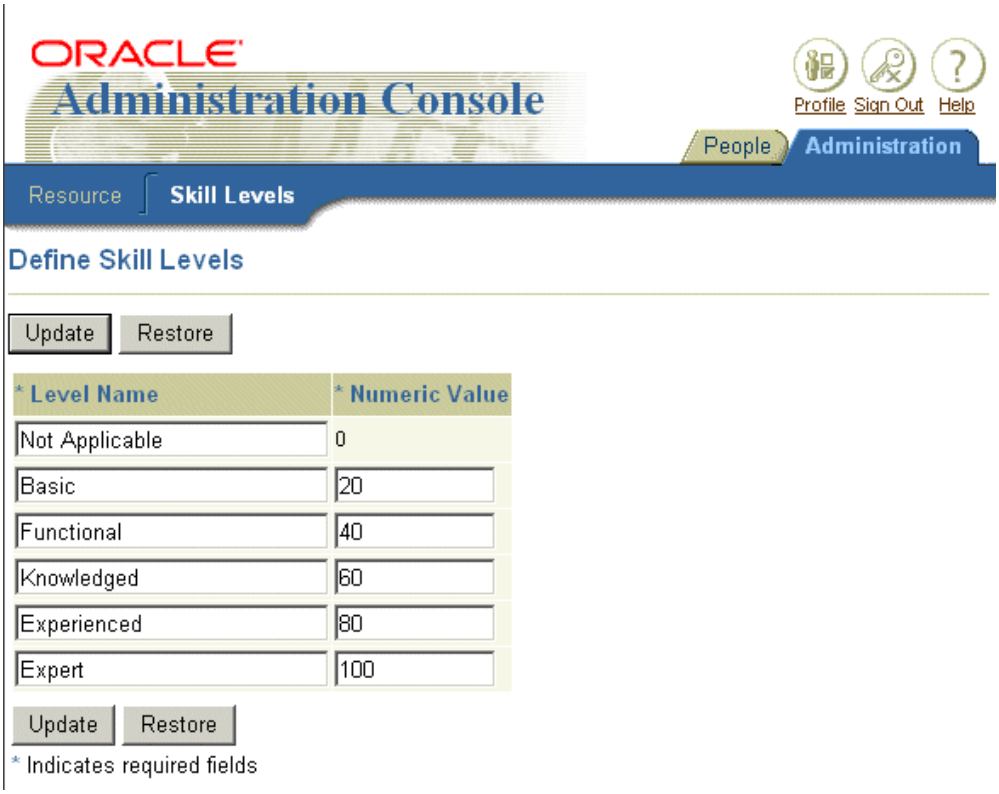
Use this procedure to specify a numerical value for each of the six default skill levels. The numerical skill level is one of the factors used by the workload balancing formula to calculate the optimal resource to assign as the service request owner. This means that you must enter the smallest number to the Basic Skill level and the highest number to Expert. The formula assigns ownership to the resource with the highest skill level. The higher the number you enter, the more important the skill is as a factor in the formula.

To specify the numerical equivalents for skill levels:

1. Log in to HTML applications under the Resource Self Service Administrator responsibility.

2. Select the Administration tab and then the Skill Levels subtab.

    The Define Skill Levels page appears.



3. You can modify the wording for the skill level.
4. Enter a numeric value for each skill level.
5. Click **Update**.

General Procedure for Setting Up Work Distribution

Use this general procedure as a guide for implementing work distribution.

To set up work distribution:

1. If you are setting up automated distribution of service requests via the Get Next Work (or Next Work) button, then:
    1. Under the Service responsibility, navigate to Setup, then Definitions, and then select Request Severities. Ensure that each service request severity has been classified with a priority. This is a required step.

        The Universal Work Queue uses the priority setting to calculate service request priority in agents' queues and for delivery when the agent clicks Next Work or Get Next Work. See How the Application Decides Work Priority, page 16-5.

2. Set "IEU:Distribute: Mode:" to **Distribute and Deliver or All Modes.** Both settings enable the distribution**All Modes** also makes it possible to use the Request Work button available Oracle-Forms-based Universal Work Queue window**.**

3. To distribute service request tasks via the button, set "IEU: Distribute: Service Request Task: Work Source" to "Yes."

4. To distribute service requests, set "IEU: Distribute: Service Request: Work Source" to "Yes".

   Note: If agents are using the Universal Work Queue window to manage their work, then you can set up additional variations to the assignment models. You can:

   - Make it possible for agents to specify whether the Next Work button assigns Service Requests, Tasks, or both.
   - Enable the Request Work button which assigns a specific number of unassigned work items to agent's personal queues.

   See the *Oracle Universal Work Queue Implementation Guide*.

5. The e most urgent work item is distributed first. This can be true even when the agent cannot work that service request, for example, while waiting for approvals or electronic signatures. An agent can have the work distribution process ignore the service request by setting its status to a status that has been designated as on hold. You can set up on-hold statuses in the Service Request Status window. See Setting Up Service Request Statuses, page 7-8.

2. Turn work distribution on by following the procedure described in Turning On Work Distribution and Synchronizing Work Data, page 10-10.

Turning On Work Distribution and Synchronizing Work Data

You must complete this procedure to turn on work distribution after implementation or in case a synchronization error occurs.

The application stores key information it needs for distributing work, such as priorities and due dates, in a separate Universal Work Queue repository. The concurrent programs you run copy over that information.

You must run these concurrent programs in the prescribed order and you must run them even if this is a fresh installation as doing so turns on work distribution.

To enable work distribution and synchronize work data:

1. Run the concurrent program Service: Synchronize Service Requests and Work Items.

   This concurrent program imports the following Service Request data into application work repository:

   - On-hold and Close settings (from Status)
   - Priority Code (from Severity)
   - Due Date
   - Owner Group Type
   - Group ID
   - Owner Type
   - Owner ID
   - Summary
   - Customer ID

2. If you are implementing distribution of service request tasks, then run the following concurrent programs in the specified order:

3. Synchronize & Activate Tasks Work Source.

   This Oracle Universal Work Queue program copies over information about tasks.

4. Service: Synchronize Service Request Task Work Items.

   This program copies over information about service request tasks.

   > **Note:** You must run these two concurrent program after Service: Synchronize Service Requests and Work Items.

17

Enabling Oracle Email Center

This chapter covers the following topics:

- Oracle Email Center Integration Overview
- Process for Enabling Oracle Email Center Integration
- Integrating Service Requests with Oracle Email Center
- Integrating the Contact Center with Oracle Email Center
- Merge Fields for E-mail Templates
- Disabling Local Email Client in Related Party Information Pages
- Disabling Forwarding, Resending, and Replying to Archived Messages
- Automatic Creation of Service Requests from E-Mails

Oracle Email Center Integration Overview

When you implement Oracle Email Center and integrate it with Oracle TeleService according to the procedures in this section, agents can:

- Compose and send e-mails to customers and customer contacts with just a click
- Use e-mail templates to populate the body of the e-mail, including information about the customer and the service request
- View replies from customers
- View a history of sent e-mails and their replies
- Access the archived e-mail messages themselves

> **Note:** All service modules covered in this guide use the same implementation steps and user interfaces. For Case Management,

please read "case" for all mentions of service request both in the user interface and this guide. For clarity, the text refers to service requests only.

E-Mail Context

The application provides the context for the e-mail communication. This means you can set up templates that automatically populate the e-mail with details about the service request and customer.

If you are implementing the Contact Center, the application supplies customer and contact e-mail addresses and information. The outgoing e-mails and customer replies become part of the interaction history for the contact or the customer.

In all other interfaces, the communication is always in the context of the service request and the application records the e-mail as part of the history of the service request.

This means that the agent must display an existing service request or create a service request before sending the e-mail.

> **Note:** The Contact Center does not provide the service request context in the Service Request tab.

The following topic outlines how an agent sends an e-mail related to a service request.

Sending an E-mail in the Context of a Service Request

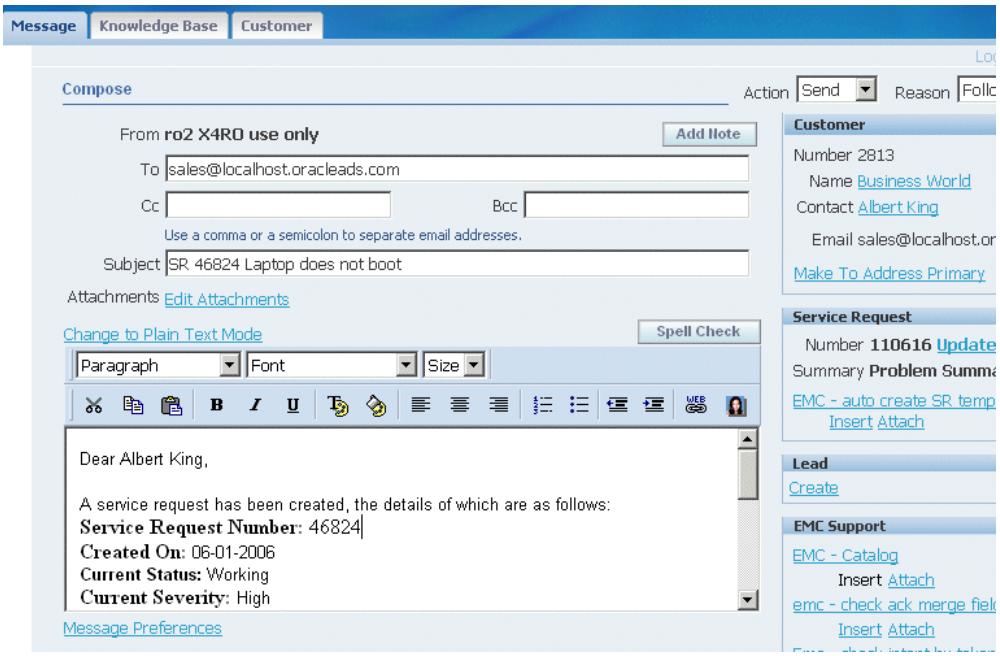
Here is how an agent uses e-mail to communicate with a customer about a service request. The agent:

1. Displays the service request.
2. Clicks an e-mail address link.
3. Composes the e-mail in Oracle Email Center's Compose window either manually or using a template.

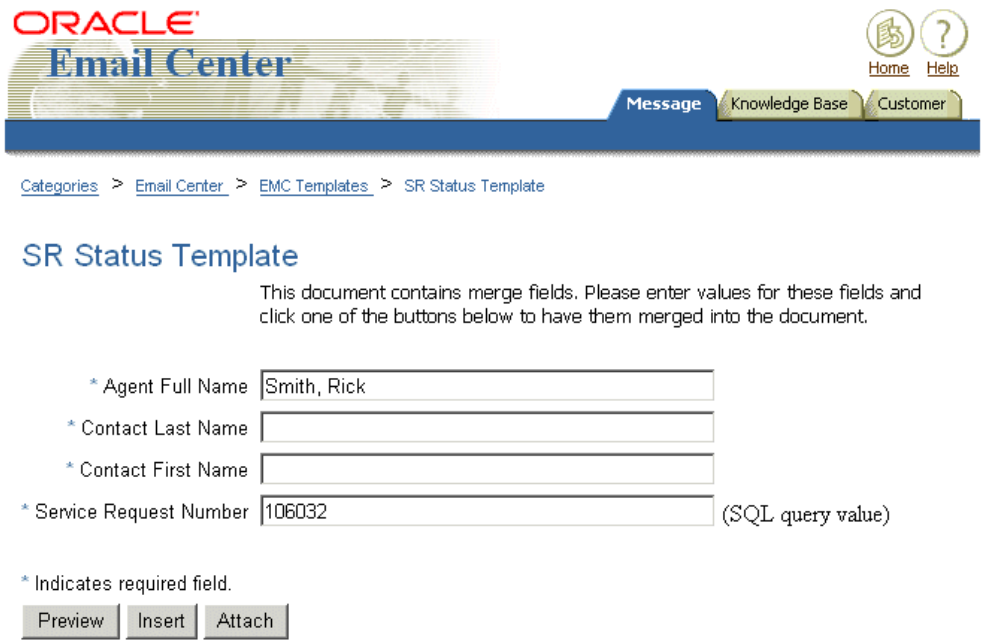
   The application automatically fills in the subject line of the e-mail with the service request number and the text in the summary field of the service request.

   You can specify additional text to be added in front of the service request number using system profile Service: Subject Prefix for Outbound Email in Service Request.

   You can create templates with merge fields which automatically populate customer, contact, and service request information. The following image shows a portion of the Compose page with the body populated by a template.



If the service request does not contain any of the information required by the merge fields, the template prompts the agent to enter it manually.



4. After the agent clicks **Send**, the Oracle Email Center appends the subject line with a numerical tag in square brackets: For example: [REF:1114331076]

   Because it is appended at the time Oracle Email Center sends the e-mail, this tag is not visible to the agent in the Compose window.

5. The application records the e-mail in interaction history.

   If you are using the Contact Center or Service Request windows, a record of the e-mail as well as a link to the full text is visible on the Interactions tab.

   If you are using Customer Support, Service Desk, or Case Management, then the e-mail appears in the Service Request's History tab.

6. If a customer replies to the e-mail, and you have set up the appropriate Oracle Email Center processing rule, the application automatically records the reply in the service request provided the original numerical tag is present in its entirety. The agent can view the reply by clicking on a link in the History tab in the Service Request update page.

E-Mail Templates

Using Oracle Email Center, you can specify multiple e-mail templates for different uses. Agents select the template they want to use from the Templates bin.

Optionally, you can designate one of these templates as the default template to populate the e-mail body automatically when the agent opens the page. Because there is no mapping between e-mail templates and service request types, however, you can specify

only one default template for all service request types.

If you are creating templates for very different uses, to handle invoice disputes and for communicating about product defects, for example, you may not want to specify a default template at all or create a very simple one.

Alerting Agents About Customer Replies

You can alert agents that a customer has replied to an e-mail by setting up Oracle Email Center auto-processing rules that automatically route the reply to the agent's Oracle Universal Work Queue or the Oracle Email Center Inbox.

For service requests, you can have the application automatically change the status of the service request to a specific status, for example "Email Received."

Oracle recommends that you create such a service request status for use with the Email Center Update Service Request process so that agents know when a service request has been updated with an e-mail.

If you are using standard service request security (where access to service requests is controlled by mapping service request types to responsibilities), then you must map the Email Center Administrator responsibility to the All Request Types selection. For details, see Mapping Responsibilities to Service Request Types, page 10-6.

Process for Enabling Oracle Email Center Integration

Follow these general steps for integrating Oracle TeleService with Oracle Email Center.

To enable the Oracle Email Center integration:

1. Set up Oracle Email Center as described in the *Oracle Email Center Implementation Guide* and ensure that users have the proper privileges:
   - Assign the Email Center Message Component responsibility
   - Assign the Email Center Resource Role (Email Center Agent or Supervisor).
   - Assign one or more e-mail account. To view an e-mail message the user must be assigned to the e-mail account where the e-mail resides. To compose an e-mail message, the user must be assigned to one or more e-mail accounts.
2. Set up e-mail templates.

   You can use the merge fields listed in the following topics provided that these fields are used in your implementation:
   - Service Request Merge Fields, page 17-9
   - Contact Center-Specific Merge Fields, page 17-11

Note: Service Desk and other implementations that support employees rather than customers cannot use most of the available merge fields. This is because employee information is not stored in the Oracle Trading Architecture data model.

3. To prevent agents from forwarding and replying to archived e-mails, set the following system profiles to No:
   - IEM: Message Component: Hide History Resend
   - IEM: Message Component: Hide History Forward
   - IEM: Message Component: Hide History Reply

   See Disabling Forwarding, Resending, and Replying to Archived Messages, page 17-18.

4. Enable the integration for service requests by carrying out the steps described in Integrating Service Requests with Oracle Email Center, page 17-6.

5. If you are using the Contact Center, follow the steps outlined in Integrating the Contact Center with Oracle Email Center, page 17-8.

Integrating Service Requests with Oracle Email Center

These steps are specific to service requests integration.

Note: The service request integration does not apply to the Service Request tab of the Contact Center.

To integrate service requests:

1. Set the following system profile options:
   - Service: Default Email Category

     Set this profile option to specify the template category displayed in the Compose E-mail window when it is launched from the Service Request window.

   - Service: Enable Outbound Email in Service Request

     A setting of Yes enables the integration with Oracle Email Center. By default, this system profile is set to No, launching the agent's local e-mail client.

- Service: Default Email Template

  Set this system profile to specify an e-mail template that automatically populates the Compose window. You can specify only one default template for all service request types, so if your service requests vary in content, you may wish to specify a very simple default template or permit agents to choose a template at the time they compose the message.

- Service: Subject Prefix for Outbound Email in Service Request

  The application automatically populates the Subject line of outgoing e-mails with the service request number and problem summary. You can use this system profile to specify additional brief text to be inserted before the service request number.

  By default the subject line appears as:

  <service request number> <subject>

  For example:

  "2345 Hard drive making noise"

  By adding text you can change this to:

  <text you enter> <service request number> <subject>

  For example:

  "Request Number 2345 Hard drive making noise"

- Service: Enable Defaulting CC field in Email Header While Sending An Email In Service Request Form

  In the Service Request window, you can automatically copy all service request contacts on outgoing e-mails by setting this system profile to Yes.

  When an agent sends an e-mail from the Service Request window, the application adds all service request contacts to the CC address line. If the agent is e-mailing one of the contacts, all remaining contacts are copied. The application defaults the e-mail addresses only when agents launch the Compose window from the Service Request window.

  Setting this profile to No, the default, leaves the CC address line blank.

  > **Note:** This option is not available in the other Oracle TeleService modules including Customer Support, Service Desk, and Case Management.

2. Optionally, disable access to local e-mail clients from additional pages accessible through the service application.

The integration of Oracle Email Center you have enabled applies only in the pages of your service application. The customer detail page accessible to agents through the Compose page still launches the local e-mail client.

To prevent agents from doing so, follow the procedures outlined in Disabling Local Email Client in Related Party Information Pages, page 17-14.

3. To notify agents when customers reply to e-mails sent from a service request:
    1. Set up a special service request status such as "Email Received". The status cannot be an initial status for a service request.
    2. Enter that status in the status groups that map onto your service request types.
    3. Set up an update service request auto-processing rule for that status. See the *Oracle Email Center Implementation Guide* for details.
4. If you are supporting employees with the Service Desk, Customer Support, or the Service Request window (Oracle Forms), then you can set up Oracle Email Center to automatically create service requests from incoming employee e-mails. For more information, seeAutomatic Creation of Service Requests from Employee E-Mails, page 17-18.

Integrating the Contact Center with Oracle Email Center

Use these additional steps to integrate Oracle Email Center with Contact Center. Please note that this integration is not available in the customer pages of Customer Support, Service Desk, and Case Management.

To enable customer e-mails in the Contact Center:

1. Set the following system profile options:
    - Customer Care: Enable Outbound Email From the Contact Center

      This system profile enables the e-mail icons on the application's tool bar. A setting of Yes" the default value, enables the icons. A setting of No disables the icons and functionality.

    - Customer Care: Default Template for Outbound Email from Contact Center

      Set this profile to the e-mail template you wish agents to use as a default for creating e-mails. There is no predefined template available, so you must create your own.

    - Customer Care: Default Category for Outbound E-mail from Contact Center

      To restrict the use of Email Center templates by Oracle Marketing Encyclopedia

System (MES) product categories, set this profile to any of the existing categories.

2. You can specify the responsibilities that can create e-mails within the Contact Center by mapping the function CSCSFECW according to the procedures described in *Oracle E-Business Suite Setup Guide.* This function controls access to the Open Email Compose Window icon in the toolbar and the corresponding menu selection. The predefined Service responsibility includes this mapping.

3. To alert agents to incoming replies from customers, you must set up:
   - Service agents as Oracle Email Center users
   - Auto-processing rules to channel the replies to the agents' inboxes.

     See the *Oracle Email Center Implementation Guide* for details.

Merge Fields for E-mail Templates

You can include merge fields in your templates that supply customer, contact, and service request information. For example:

```
Hi ((*SR_CONTACT_NAME*)),
Your Service Request status is ((*SR_STATUS*)).
Thanks,
Service Department
```

The tables in the following sections list and describe merge fields (service request parameters) for service requests and the Contact Center.

Service Request Merge Fields

The following table lists the service request merge fields you can use to supply information about the service request:

Service Request Parameter	Description
SR_CUSTOMER_NAME	Customer name
SR_CONTACT_NAME	Contact name
SR_ACCOUNT_NUMBER	Account number
SR_NUMBER	Service request number

Service Request Parameter	Description
SR_STATUS	Service request status
SR_TYPE	Service request type
SR_SEVERITY	Service request severity
SR_URGENCY	Service request urgency
SR_REPORTED_DATE	Service request incident date
SR_GROUP_OWNER	Service request group owner
SR_INDIVIDUAL_OWNER	Service request individual owner
SR_ITEM	Item
SR_ITEM_DESC	Item Description
SR_INSTANCE	Instance
SR_SERIAL_NUMBER	Serial number
SR_REVISION	Revision
SR_TAG	Tag
SR_SYSTEM	System
SR_CONTRACT	Contract
SR_CONTRACT_LINE	Contract Line
SR_COMPONENT	Component
SR_ COMPONENT _DESC	Component description
SR_ COMPONENT _REV	Component revision
SR_SUBCOMPONENT	Subcomponent

Service Request Parameter	Description
SR_ SUBCOMPONENT _DESC	Subcomponent description
SR_ SUBCOMPONENT _REV	Subcomponent revision
SR_SUMMARY	Service request summary
SR_RESOLUTION_SUMMARY	Resolution summary
SR_RESOLUTION_BY	Service request resolution by date
SR_RESPOND_BY	Service request respond by date
SR_SUPPORT_SITE	Support site
SR_ ESCALATION _LEVEL	Escalation level

Contact Center-Specific Merge Fields

The following tables list the customer and contact information merge fields you can use in e-mail templates for the Contact Center:

Customer Parameters

The following table lists customer related parameters:

Customer Parameter	Description
ACCOUNT_NUMBER	Account number displayed on the header
CP_ADDRESS	Identifying address (the address displayed on Contact Center header)
CP_CITY	City for the identifying address
CP_COUNTRY	Country for the identifying address
CP_FIRST_NAME	Customer's first name
CP_LAST_NAME	Customer's last name

Customer Parameter	Description
CP_PARTY_NUMBER	Party Number
CP_POSTAL_CODE	Postal Code for the identifying address
CP_PRIMARY_EMAIL	Identifying e-mail address
CP_PRIMARY_PHONE	Identifying phone number
CP_STATE	State for the identifying address
CRITICAL_FLAG	Critical Customer Flag
CUST_URL	Identifying URL
CUSTOMER_NAME	Customer's name

Contact Parameters

The following table lists the contact-related parameters:

Contact Parameter	Description
CONTACT_NAME	Party name
CON_FIRST_NAME	First name
CON_LAST_NAME	Last name
CON_PARTY_NUMBER	Party number (not applicable for employees)
CON_PRIMARY_PHONE	Primary phone
CON_PRIMARY_EMAIL	Primary e-mail address
CON_ADDRESS	Identifying Address displayed on the contact center header
CON_CITY	City

Contact Parameter	Description
CON_COUNTRY	Country
CON_EMAIL_ADDRESS	Contact's e-mail address. This is the address used for e-mail communication
CON_MIDDLE_NAME	Contact's middle name
CON_POSTAL_CODE	Postal Code
CON_STATE	State
CONT_URL	Primary URL
RELATION	Relationship displayed on Contact Center header
TIMEZONE	Contact's time zone

Interaction Parameters

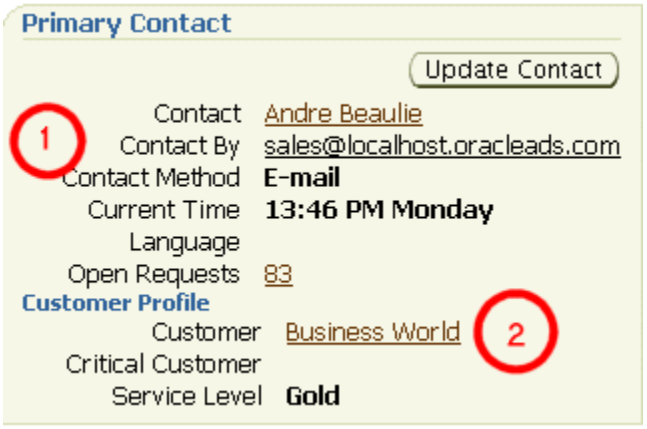
The following table lists the interaction parameters:

Interaction Parameter	Description
INTERACTION_ID	Interaction ID
DEFAULT_OUTCOME_FOR_INTERACTION	Default outcome for an interaction
DEFAULT_RESULT_FOR_INTERACTION	Default result for an interaction
DEFAULT_REASON_FOR_INTERACTION	Default reason for an interaction
DEFAULT_OUTCOME_FOR_ACTIVITY	Default outcome for an activity
DEFAULT_RESULT_FOR_ACTIVITY	Default result for an activity
DEFAULT_REASON_FOR_ACTIVITY	Default reason for an activity

Disabling Local Email Client in Related Party Information Pages

Implementing the Oracle Email Center affects only the service request pages owned by the Service application, not the additional Party Information pages users can access from the service request.

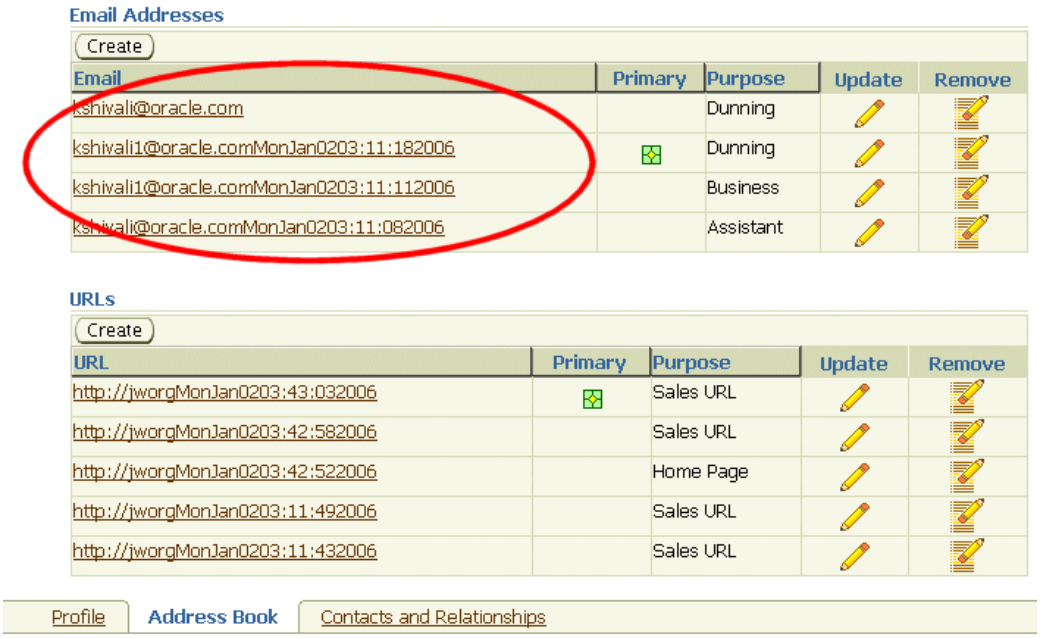
This means an agent clicking on the e-mail address link in the Primary Contact container in the Update Service Request or Update Case page, (highlighted as region 1 in the image below), gets to compose the e-mail in the Oracle Email Center's Compose page.



If the agent displays the customer details by clicking the Customer link (2), and sends an e-mail from there, then the application launches the local e-mail client instead.

If you do not wish to permit agents to use their local e-mail clients from these pages, then you must disable the e-mail links using Oracle Applications Framework's personalization.

The image below shows the e-mail address links on the Address Book tab of the Party Information page you must disable.

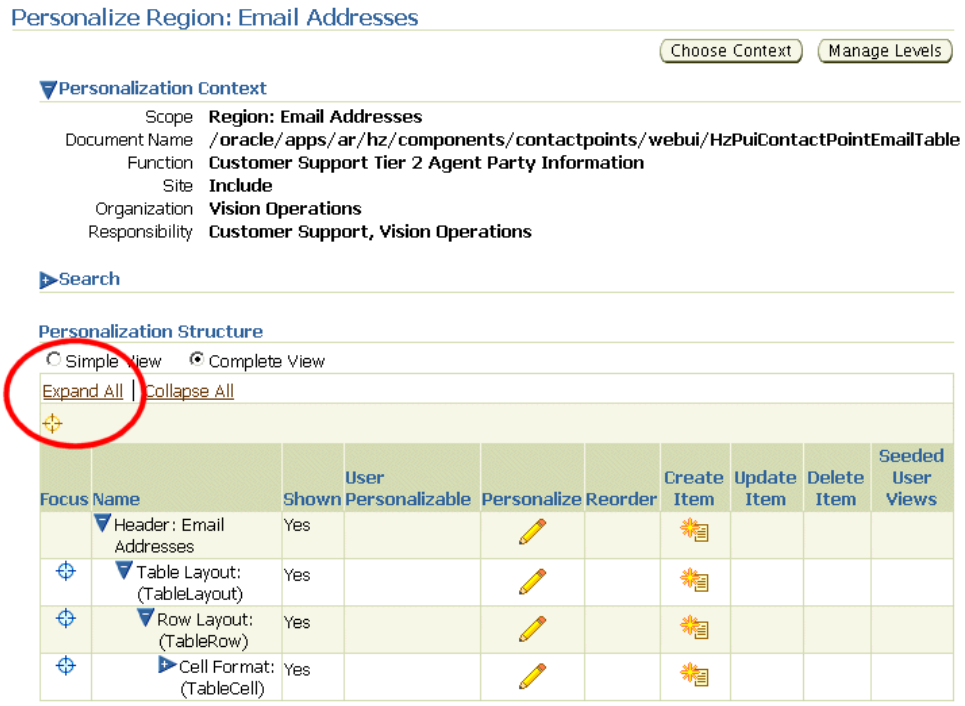


To disable the e-mail address links:

1. Turn on personalization by setting the following system profiles to Yes:
   - FND: Personalization Region Link Enabled
   - FND: Personalization WYSIWYG Enabled
   - Personalize Self-Service Defn
2. Navigate the Address book tab of the Party Information page.

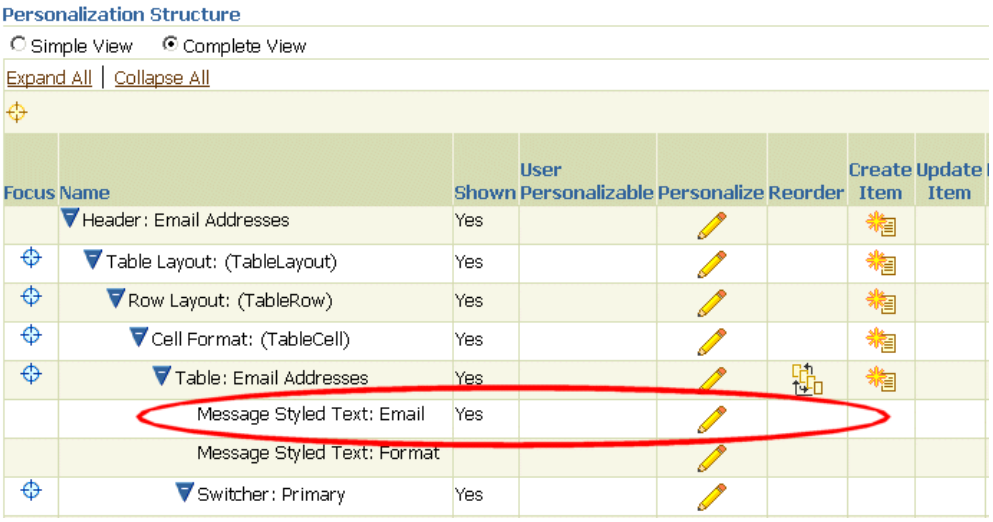
3. Click the Personalize Email Addresses link in the highlighted region of the page shown above.

4. The Personalize Region: Email Addresses page appears.

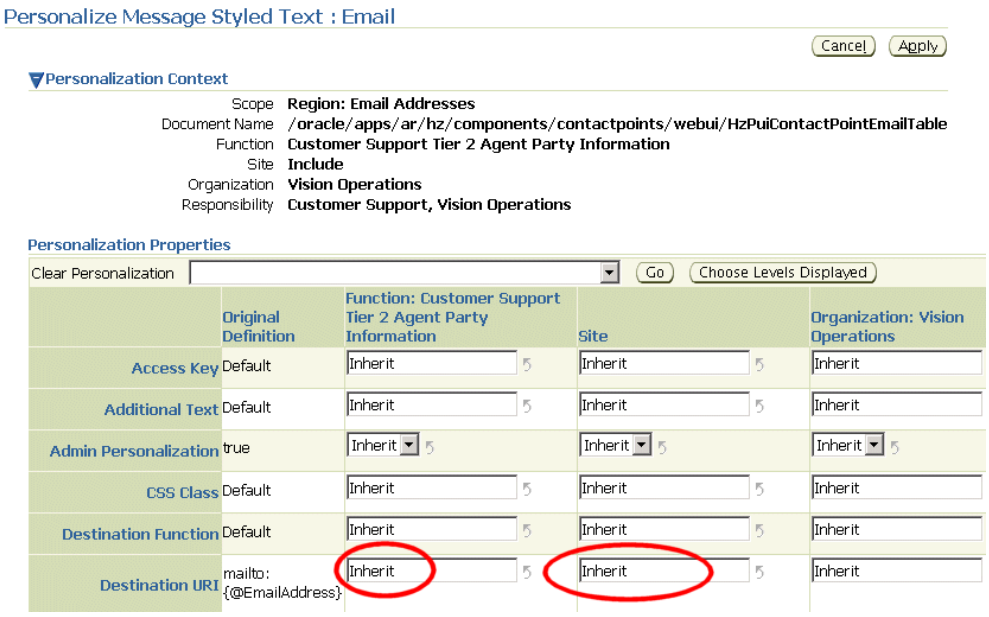


5. Click **Expand All** (highlighted above).

6. Click the Personalize icon in the Message Styled Text: Email row (highlighted in the image below).



The Personalize Message Styled Text: Email page appears.



7. Delete the text "Inherit" from both the Function and Site cells (as highlighted in the image above).

8. Click **Apply** to save.

Disabling Forwarding, Resending, and Replying to Archived Messages

By default, agents viewing archived messages can at the click of a button:

- Resend a previously sent message
- Forward a sent or received message
- Reply to a received message

You can disable these buttons by setting the following system profiles to Yes:

- IEM: Message Component: Hide History Resend
- IEM: Message Component: Hide History Forward
- IEM: Message Component: Hide History Reply

By default, all of these system profiles are set to No.

Automatic Creation of Service Requests from E-Mails

Oracle Email Center provides agents with the ability to create business objects such as a

service request and at the same time provides message composing/viewing capabilities to business users such that every email interaction is recorded and archived.

For more information on automatically creating a service request, see *Service Requests* section in the *Oracle Email Center Implementation Guide*.

18

Automatic Closure of Service Requests with Tasks

This chapter covers the following topics:

- Understanding Closure Automation for Service Requests with Tasks
- Setting Up Automatic Closure for Service Requests

Understanding Closure Automation for Service Requests with Tasks

Service requests can have multiple associated tasks that have a completion status independent of the service request itself. If you do not implement closure automation, the closure of each task is independent of the closure of the service request. This means that agents must remember to close all tasks when they close a service request and remember to close the service request after all tasks are completed.

You can automate closure by one or both of the following methods:

- Downward Propagation, page 18-1
- Upward Propagation, page 18-2

Downward Propagation

If an agent wishes to close the service request, you can have the application check if the service request is ready to be closed and then automatically close all related tasks.

The application prevents agents from closing the service request for any of the following reasons:

- If any task with the Restrict Closure check box selected is not closed

  Agents can select this check box when they create a task to prevent closure of the service request when the task is not in a closed status.

- If the service request has associated non-field service tasks that are still being worked on

  The application determines a task is still being worked if the task start date is equal or earlier than the system date, and if there is no end date. The application checks both the scheduled and actual start date. This is because an engineer may start a task without having yet had the chance to record the actual start date.

  This rule does not check Oracle Field Service tasks as this application has its own rules for preventing closure.

- If the service request has field service tasks that are scheduled or in progress

  See Oracle Field Service documentation for details.

- If the service request includes charges that have not yet been successfully submitted

  The application only checks charge lines of type Actual with the OM Interface check box selected.

The application does not check for open Oracle Enterprise Asset Management work orders, Oracle Depot Repair repair orders, and maintenance requirements. This means that the service request and associated tasks can be closed even with work orders or repair orders in progress.

You can enable downward propagation by setting the system profile Service: Validate and Auto Close on Service Request Closure to Yes. The system profile Service: Task Auto Close Status determines the status of the closed tasks.

Oracle Complex Maintenance Repair, and Overhaul closes its own maintenance requirements.

The closure of associated tasks is immediate. As soon as the agent closes the request, all of the tasks are closed as well. If any of the rules are violated, the application warns the agent with an error message.

Upward Propagation

If all service request tasks have been closed or all charges have been submitted, you can have the application check if the service request is ready to be closed and then close it.

The application prevents the service request from being closed if:

- Not all tasks are closed

  The application prevents the service request from being closed if any associated task is in a status that does not have the Closed check box selected.

- If any debriefed tasks have encountered errors when being converted to charges

- If there are any charges that have not been submitted to Oracle Order Management

- If there are any Oracle Depot Repair repair orders, Oracle Enterprise Asset Management work orders, or Oracle Complex Maintenance Repair, and Overhaul maintenance requirements.

  Closure is prevented if any of these are associated with the service request, regardless of status.

You can turn upward propagation on by setting the system profile Service: Auto Closure of Service Request to Yes. You specify the status you wish to apply to the service request in Service: Service Request Auto Close Status.

The speed with which the service request is closed depends on your implementation of the Oracle Workflow Event Manager.

This module has seeded event subscriptions for the following two business events:

- **oracle.apps.jtf.cac.task.updateTask**: This event is raised whenever a task is updated.

- **oracle.apps.cs.chg.Charges.submitted**: This event is raised whenever a charge line is submitted to Order Management.

For information on business events and the manager, see the *Oracle Workflow Developer's Guide*.

Which Method to Choose

Your organization can take advantage of either or both of these methods of automating closure. Most organizations may want to turn on at least the downward propagation because it prevents agents from accidentally closing service requests that have pending tasks.

If your organization delivers field service, you may benefit from enabling upward closure. If your organization does not perform manual wrap-up of service requests after the engineers enter debrief information in the field, you can have the service requests set to a final status.

Or you can have all service requests set to a special wrap-up status that tells agents which service requests need to be wrapped up.

Setting Up Automatic Closure for Service Requests

Use this procedure to set up automatic closure of service requests and associated tasks.

To set up automatic closure for service requests and tasks:

1. Under the Service responsibility, navigate to Setup, then Others, and select Profile System Values.

2. To turn on downward propagation, set the following two system profiles:

   - Set Service: Validate and Auto Close on Service Request Closure to Yes at the site level to turn on downward propagation. By default this profile is set to No.

   - Set Service: Task Auto Close Status to the status you wish to use for all tasks closed automatically. By default, this profile option is not set to any status.

3. To turn on upward propagation, set the following two system profiles:

   - Set Service: Auto Closure of Service Request to Yes at the site level to turn on upward propagation. By default this profile is set to No.

   - Set Service: Service Request Auto Close Status to the status you wish to use for a service request that has been closed automatically. By default, this profile option is not set to any status.

19

Electronic Approvals and Records

This chapter covers the following topics:

- Service Request Electronic Approvals and Records Overview
- Special Service Request Setup Concepts
- Setting Up the Capture of Approvals and E-Records
- Example of Status and Related Setups
- Setting Up a Triggering Service Request Status
- Downloading and Registering the E-Record Template
- Specifying a Modified Template for Use by Oracle E-Records
- Viewing the Status of Approval Requests of All Service Requests
- About the E-Record Template

Service Request Electronic Approvals and Records Overview

In Oracle TeleService, the capture of electronic audit records (e-records) and electronic signatures (e-signatures) is triggered by the service request status (case status) field. Whenever an agent sets a service request (case) to a special status, the application captures the e-record and sends out any approval requests via the Oracle Workflow notification process. Approvers access these requests from the notification in their Inbox.

Typical Uses

Here are two typical ways the integration can be used:

- Use Case 1: Approval Before Work Can Begin

  A medical equipment manufacturer requires sign-off before technicians can change the configuration of a particular piece of equipment such as an X-ray machine.

- Use Case 2: Approval Before Closure

  A manufacturing company requires special sign-off before service requests for safety violations can be closed.

Both these use cases are used to illustrate the setups in this chapter.

Integration Setup Overview

To implement this integration, you must set up:

- Any approval rules using Oracle Approvals Management.
- The templates for the e-record in Oracle E-Records.
- Service request status and related setups as described in this chapter.

You must have both the Oracle Approvals Management and Oracle E-Records applications implemented before you begin. See *Oracle HRMS Approvals Management Implementation Guide* and *Oracle E-Records Implementation Guide* for details.

> **Note:** The integration supports deferred-only approvals. It does not support online e-signature capture or e-signature capture via e-mail.

About E-Records

The e-record generated by the application serves both as a historical record of the service request and as the report, which is sent for approval. The application generates the e-record when the service request is set to the triggering status and updated. The content is based on a specific service Oracle E-Record template which has been seeded for this purpose.

The template (CSERecordTemplate.rtf) is an RTF document with embedded XML codes that pull in service request information. The template is set up to provide either a summary or a detailed report. For a listing of the attributes listed in each report and the differences between them see About the E-Record Template, page 19-18.

By default, the application generates the summary report to conserve system resources. You can modify the electronic record template to remove or add attributes or change its appearance. If you do, you must upload and register the new file using either Oracle XML Publisher or Oracle E-Records. For details, see Downloading and Registering the E-Record Template, page 19-15.

Service Event

Your application provides the following single seeded event for use with Oracle Approvals Management:

- Event name: Service Request Approval
- Event Key: oracle.apps.cs.sr.ServiceRequestApproval
- Online or Deferred: Deferred

Special Service Request Setup Concepts

This topic describes the special service application setups for the integration. These are:

- Intermediate Statuses, page 19-3
- Triggering Statuses, page 19-4
- Approval and Rejection Action Statuses, page 19-4
- Status Groups and Status Transition Rules, page 19-7

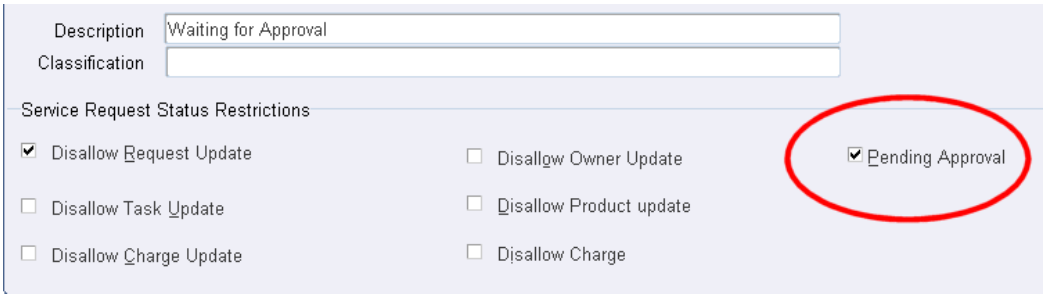
The actual setup steps are outlined in Setting Up the Capture of Approvals and E-Records, page 19-9.

> **Note:** You must be familiar with the terminology and function of various service request objects such as statuses, service request types, and related setups. See About Statuses, Status Groups, and Service Request Types, page 7-2.

Intermediate Statuses

An intermediate status is the status of the service request while it is waiting for the approval process to complete, for example, "Waiting for Approval".

To create an intermediate status, you must select the Pending Approval check box while setting up the status in the Service Request Statuses window.



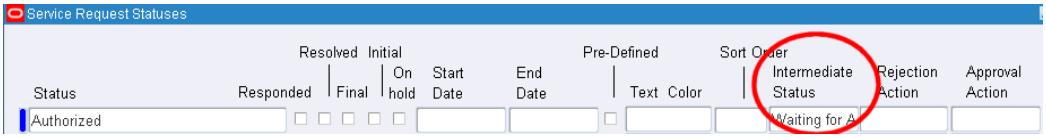
Triggering Statuses

The application starts the approvals and e-record capture process you have implemented when an agent sets the service request to a triggering status.

If the Oracle Approvals Management rules you have set up determine approval is required, then the application automatically sets the service request to the intermediate status (such as "Waiting for Approval") while it waits for the approval process to complete.

If approval is not required, then the application resets the service request to the triggering status.

A status you are setting up becomes a triggering status when you enter an intermediate status in the Intermediate Status field as highlighted in the following image.



If your process generates an electronic record only (no approvals required), then you must still enter an intermediate status. However, as the e-record gets generated immediately when the service request is updated, the application never sets the service request to that intermediate status.

> **Note:** A triggering status cannot be created as an initial status. This is because the application does not support approvals for service requests on creation.

Approval Action and Rejection Action Statuses

Optionally, you can have the application set the service request to special statuses when the service request is approved or rejected. This is accomplished by making entries in the Rejection Action and Approval Action fields of the triggering status. You can make entries in one or both fields.

You want to specify an approval or rejection status if some action such as an escalation needs to happen as a result of the approval process outcome or if agents need to know if the particular service request was approved or not.

Approval Action Status

If you do not enter an approval status, the application sets the service request to the triggering status. For example, if the triggering status is "Closed" then the status becomes "Closed" after approval.

If the approval rules you have designed trigger the approval process only in certain

cases (for certain products, for example), then without an approval status agents won't know if a service request was closed because it was approved or simply closed because no approval was necessary.

The following examples illustrate the different behavior with and without the approval status for a company that requires approval before service request closure (Use Case 2).

Approval Before Closure With Approval Action Status

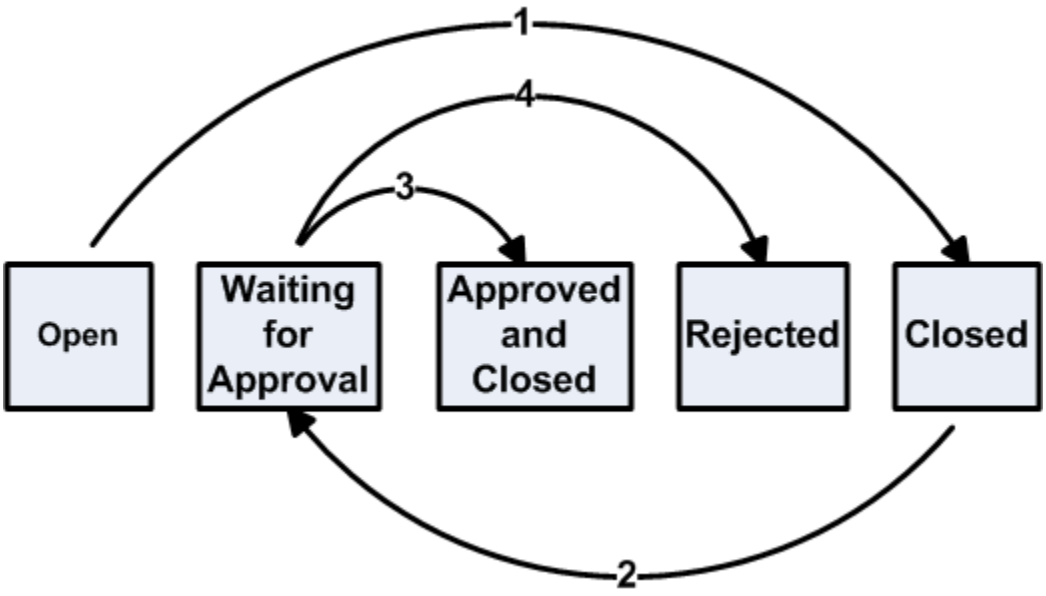
Suppose you create the statuses listed in the following table for the approval process:

Status	Description
Open	Initial
Closed	Triggering and Final
Waiting for Approval	Intermediate
Approved and Closed	Approval Action and Final
Rejected	Rejection Action

The application behaves as follows (numbers in brackets refer to the diagram below):

- An agent wants to close the service request and so sets the service request status to **Closed** (1).
- If an approval process is not triggered by the rules you set up, the service request remains Closed.
- If approval is required, then the application sets the status to **Waiting for Approval**. (2)
- If the service request is approved, then the application resets the service request status to **Approved and Closed**(3)
- If it is rejected, then the status becomes **Rejected**.(4)

Note that the service request can end up in one of two final statuses: the triggering status "Closed" if no approval is required, or "Approved and Closed" if approval is required and obtained.



Approval Before Closure Without an Approval Action Status

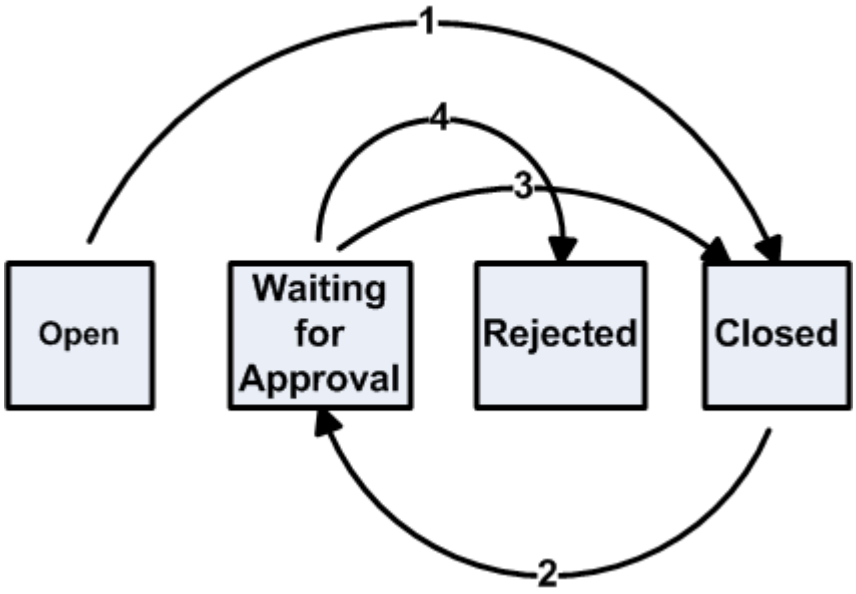
To set service requests to the same "Closed" status regardless of any approval process, you can set up your statuses without the rejection action status:

Status	Description
Open	Initial
Closed	Triggering and Final
Waiting for Approval	Intermediate
Rejected	Rejection Action

Then the application behaves as follows:

- The agent sets the service request status to **Closed** (1).
- If your rules determine that service request does not requires any approval, the status remains Closed.
- If approval is required, then the application sets the service request to **Waiting for Approval** (2).
- If the service request is approved, the application resets the service request status back to **Closed** (3)

- If it is rejected, the status gets set to **Rejected**.(4)



Rejection Action Status

If you do not enter a rejection status, then the application reverts the service request to its previous status. If the agent had changed the service request from "Open" to the triggering status "Closed", a rejection resets the status to "Open". If you do not use a rejection status, then agents cannot tell that the service request was rejected without looking at the history log.

Status Group Transition Rules

If your triggering status is not the final status and you want to ensure that all service requests are evaluated by your rules, you can set up status group transition rules to ensure that agents cannot bypass the triggering status.

Status groups determine the statuses that are available for a particular service request type. Their transition rules specify which status can be changed to which.

To prevent agents from manually setting the status to the Repair Rejected status, you must set up the following transition rules:

- "New" to "Closed"
- "New" to "Pending Approval"
- "Pending Approval" to "Closed"
- "Pending Approval" to "Rejected"

- "Rejected" to "Closed" (if you want users to be able to resubmit)

Note that the above transition rules permit the transitions required by the approvals process as a whole not just those by the agent. Although the transitions permit the status to be changed from New to Pending Approval, the agents are prevented from making that status change by the transitions enforced by the approvals process itself.

You do not need to set up transition rules if:

- Your triggering status is the service request's final status.

  This is because all service requests must be closed and the triggering status enforces its own rules.

- Agents decide on their own if the rules must be invoked.

  A maker of medical devices that requires approvals for changes in equipment configuration may leave it up to agents to set the service request to the triggering status of "Repair" only if a unit needs servicing by a technician.

The status transition rules prevent agents from setting the service request to an intermediate status, but it does not prevent them from setting the service request to either the rejection action or the approval action statuses. You must set up status group transitions to prevent agents from using those statuses. For example, if you have the following statuses:

- New Pending Approval (the intermediate status)
- Repair Rejected (the Rejection Action)
- Closed (the triggering status)

As there is no Approval Action status in this setup, the application sets the service request to Closed when approved. In this case, to prevent agents from manually setting the service requests to "Repair Rejected", you must set up the following transitions in the status group:

- New to Closed
- New to Pending Approval
- Pending Approval to Closed
- Pending Approval to Repair Rejected

If you want agents to resubmit after a rejection, then you must also include: Repair Rejected to Closed. See About Statuses, Status Groups, and Service Request Types, page 7-2.

Setting Up the Capture of Approvals and E-Records

Use this general procedure as a guide for setting up the Oracle E-Records and Oracle HRMS Approvals Management integration. Where applicable, each step provides a reference you can follow to obtain more details.

Prerequisites:

- Implement Oracle E-Records as described in the *Oracle E-Records Implementation Guide*.
- Implement Oracle Approvals Management as described in the *Oracle HRMS Approvals Management Implementation Guide*.

To set up the capture of approvals and e-records for a service request type:

1. Plan out which statuses you need to set up.

   Note: A simple example at the end of this topic illustrates the status and related setups for approvals before agents can close service requests (Use Case 2). See Example of Status and Related Setups, page 19-12.

2. Create the intermediate status. The procedure is similar to the procedure described in Setting Up Service Request Statuses, page 7-8. There is one additional step: for intermediate statuses you must select the Pending Approval check box. When you do, the application automatically selects the following check boxes:

   - Disallow Request Update

     Prevents the service request from being updated while the service request is in the intermediate status.

     - On Hold

       Placing a service request on hold prevents the application from distributing the service request to agents when they click the Get Next Work button while the service request is awaiting approval.

   You can override the settings of both of these check boxes.

   Note: Please note the following:

   - You cannot reuse the same intermediate status for multiple triggering statuses.

- Agents cannot set service requests to the intermediate statuses themselves. The application does this automatically.

- An intermediate status cannot be an initial status in the status group.

3. Optionally, create the rejection action and approval action statuses. This setup is the same as for general statuses.

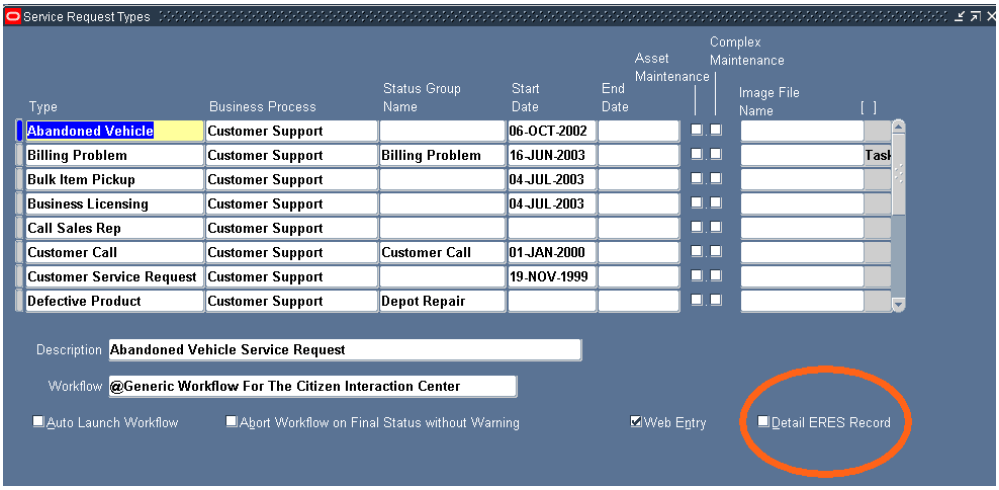
4. Set up the trigger status. See Setting Up a Triggering Service Request Status, page 19-14.

5. Group the statuses into a status group using the procedure outlined in Setting Up Status Groups, page 7-12.

6. Optionally, set up the status transition rules for the status group. For details, see Status Groups and Status Transition Rules , page 19-7.

   You must permit all the transitions required by your triggering status setup.

7. To have the application generate the detailed e-record report for your service request type rather than the default summary report, navigate to Setup, Definitions, Service Request Type, and select the Detail ERES Record check box in the Service Request Types window (highlighted in the image below).



   If this check box is not selected, the default summary report is generated.

   For more information on setting up service request types, see Setting Up Service Request Types, page 7-14.

8. Map the status group to the service request type.

   See About Mapping Status Groups to Service Request Types and Responsibilities, page 7-7.

9. Optionally, modify the seeded electronic record (e-record) template and register the new version according to the procedures outlined in Downloading and Registering the E-Record Template, page 19-15.

   You can add or remove information or modify the template's appearance. Oracle does not recommend extensive modifications. See About the E-Record Template, page 19-18 for guidelines and a list of service request attributes used by the template.

10. Specify the variable EREC_STYLE_SHEET to the new template name you want to use for creating e-records.

11. If you require approvals:

    1. Make sure you have set the variable ESIG_REQUIRED to Y.

    2. Switch responsibility to Approvals Management Business Analyst.

    3. Choose **Service Request Approval** as the Transaction Type to do your setup.

    4. Set up the approval flow in Oracle Approvals Management according to the procedures described in the *Oracle HRMS Approvals Management Implementation Guide*. You can set up different approval rules based on parameters passed by the service request.

       The following table lists the seeded service request parameters and the corresponding names used by the Oracle Approvals Management (OAM) user interface:

Service Request Parameter	OAM Name
Item	REQUEST_ITEM
Item Category	REQUEST_CATEGORY
Problem Code	REQUEST_PROBLEM_CODE
Service Request Severity	REQUEST SEVERITY
Service Request Status	REQUEST_STATUS

Service Request Parameter	OAM Name
Service Request Type	REQUEST_TYPE
Service Request Urgency	REQUEST_URGENCY

You can add any additional parameters from the detailed e-record template.

12. To have the application automatically capture approval information (including approver names, outcomes, and comments) as a note in the service request, you must set the system profile Service: Note Type for ERES Comment to any note type. By default, this system profile is null. This means the application does not capture the information in the service request. Users must instead go to the e-record to view it.

13. If you are capturing Oracle Quality data for the service request, then you must set up separate e-record capture and e-signature approval rules according to the procedures in *Oracle E-Records Implementation Guide* and the E-Records and E-Signatures for Oracle Quality section of the *Oracle Quality User's Guide*. The e-record capture and approval processes for service requests and Oracle Quality are independent. However, approvers and other users viewing the service request e-record can view the Oracle Quality e-record by following the link in the Related E-Records section.

Example of Status and Related Setups

This section uses an example to illustrate the status and related setups.

For example, if your company requires approvals from safety managers before agents can close service requests involving safety violations.

If the safety managers do not approve the solution, the service request must be escalated.

If the safety managers approve, the service request is closed automatically.

Here are the setup steps for this example:

1. Set up the statuses.

   The triggering status is the final status: "Closed".

   Because you want to escalate service requests when they are rejected, you need a rejection action status.

   You do not need to set up an approval action status as you want the application to set the service request in the Closed status if approval is obtained or no approval is

required.

The statuses you need are the same as those described in Approval Before Closure Without an Approval Action Status, page 19-6. Additional details about entries you must make in the status setup window are shown in the table below:

Status	Initial Check Box	Final Check Box	On Hold Check Box	Intermediate Status Field	Rejection Action Field	Approval Action Field	Pending Approval Check box	Disallow Request Update Check Box
Open	Selected	Null	Null	Null	Null	Null	Null	Null
Closed	Null	Selected	Selected	Waiting for Approval	Rejected	Approved	Null	Null
Waiting for Approval	Null	Null	Selected	Null	Null	Null	Selected	Selected
Rejected	Null	Null	Selected	Null	Null	Null	Null	Selected

Please note that:

- Open is the initial status
- Closed is the triggering status.
- Waiting for Approval is the intermediate status.
- Selecting the On Hold check box prevents the application from reassigning the service request
- Selecting the Disallow Request Update check box prevents agents form updating the service request.

2. Group the statuses by creating a service request status group called "Safety Complaint Group," for example. The following table shows the setup:

SR Status Group	Statuses
Safety Complaint Group	Open, Closed, Waiting for Approval, Rejected

3. You must set up status transition rules to prevent agents from setting the service request to the approval action and rejection action statuses.

4. Because you have only one status group for all users in this example, you can associate the status group with the service request type on the Service Request Type setup window as shown in the table below:

Service Request Type	Status Group
Safety Compliant	Safety Complaint Group

Setting Up a Triggering Service Request Status

Use this procedure to set up service request statuses that trigger the Oracle E-Record processes you have set up.

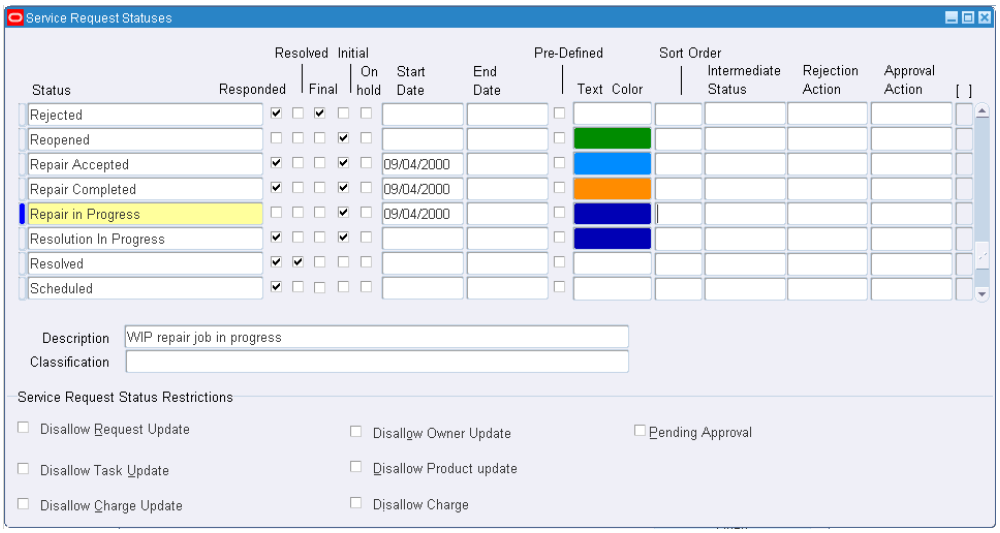
Prerequisites:

You must set up the intermediate, rejection action, and approval action statuses.

To set up a triggering service request status:

1. Under the Service responsibility, navigate to Setup, then Definitions, and select Service Request Statuses.

   The Service Request Statuses window appears.



2. Enter a name in the Status field. This is what the agent sees when the application sets the service request to this status.

3. Enter an intermediate status using the Intermediate status list of values. If the Oracle E-Record process you have set up requires approvals (e-signatures), then the service request will be set to this status until all the approvals are obtained. If approvals are not required, then the service request remains in the triggering status.

4. If approvals are required, then select the Approval Action status and the Rejection Action status.

5. To assign a color to the text the support agent sees in the Status field of the Service Request window use the Text Color field.

Downloading and Registering the E-Record Template

You can use Oracle XML Publisher to download the seeded template for modification. After modification you must rename and upload the new template file and specify it as the default.

For details on using Oracle XML Publisher, see the *Oracle XML Publisher Report Designer's Guide.*

Use these guidelines for downloading the seeded template for modification and uploading the new version.

To download or register the template using Oracle XML Publisher:

1. Under the XML Publisher Administrator responsibility navigate to Home, Templates.

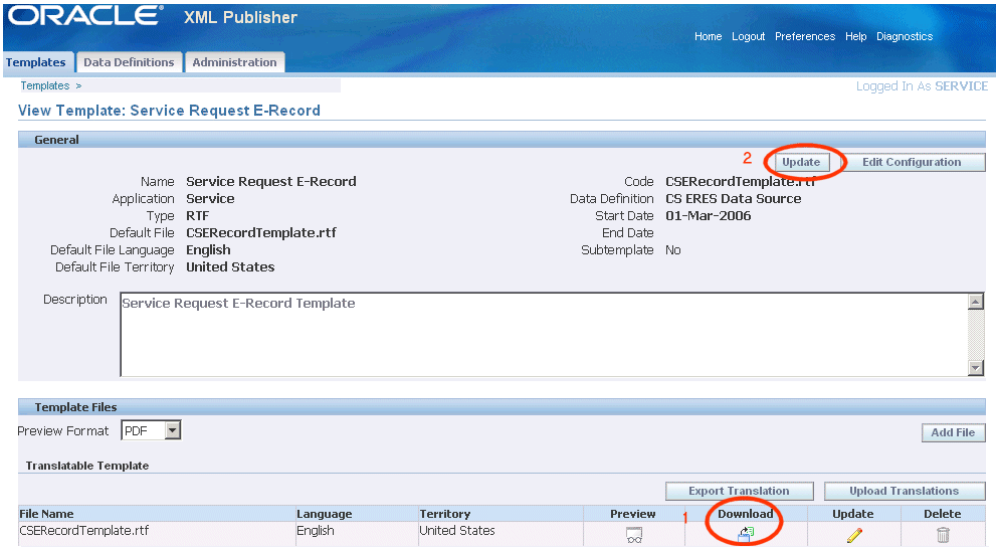
The XML Publisher Templates page appears.

2. To display the seeded template, search for "Service" in the Application field and " RTF" as the Type.

3. Click the "Service Request E-Record" link in the Name field.

   Note: Your application includes two other templates, which are used for service request reports.

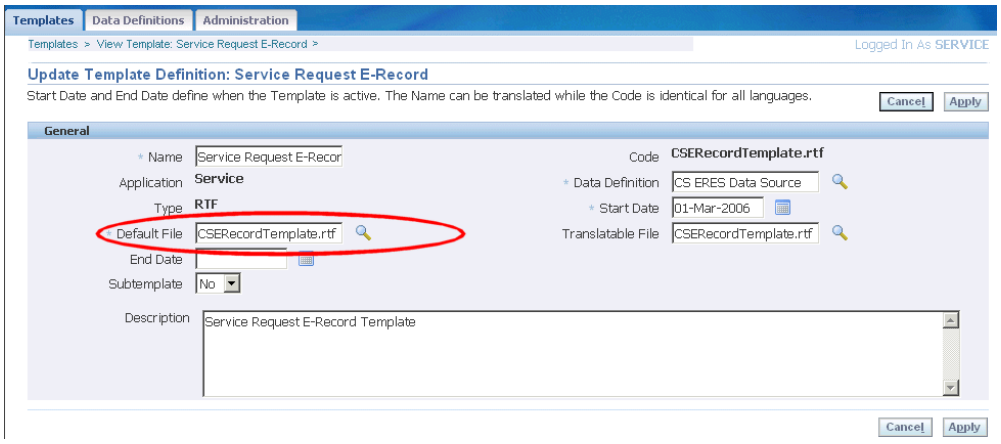
   The View Template: Service Request E-Record page appears.



4. To download the template for modification, click **Download**.

5. If you modify the seeded template, you must upload it under a different name and then make it the default.

   Click **Update** and enter the file name (Code) in the Default File field in the Update Template Definition page.



Specifying a Modified Template for Use by Oracle E-Records

You must set Oracle E-Record variables using this procedure to specify a modified e-record template you have uploaded to Oracle XML Publisher or if you want to capture e-signature without requiring approval.

Prerequisites:

You must first upload and register the template you want to use for capturing the e-record.

To set Oracle E-Record Variables:

1. Under the ERES Administrator responsibility, navigate to Administration Tasks, Setup.

   The Configuration Variables page opens in a browser window.

2. Using the Search field search for Service Request Approval.

3. Modify the values of the service request variables as shown in the table below:

Variable Name	Name	Description
EREC_REQUIRED	E-Record Required	You must set this variable to Y to capture e-records and e-signatures. A setting of N disables both e-records and e-signatures.

Variable Name	Name	Description
EREC_STYLE_SHEET	E-Record Style Sheet	Set this variable to the name of the e-record template you want to use. By default, the value is set to the seeded template CSERecordTemplate_en_US.rtf.
ESIG_REQUIRED	E-Signature Required	Set to Y (the default) if approvals are required. Set to N to capture the e-record only.

Viewing the Status of Approval Requests of All Service Requests

Agents can view the status of pending approvals for individual service requests by clicking the E-Records Detail link from their service request. However, you can use this procedure to view the status of approval processes for all service requests.

To view the status of approval requests:

1. Log in under the ERES Administrator responsibility.
2. Navigate to Evidence Store.

   The E-record Details page appears.
3. The event name to use for your search is: oracle.apps.cs.sr.ServiceRequestApproval.

About the E-Record Template

This section provides guidelines for modifying the predefined e-record template and lists all the service request related information in both the summary and detailed report.

Because the template includes logic to generate both the summary and detailed report and because it is tied to the service request type setup, Oracle suggests you keep modifications to a minimum.

You can:

- Delete fields from the template
- Change template name provided you register the new file with Oracle XML

Publisher or Oracle E-Records. See Downloading and Registering the E-Record Template, page 19-15.

- Alter layout or graphics
- Move or add fields

  You can add or move fields if they are from the same report. For example, you can move Incident Address, which displays only in the detailed report to another place in the detailed report, but you cannot add it to the summary report.

What you must not do:

- Move or add fields from the summary report to the detailed report or vice versa.
- Delete logic in the template

The sections below list the service request attributes displayed in the summary and the detailed reports and any additional attributes you can add. The sections correspond to the sections in the report itself.

Each table lists the service request attribute and its XML data element.

Detailed Report

This section lists the service request attributes and their XML data elements used for the detailed report.

Customer Information

The following table lists the service request customer attributes used by the detailed report. There are no additional customer attributes available for inclusion in the report.

Attribute	XML Data Element
Account	ACCOUNT_NUMBER
Name	CUSTOMER_NAME
Number	CUSTOMER_NUMBER
Type	CUSTOMER_TYPE

Contact Information

The following table lists the service request primary contact information displayed in the detailed report.

Attribute	XML Data Element
Email	CONTACT_EMAIL
Name (Concatenation of title, first, and last name)	CONTACT_NAME
Phone Number	CONTACT_PHONE_NUMBER
Phone Type	CONTACT_TELEPHONE_TYPE
Type	CONTACT_TYPE

Subject Information

The following table lists the service request problem information displayed in the detailed report. This appears under the heading, Subject.

Attribute	XML Data Element
Category	ITEM_CATEGORY
Incident Address	INCIDENT_ADDRESS
Item Description	PRODUCT_DESCRIPTION
Item Instance	INSTANCE_NUMBER
Item Number	PRODUCT
Problem Code	PROBLEM_CODE
Problem Summary	PROBLEM_SUMMARY
Resolution Code	RESOLUTION_CODE
Resolution Summary	RESOLUTION_SUMMARY
Serial Number	SERIAL_NUMBER

Service Request Information

The following table lists the service request information displayed in the detailed report under the heading, Request.

Attribute	XML Data Element
Escalation Level	ESCALATION_LEVEL
Group	SR_GROUP
Incident Date	INCIDENT_DATE
Owner	SR_OWNER
Owner Type	RESOURCE_TYPE
Reported Date	REPORTED_DATE
Resolve By Date	RESOLVE_BY_DATE
Resolved On Date	INCIDENT_RESOLVED_DATE
Respond By Date	RESPOND_BY_DATE
Responded On Date	INC_RESPONDED_BY_DATE
Severity	INCIDENT_SEVERITY
Status	INCIDENT_STATUS
Type	INCIDENT_TYPE
Urgency	INCIDENT_URGENCY

Contract Information

The following table lists the service contract information displayed in the detailed report under the heading, Contract.

Attribute	XML Data Element
Coverage (Name of coverage for the service line in the contract)	CONTRACT_COVERAGE
Number (Service Contract Number)	CONTRACT_NUMBER
Service (Name of service in contract line)	CONTRACT_SERVICE

Service Request Task Information

The following table lists the service request task information displayed in the detailed report under the heading, Task.

Attribute	XML Data Element
Actual Effort	TASK_ACTUAL_EFFORT
Actual End Date	TASK_ACTUAL_END_DATE
Actual Start Date	TASK_ACTUAL_START_DATE
Creation Date	TASK_CREATION_DATE
Description	TASK_DESCRIPTION
Duration	TASK_DURATION
Number	TASK_NUMBER
Owner	TASK_OWNER
Owner Type	TASK_OWNER_TYPE
Parent	TASK_PARENT_TASK_NUMBER

Attribute	XML Data Element
Planned Effort	TASK_PLANNED_EFFORT
Planned End Date	TASK_PLANNED_END_DATE
Planned Start Date	TASK_PLANNED_START_DATE
Priority	TASK_PRIORITY
Scheduled End Date	TASK_SCHEDULED_END_DATE
Scheduled Start Date	TASK_SCHEDULED_START_DATE
Status	TASK_STATUS
Subject	TASK_NAME
Type	TASK_TYPE
Unit of Measure for Actual Effort	TASK_ACTUAL_EFFORT_UOM
Unit of Measure for Duration	TASK_DURATION_UOM
Unit of Measure for Planned Effort	TASK_PLANNED_UOM

Notes Information

The following table lists the notes information displayed in the detailed report under the heading, Notes.

Attribute	XML Data Element
Created By	NOTE_CREATED_BY
Date Entered	NOTE_CREATION_DATE
Description	NOTE_DESCRIPTION
Detail	NOTE_DETAIL

Attribute	XML Data Element
Type	NOTE_TYPE
Visibility	NOTE_VISIBILITY

Related Service Requests Information

The following table lists information about related service requests displayed in the detailed report under the heading, Related Service Requests.

Attribute	XML Data Element
Number	RELATEDSR_NUMBER
Owner	RELATEDSR_OWNER
Relationship	RELATEDSR_NAME
Severity	RELATEDSR_SEVERITY
Status	RELATEDSR_STATUS
Summary	RELATEDSR_SUMMARY

Related Objects

The following table lists the related objects information displayed in the detailed report.

Attribute	XML Data Element
Description	RELATEDOB_DESCRIPTION
Number	RELATEDOB_NUMBER
Object	RELATEDOB_NAME

Internal Descriptive Flexfield

The Service Request Additional Information section of the XML reports lists the

information you enter in the descriptive flexfield located on the Workbench tab of the Service Request window.

If you have implemented the capture of additional service request information using this flexfield, you must modify the prompts in the report to correspond to the prompts in the flexfield. The prompts and the corresponding XML data elements are listed in the table below:

Prompt	Corresponding XML Data Element
Attribute 1 Prompt	ATTRIBUTE1
Attribute 2 Prompt	ATTRIBUTE2
Attribute 3 Prompt	ATTRIBUTE3
Attribute 4 Prompt	ATTRIBUTE4
Attribute 5 Prompt	ATTRIBUTE5
Attribute 6 Prompt	ATTRIBUTE6
Attribute 7 Prompt	ATTRIBUTE7
Attribute 8 Prompt	ATTRIBUTE8
Attribute 9 Prompt	ATTRIBUTE9
Attribute 10 Prompt	ATTRIBUTE10
Attribute 11 Prompt	ATTRIBUTE11
Attribute 12 Prompt	ATTRIBUTE12
Attribute 13 Prompt	ATTRIBUTE13
Attribute 14 Prompt	ATTRIBUTE14
Attribute 15 Prompt	ATTRIBUTE15
Context Prompt	INCIDENT_CONTEXT

External Descriptive Flexfield

The Service Request External Additional Information section of the report lists the information captured by the flexfield in the header of the Service Request window.

If you have implemented this flexfield, you must modify the attribute prompt in the report to correspond to the prompts in your flexfield. The table below lists the seeded prompts.

Prompt	Corresponding XML Data Element
Ext Attribute 1 Prompt	EXT_ATTRIBUTE1
Ext Attribute 2 Prompt	EXT_ATTRIBUTE2
Ext Attribute 3 Prompt	EXT_ATTRIBUTE3
Ext Attribute 4 Prompt	EXT_ATTRIBUTE4
Ext Attribute 5 Prompt	EXT_ATTRIBUTE5
Ext Attribute 6 Prompt	EXT_ATTRIBUTE6
Ext Attribute 7 Prompt	EXT_ATTRIBUTE7
Ext Attribute 8 Prompt	EXT_ATTRIBUTE8
Ext Attribute 9 Prompt	EXT_ATTRIBUTE9
Ext Attribute 10 Prompt	EXT_ATTRIBUTE10
Ext Attribute 11 Prompt	EXT_ATTRIBUTE11
Ext Attribute 12 Prompt	EXT_ATTRIBUTE12
Ext Attribute 13 Prompt	EXT_ATTRIBUTE13
Ext Attribute 14 Prompt	EXT_ATTRIBUTE14
Ext Attribute 15 Prompt	EXT_ATTRIBUTE15
Ext Context Prompt	EXT_CONTEXT

Service Request Extensible Attributes

The information in the following table is listed under the heading, Service Request Extensible Attributes.

Attribute	XML Data Element
Attribute Group Name	ATTR_GROUP_DISP_NAME
Attribute Value	ATTR_VALUE_DISPLAY
Attribute Group (Internal Name)	GROUP
Attribute Unit of Measure	ATTR_UNIT_OF_MEASURE

Additional Information Available for Use

You can add additional XML data elements listed in the table below to the detailed report:

XML Data Element	Attribute Description
ACCOUNT_ID	Application-Generated ID Number
ACTUAL_RESOLUTION_DATE	Resolved On Date
CLOSE_DATE	Date Request Was Closed
COMPONENT	Oracle Install Base or Inventory Component Number
COMPONENT_REVISION	Oracle Install Base or Inventory Component Revision Number
CONTACT_PARTY_ID	Application-Generated ID Number
CREATED_BY	Created by
CREATED_BY_ID	Application-Generated ID Number

XML Data Element	Attribute Description
CUSTOMER_EMAIL	Customer's Primary E-Mail Address
CUSTOMER_ID	Application-Generated ID Number
CUSTOMER_PHONE	Customer's Primary Phone Number
CUSTOMER_PRODUCT_ID	Application-Generated ID Number
INCIDENT_ID	Application-Generated ID Number
INCIDENT_SERVERITY_ID	Application-Generated ID Number
INCIDENT_STATUS_ID	Application-Generated ID Number
INCIDENT_TYPE_ID	Application-Generated ID Number
INCIDENT_URGENCY_ID	Application-Generated ID Number
INVENTORY_ORG_ID	Application-Generated ID Number
INVERTORY_ITEM_ID	Application-Generated ID Number
ITEM_REVISION	Oracle Install Base or Inventory Item Revision Number
LAST_UPDATE_DATE	Date of Last Service Request Update
ORGANIZATION_ID	Application-Generated ID Number
ORGANIZATION_ID	Application-Generated ID Number
PROBLEM_CODE_ID	Application-Generated ID Number
PUBLISH_FLAG	Publish Flag for the Service Request (This flag, which can have a value of Y or N, determines if customers can view the service request on their Oracle iSupport Web portal.)
RESOLUTION_CODE_ID	Application-Generated ID Number

XML Data Element	Attribute Description
SEV_IMPORTANCE_LEVEL	Severity Importance Level
SR_CREATION_CHANNEL	Service Request Creation Channel
SR_GROUP_ID	Application-Generated ID Number
SR_OWNER_ID	Application-Generated ID Number
STATUS_FLAG_CODE	Application-Generated ID Number
STATUS_SORT_ORDER	Application-Generated ID Number
SUB_COMPONENT	Oracle Install Base or Inventory Subcomponent Number
SUB_COMPONENT_REVISION	Oracle Install Base or Inventory Subcomponent Revision Number
SYSTEM_NUMBER	Oracle Install Base System Number
TAG_NUMBER	Oracle Install Base Tag Number
TIMEZONE_ID	Application-Generated ID Number
TIMEZONE_NAME	Contact's Time Zone (Contact time zone name from the CS schema.)

Summary Report

The tables in this section list the attributes captured by the summary e-record and their corresponding XML data elements.

Subject Information

The following table lists the service request problem information displayed in the summary report. This appears under the heading, Subject.

Attribute	XML Data Element
Problem Summary	PROBLEM_SUMMARY
Resolution Summary	RESOLUTION_SUMMARY

Service Request Information

The following table lists the service request information displayed in the summary report under the heading, Request.

Attribute	XML Data Element
Severity	INCIDENT_SEVERITY
Status	INCIDENT_STATUS
Type	INCIDENT_TYPE

Additional Information Available for Use

You can add additional XML data elements listed in the table below to the summary report:

Attribute	XML Data Element
Problem Code	PROBLEM_CODE
Resolution Code	RESOLUTION_CODE
Severity Importance Level	SEV_IMPORTANCE_LEVEL

Date and Time Displayed in Electronic Records

For all date fields in an electronic record, the application uses either the server time zone or the time zone selected by the application user (client time zone) depending on the setting of system profile Enable Timezone Conversions.

If Enable Timezone Conversions profile is set to Y, the application uses the user preferred time zone. If the profile is set to N, it uses the system time zone.

The following fields are affected:

- Reported Date
- Incident Date
- Respond By Date
- Resolve By Date
- Responded On Date
- Resolved On Date
- Task Creation Date
- Task Planned Start Date
- Task Planned End Date
- Task Scheduled Start Date
- Task Scheduled End Date
- Task Actual Start Date
- Task Actual End Date
- Note Creation Date

The application stamps the top of each electronic record with the time zone, the date, and the time the record was generated.

20

Enabling Service Request Reports

This chapter covers the following topics:

- Overview of Service Request Reports
- Modifying the Service Request Report
- Specifying the Data Definition for User Reports
- Predefined Data Definition Contents

Overview of Service Request Reports

You can print the contents of service requests and cases, and generate a profit margin report for each service request, in HTML, PDF, RTF, and XSL formats via an integration with Oracle XML Publisher.

Your application comes with three data definitions ready for use for a service request: a detail report, a summary report, and a profit margin report. Each data definition comes with its own template for an English language report as listed in the table below:

Data Definition	Corresponding Template	Template Description
Service Request Detail Definition (CS_SR_DETAIL_DEF)	Service Request Detail Report Template (CS_SR_DETAIL_TMP_en)	Includes all available service request attributes including charges, the two descriptive flexfields, and extensible attributes.
Service Request Summary Definition (CS_SR_SUMMARY_DEF)	Service Request Summary Report Template (CS_SR_SUMMARY_TMP_en)	Includes a subset of the detailed report attributes including the same charges information as the detailed report.

Data Definition	Corresponding Template	Template Description
Profit Margin Data Definition (CS_COST_DEF)	Profit Margin Report Template (CS_COST_TMP_en)	Includes all cost and charges details for a particular service request.

You can modify the predefined templates to change the look of the template or add text, using the Oracle XML Publisher Template Builder, a Microsoft Word macro or any text tool.

You cannot modify the predefined templates but you can modify copies and specify an end date for the template in Oracle XML Publisher's Template Manager.

Using personalization, you can set up the application to enable users to print based on templates created based on either the detailed data definition or the summary data definition. (By default, the application enables the detailed data definition).

To create a custom template:

1. Under the XML Publisher Administrator responsibility, navigate to Templates. The Templates page appears.
2. Search for the required template.
3. Click the Duplicate icon. The Copy Template page appears. Click Apply.
4. From the View Template page, click Download to download the RTF template and save it to your local machine. Modify the RTF template as required.
5. Click the Update icon and the Update File page appears. Click Browse to select the updated RTF file from your local machine. Click Apply to update the template definition with the new RTF file.

Setting Up the Profit Margin Report

1. By default the Profit Margin Report is enabled from the Service Request Form and Update Service Request page (HTML).
2. Add the function Access Profit Margin Report Special Menu Item to the responsibility menu.

   Note: This step is optional. It is required only if the user has a new menu.

3. Ensure that the action item for the Profit Margin Report is enabled in the lookup

CSZ_GLOBAL_ACTIONS to access the report from the Update Service Request Page (HTML). This setup is done by default.

Modifying the Service Request Report

Use this general procedure to modify the service request report.

Prerequisites:

You must have Oracle XML Publisher implemented.

To modify service request reports:

1. Search and display the "Service" template in XML Publisher Home page.

   The Home page displays all of the templates available for Service: both the detail and the summary templates as well as the Service Request E-Record template, a template for capturing complete service request records.

2. Select the Service Request Summary link.

   The View Template: Service Request Summary page appears.

3. Click Download for the CS_SR_SUMMARY_TMP.rtf file.

4. Save it to a folder on your hard disk. Modify the Template in Microsoft Word with Oracle XML Publisher Template Builder

5. Open the RTF file in Microsoft Word with Oracle XML Publisher Template Builder.

6. To modify the header, choose Header and Footer from the View menu.

7. Enter text of your choice in the header. For example: "Please note that this report is for information only and does not imply any contractual commitments on the part of Vision Corporation."

8. Close the header and save your document as CS_SR_SUMMARY_TMP_X.rtf

9. On the Oracle XML Publisher Home page, search for the Service application templates again.

10. Click the Duplicate icon for the Service Request Summary template.

11. In the Copy Template tabbed page, enter "CS_SR_SUMMARY_TMP_X" as the code and "ABC Service Request Summary" as the template name. Agents will select the name for generating the report.

12. Click Apply. The application opens the View Template page with the copied template information.

13. Click Add File.

14. Browse for and enter the modified template file.

15. Enter "English" in the Language field.

16. Click Apply. The application returns you to the View Template page.

17. Click Update. Enter the name of your file in the Default File field. This makes the new file you uploaded as the default file for your template.

18. Click Apply.

Specifying the Data Definition for User Reports

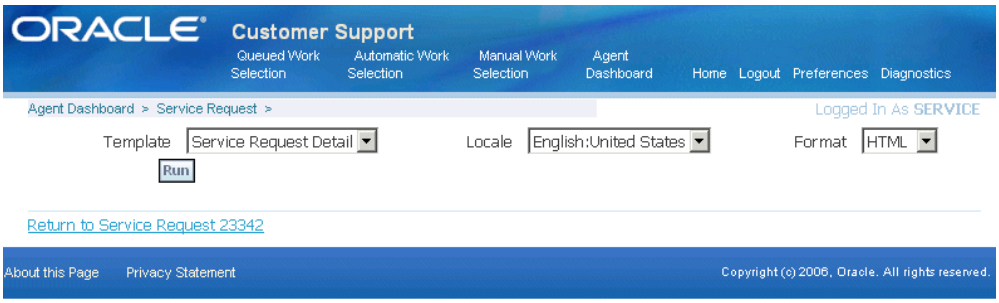
The list of reports users have available for printing service requests is based on the data definition you specify for the XML Publisher page where users make their selection. By default, this page is set to the detailed data definition (CS_SR_DETAIL_DEF), so users can choose reports based on that definition. Use this procedure to specify the summary data definition.

To specify a different data definition:

1. Display any service request in the application you are using.

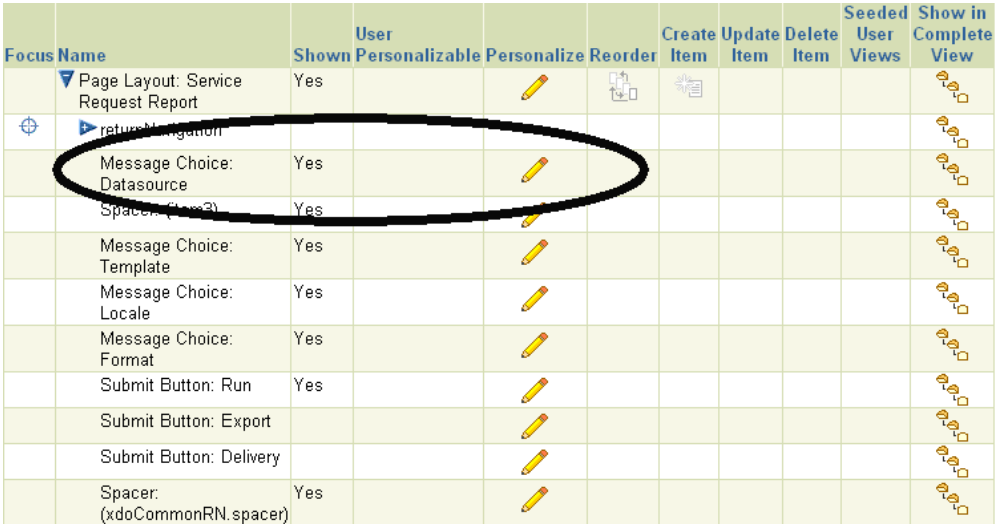
2. Navigate to the page where you select the report template. In HTML based applications (Case Management, Customer Support, and Service Desk), select Generate Report from the Action list and click **Go**. In Oracle TeleService's Service Request window, choose **Print Request** from the Tools1 menu.

   The template selection page appears.



3. Select the Personalize Page link at the top of the page.

4. Edit the Message Choice: Datasource field by clicking **Personalize**.



5. Enter the data definition you want to use in the Initial Value field at the desired personalization level. For example, CS_SR_SUMMARY_DEF for the seeded summary data definition.

6. Click **Apply**.

Predefined Data Definition Contents

This section lists the service request information included in the three seeded data definitions. Each table specifies whether an attribute is available in the detailed data definition (CS_SR_DETAIL_DEF), summary data definition (CS_SR_SUMMARY_DEF), or the profit margin data definition (CS_COST_DEF).

The predefined templates for Service Request Detail and Service Request Summary reports include most of the attributes in their respective data definitions. The detailed template includes all. The summary template includes all but the following:

- Extensible Attributes
- Internal Flexfield
- External Flexfield

Customer Information

The following table lists the customer-related parameters:

Attribute	Detailed Definition	Summary Definition
Account	Yes	Yes (hidden)
Account ID (Application-generated ID included but not displayed by default)	Yes	Yes
Customer ID (Application-generated ID included but not displayed by default)	Yes	Yes (hidden)
Customer Number	Yes	Yes
Name	Yes	Yes
Type	Yes	Yes

Contact Information

The following table lists the contact related parameters:

Attribute	Detailed Definition	Summary Definition
E-mail	Yes	Yes
Name	Yes	Yes
Phone	Yes	Yes
Type	Yes	Yes

Service Request Subject

This information pertains to the subject of the service request.

Attribute	Detailed Definition	Summary Definition
Category	Yes	Yes
Component	Yes	No
Component Revision	Yes	No
Incident Address	Yes	Yes
Item	Yes	Yes
Item Desc	Yes	Yes
Item Instance	Yes	Yes
Item Revision	Yes	No
Problem Code	Yes	No
Problem Summary	Yes	No
Resolution Code	Yes	No
Resolution Summary	Yes	No
Serial Number	Yes	Yes
Sub-Component	Yes	No
Sub-Component Revision	Yes	No
System Number	Yes	No
Tag Number	Yes	No

Service Request Information

The following table lists the service request related parameters:

Attribute	Detailed Definition	Summary Definition
Agent Time Zone	Yes	Yes
Contact Respond By	Yes	Yes
Contact Responded On	Yes	Yes
Contact Resolve By	Yes	Yes
Contact Resolved On	Yes	Yes
Contact Time Zone	Yes	Yes
Created By	Yes	Yes (hidden)
Group	Yes	Yes
Incident Date	Yes	Yes
Incident Respond By	Yes	Yes
Incident Responded On	Yes	Yes
Incident Resolve By	Yes	Yes
Incident Resolved On	Yes	Yes
Incident Time Zone	Yes	Yes
Owner	Yes	Yes
Owner Type	Yes	Yes
Reported Date	Yes	Yes
Resolve By Date	Yes	Yes
Resolved On Date	Yes	Yes
Respond By Date	Yes	Yes

Attribute	Detailed Definition	Summary Definition
Responded On Date	Yes	Yes
Severity	Yes	Yes
Status	Yes	Yes
Type	Yes	Yes

Contract

This information relates to the contract selected for the service request.

Attribute	Detailed Definition	Summary Definition
Coverage	Yes	Yes
Number	Yes	Yes
Service	Yes	Yes

Associated Parties

Associated parties are used only in Case Management. If a service request includes multiple contacts and contact points they are displayed in this section.

Attribute	Detailed Definition	Summary Definition
Contact	Yes	No
Contact By	Yes	No
Party Name	Yes	No
Party Role	Yes	No
Party Type	Yes	No

Service Request Tasks

The following table lists tasks related attributes:

Attribute	Detailed Definition	Summary Definition
Date	Yes	No
Description	Yes	No
Number	Yes	No
Owner	Yes	No
Priority	Yes	No
Status	Yes	No
Subject	Yes	No
Type	Yes	No

Linked Solutions

The following table lists Oracle Knowledge Management related attributes:

Attribute	Detailed Definition	Summary Definition
Solution Number	Yes	No
Title	Yes	No
Updated Date	Yes	No

Notes

The following table lists notes related attributes:

Attribute	Detailed Definition	Summary Definition
Created By	Yes	No
Date Entered	Yes	No
Description	Yes	No
Detail	Yes	No
Type	Yes	No
Visibility	Yes	No

Audit Information

Your application automatically records changes to important fields, including the original and changed value, person who made the change, and the date the change was made. The data definition includes audit information on the following fields:

- Group Owner
- Owner
- Resolution Date
- Resource Type (Owner Type)
- Severity
- Status
- Type
- Urgency

The information listed in the following table appears in the report for each of the audit fields:

Attribute	Detailed Definition	Summary Definition
Audit Field	Yes	No

Attribute	Detailed Definition	Summary Definition
Name	Yes	No
New Value	Yes	No
Old Value	Yes	No
Update Date	Yes	No
User Name	Yes	No

Interaction History

The application automatically tracks the agent interactions with the customer in Interaction History. The following interaction attributes are available for the report.

Attribute	Detailed Definition	Summary Definition
Agent	Yes	No
Interaction ID	Yes	No
Outcome	Yes	No
Reason	Yes	No
Result	Yes	No
Start Date	Yes	No

Related Service Requests

Agents can add links to related service requests and specify the relationship. The following information is available for the reports:

Attribute	Detailed Definition	Summary Definition
Number	Yes	No

Attribute	Detailed Definition	Summary Definition
Owner	Yes	No
Relationship	Yes	No
Severity	Yes	No
Status	Yes	No
Summary	Yes	No

Related Objects

Agents can link a service request to another Oracle E-Business Suite object. The following information is available in the reports:

Attribute	Detailed Definition	Summary Definition
Description	Yes	No
Number	Yes	No
Object	Yes	No

Internal Descriptive Flexfield

The detailed data definition includes information from the descriptive flexfield located on the Workbench tab of the Service Request window. The seeded template based on this definition omits it. If you have implemented the capture of additional service request information using this flexfield, you must add this information to your template and modify the prompts to correspond to the prompts in the flexfield.

ATTRIBUTE1	Detailed Definition	Summary Definition
ATTRIBUTE2	Yes	No
ATTRIBUTE3	Yes	No

ATTRIBUTE1	Detailed Definition	Summary Definition
ATTRIBUTE4	Yes	No
ATTRIBUTE5	Yes	No
ATTRIBUTE6	Yes	No
ATTRIBUTE7	Yes	No
ATTRIBUTE8	Yes	No
ATTRIBUTE9	Yes	No
ATTRIBUTE10	Yes	No
ATTRIBUTE11	Yes	No
ATTRIBUTE12	Yes	No
ATTRIBUTE13	Yes	No
ATTRIBUTE14	Yes	No
ATTRIBUTE15	Yes	No
INCIDENT_CONTEXT	Yes	No

External Descriptive Flexfield

The detailed data definition includes information from the descriptive flexfield located on the header of the Service Request window. The predefined template based on this definition omits it. If you have implemented capturing of additional information using this flexfield, you must add this information to your template and modify the prompts to correspond to the prompts in the flexfield.

Attribute	Detailed Definition	Summary Definition
EXT_ATTRIBUTE1	Yes	No

Attribute	Detailed Definition	Summary Definition
EXT_ATTRIBUTE2	Yes	No
EXT_ATTRIBUTE3	Yes	No
EXT_ATTRIBUTE4	Yes	No
EXT_ATTRIBUTE5	Yes	No
EXT_ATTRIBUTE6	Yes	No
EXT_ATTRIBUTE7	Yes	No
EXT_ATTRIBUTE8	Yes	No
EXT_ATTRIBUTE9	Yes	No
EXT_ATTRIBUTE10	Yes	No
EXT_ATTRIBUTE11	Yes	No
EXT_ATTRIBUTE12	Yes	No
EXT_ATTRIBUTE13	Yes	No
EXT_ATTRIBUTE14	Yes	No
EXT_ATTRIBUTE15	Yes	No
EXT_CONTEXT	Yes	No

Service Request Extensible Attributes

Service request extensible attributes are included in the detailed data definition but not in the predefined template as described in the table below:

Attribute	Detailed Definition	Summary Definition
ATTR_GROUP_DISP_NAME	Yes	No

Attribute	Detailed Definition	Summary Definition
ATTR_UNIT_OF_MEASURE	Yes	No
ATTR_VALUE_DISPLAY	Yes	No
GROUP	Yes	No

Charges Information

The following charges information appears in both the summary and detailed data definitions and reports:

Estimated Charges

The estimated charges in the following table are included:

Attribute	Detailed Definition	Summary Definition
Currency Code	Yes	Yes
Extended Price	Yes	Yes
Item	Yes	Yes
Item Description	Yes	Yes
Net Price	Yes	Yes
Quantity	Yes	Yes
Service Activity	Yes	Yes
Unit Price	Yes	Yes
UOM	Yes	Yes

Submitted Charges

The submitted charges listed in the table below are included:

Attribute	Detailed Definition	Summary Definition
Currency Code	Yes	Yes
Extended Price	Yes	Yes
Item	Yes	Yes
Item Description	Yes	Yes
Net Price	Yes	Yes
Quantity	Yes	Yes
Service Activity	Yes	Yes
Unit Price	Yes	Yes
UOM	Yes	Yes

Unsubmitted Charges

The unsubmitted charges in the following table are included:

Attribute	Detailed Definition	Summary Definition
Currency Code	Yes	Yes
Extended Price	Yes	Yes
Item	Yes	Yes
Item Description	Yes	Yes
Net Price	Yes	Yes
Quantity	Yes	Yes
Service Activity	Yes	Yes
Unit Price	Yes	Yes

Attribute	Detailed Definition	Summary Definition
UOM	Yes	Yes

Profit Margin Information

The Profit Margin Report displays the following regions: Customer Information, Service Request Information, Summary Information, and Transaction Details.

Customer Information

The customer related information is as follows:

- Customer Type
- Customer Name
- Customer Number
- Account Number
- Contact Type
- Contact Name
- Contact Phone Number
- Contact Email

Service Request Information

The service request related information is as follows:

- Incident Number
- Incident ID
- Problem Summary
- Problem Code
- Resolution Code
- Resolution Summary
- Reported Date

- Resolve By
- Incident Occurred Date
- Request Type
- Request Status
- Request Urgency
- Request Severity
- Request Importance Level
- Service Request Group
- Service Request Owner
- Product
- Product Description
- Serial Number
- Operating Unit
- Expenditure Organization
- Project Number
- Project Name
- Project Task Number
- Project Task Name

Summary Information

The summary of the revenues, cost and profit by billing type displayed is as follows:

- Material Revenue
- Labor Revenue
- Expense Revenue
- Total Revenue
- Material Cost

- Labor Cost
- Expense Cost
- Total Costs
- Material Profit
- Labor Profit
- Expense Profit
- Total Profit
- Material Profit%
- Labor Profit%
- Expense Profit%
- Total Profit%

Transaction Details

The transactions (costs, debrief, repair orders, charges) displayed for a service request are as follows:

- Billing Type
- Currency Code
- Operating Unit
- Estimate Detail ID
- Line Number
- Charge Creation Date
- Cost ID
- Transaction Type ID
- Service Activity Code
- Business Process Name
- Business Process ID

- Item
- Item Description
- Quantity
- UOM
- List Price
- Override Unit Price
- Extended Price
- Contract Discount Amount
- Net Charges

Repair Order Information

- Item
- Serial Number
- Repair Order Number
- Repair Type

Debrief Information

- Quantity
- Item

Cost

- Unit Cost
- Extended Cost

Profit

- Profit Margin
- Profit Margin%

21

Setting Up Notifications

This chapter covers the following topics:

- Notification Overview
- About When and Whom You Can Notify
- Setting Up Notifications
- Notification Post-Install Steps
- Specifying the "From:" Field in the Message
- About Predefined Notification Templates
- Available Tokens
- Displaying Existing Notification Rules
- Creating a New Notification Rule
- Updating Existing Notification Rules

Notification Overview

You can keep interested parties, including customers and agents, informed of any service request or case updates via an Oracle Workflow process ,included with your application.

The Customer Support Event Process automatically sends out a notification whenever a certain event occurs, for example, when a service request or case is created, set to a specific status, or reassigned to another agent.

> **Note:** There is a separate notification process for electronic signatures (e-signatures). For details, see Electronic Approvals and Records, page 19-1.

The subject and text of the notification message are stored in a Oracle Workflow message template. You can create your own notification message templates or you can

modify those provided with the application according to Oracle Workflow documentation.

The topics in this chapter explain how to set up the rules that trigger the notifications, choose and modify the notification templates, and specify the recipients.

Both service applications and Case Management share the same setup steps and seeded templates. For Case Management, please read "case" for every mention of "service request". For the predefined templates, you must change thise wording in the message text itself.

You can inform agents about the notification rules you set up, so that they are aware what information the application sends when.

The application record that a notification has been sent in the Interaction History of the service request. The notification appears as an activity, for example, "Email Sent to Customer Contact by Automated Process." (The reason and outcome for this activity are the defaults you set in creating wrap-ups.)

Unlike e-mails sent regarding the service request, agents cannot review the notification text itself.

Depending on the notification rule, agents can receive copies of the notifications if they are the service request owner or a contact.

Using Customer Support, Case Management, and Service Desk, agents can view notifications from the Workflow Notifications page, accessible via a link from the Dashboard. (For Forms-based windows, users can view notifications by navigating to Service Requests, Workflow Notifications instead.)

Agents can request to have the notifications sent to them via e-mail instead by changing their Notifications E-Mail Style Preferences. (To change the preferences, select the Preferences link at the top right hand side of the page and navigate to General Preferences, and then Display Preferences).

Alternately, you can set up e-mail as the preferred method of delivery by changing the Notification Mailer setup in Oracle Workflow.

For employees to receive notifications via e-mail, the e-mail addresses must be entered in the employees' Oracle HRMS records.

Customers and contacts, who cannot log in to an Oracle E-Business Suite application, can be notified by e-mail only. Agents must make sure customer contact records include e-mail addresses. The application does not generate any errors for missing or invalid e-mail addresses.

> **Note:** The notification process does not permit you to receive or view any replies to the notifications. For this reason, Oracle recommends that you include a message in the notification body reminding customers that they cannot reply to the e-mail.

A predefined notification rule is set up where if a service request or a case status

changes to closed, the rule notifies the primary contact of any related service requests or cases. You must set up other rules yourself.

Topics covered in this section include:

- Notification Template Types, page 21-3
- Restrictions for the Notification Process, page 21-15
- About When and Whom You Can Notify, page 21-6
- Setting Up Notifications Process Overview, page 21-14

Notification Template Types

The application includes two types of templates for notifications:

- Text templates
- Preconfigured HTML notification templates

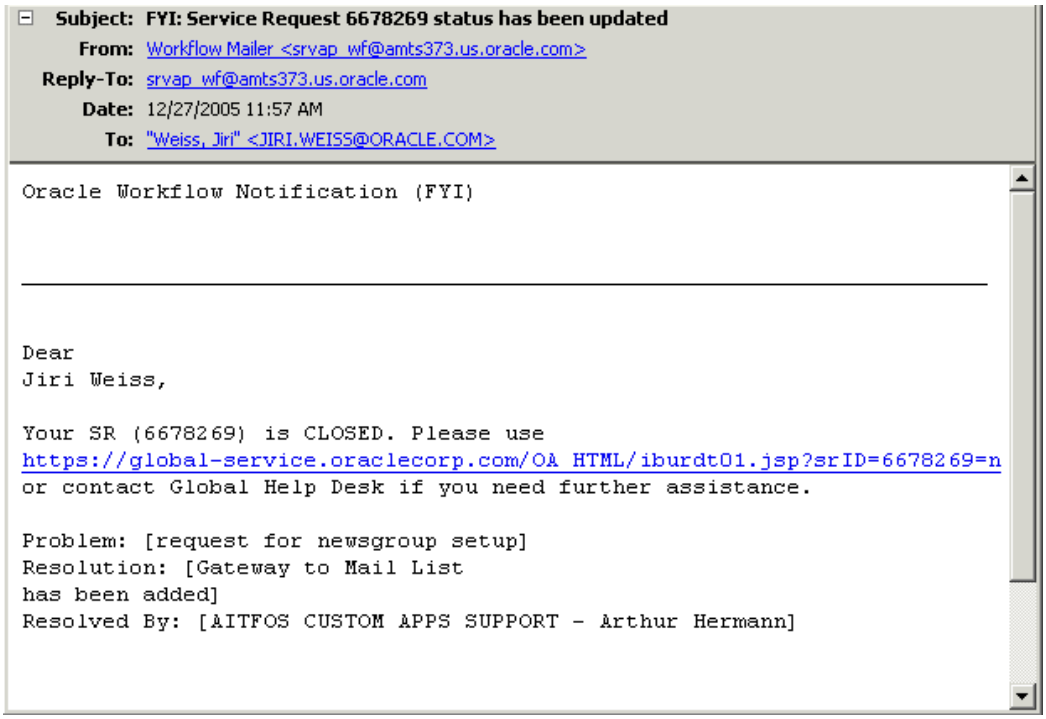
Text Templates

The predefined text templates generate a plain text message that the recipient can view either through their workflow notifications or e-mail Inbox. Merge fields provide service request-specific information such as customer name, service request number, and problem summary.

Although you can add HTML markup to these templates, the information about the service request is limited to that available through the merge fields. For example, you cannot include notes that the agents have entered into the service request.

Recipients who want to view the full contents of the service request must follow a link. For customers, this means logging into their Oracle iSupport Web portal.

Here is a sample text notification:



Preconfigured HTML Notifications for Service Request Contacts

This type of predefined template is available for notifications to service request contacts via e-mail only. It delivers a complete HTML report of the service request as the customer contact would see it on their self-service Oracle iSupport Web portal. This means that it is unnecessary for the recipient to log onto the portal itself.

You can customize the look of these notifications through corporate branding (to replace the Oracle logo, for example) and you can use Oracle Workflow Builder to change the text of the notification, including merge fields. To modify the service request content itself, however, you must use Oracle iSupport configuration features according to the procedures outlined in the *Oracle iSupport Implementation and Administration Guide* . You do not require an Oracle iSupport license to do so.

Here is a partial view of a sample notification e-mail generated with the seeded iSupport notification template:

From: Workflow Mailer [mailto:WF-c12x1rw.emswf.com.emcmail@ap6001oes.us.oracle.com]
Sent: Wednesday, February 22, 2006 3:27 PM
To: Francis Chang
Subject: FYI: Service Request 116842 Created.

Time Zone **(GMT -08:00/-07:00) Pacific Time**

From	**Smith, Rick**
To	**Francis Chang**
Sent	**22-FEB-2006 15:25:54**
ID	**3462457**

ORACLE iSupport

Service Request 116842 has been created. You are receiving this notification because you have been listed as a contact on this service request.

Service Request: 116842 - Demo HTML Notification

Request Number **116842**
Problem Summary **Demo HTML Notification**

Customer

Customer **Business World** Account Number
Contact **Francis Chang** Contact By **E-mail-francis.chang@oracle.com**

General Information

Status **Open** Request Type **Customer Call**
Urgency **Respond - 24** Problem Type

Product

Product **AS18947** Version
Serial Number **SN100010**

Attachments

Attachment	Category	Description
There are no attachments associated with the Service Request.		

Progress

Date	Updated By
22-FEB-2006 15:24:08	Chang, Mr. Francis
Service request updated	
22-FEB-2006 15:24:05	Chang, Mr. Francis
A sample note to describe the problem.	
22-FEB-2006 15:24:05	Chang, Mr. Francis
Service request created	

Contacts

Contact	Contact By	Primary	Type
Francis Chang	E-mail-francis.chang@oracle.com	Yes	Customer

Incident Address

Address **2391 L STREET101** City **SAN JOSE**
State **CA** Province
Postal Code **95106** Country **US**

Bill To

Customer **Business World** Account
Contact Address **2391 L STREET101, SAN JOSE, CA, 95106, US**

Ship To

Customer **Business World** Account
Contact Address **2391 L STREET101, SAN JOSE, CA, 95106, US**

Installed At

Customer **Business World** Address **2391 L STREET101, SAN JOSE, CA, 95106, US**

Restrictions for the Notification Process

The following restrictions apply:

- You can only notify individual service request owners (not group owners).
- Service request owners are not notified if they have taken the action that triggered the notification. For example, a service request owner who is being notified every time a service request is being updated receives notifications only when others update the service request.
- For e-mail notifications, the customer contact or associated party record must contain an e-mail address. Employees must have their e-mail address entered in their Oracle HRMS application records
- Recipients cannot reply to the notification e-mails.
- Notifications based on preconfigured HTML templates can only be used to notify contacts listed on the service request (not agents, or associated parties).

About When and Whom You Can Notify

This section explains the different events that trigger notifications and the individuals you can notify for each event. The list of events is slightly different for Oracle Service applications and Case Management, so these are covered in separate sections:

- Events that Trigger Notifications for Service Modules, page 21-6
- Notifications for Case Management, page 21-10

Events that Trigger Notifications for Service Modules

The table below describes the events that can trigger a notification message for Oracle Service modules (Contact Center, Service Request, Customer Support, and Service Desk) and whom you can notify for each.

Event	Description	Whom you can notify	Explanation
Contact Added to Service Request	An agent or customer adds a contact to a service request. A contact can be either a customer contact or an employee.	• All active contacts associated with the service request • The new contact • The service request owner • The primary contact	The application sends out notifications when an agent or a customer adds a contact to the service request. The notifications are sent to contacts who have an active e-mail contact point on the service request.
Published Solution Added to Service Request	An agent or a customer has linked a published knowledge management solution to the service request.	• All active contacts • Only the primary contact	The application sends out notifications whenever an agent or customer links a knowledge management solution to a service request. You can use this message to e-mail suggested fixes to customers. The notifications are sent to contacts who have an active e-mail contact point on the service request.

Event	Description	Whom you can notify	Explanation
Relationship Created	An agent creates a relationship between service requests.	• Service request owner	Agents can specify different relationships between service requests. For example, they can specify service request A is a duplicate of service request B or caused by the problem described in the service request B. You can specify the relationship that will trigger the notification. See Setting up Service Request Relationships, page 8-1 for more details.
Relationship Removed	An agent removes a relationship in a service request.	• Service request owner	You can notify the owner of the service request if another agent has removed a previously established relationship between two service requests. You must specify the relationship you wish to trigger the notification. The notifications are sent to contacts who have an active e-mail contact point on the service request.

Event	Description	Whom you can notify	Explanation
Service Request Created	A service request is created.	• All contacts • Only the primary contact • The service request owner	The application sends out a notification whenever an agent or customer creates a service request. The notifications are sent to contacts who have an active e-mail contact point on the service request.
Service Request Owner Changed	An agent or concurrent program has assigned a new owner or removed an old owner.	• Old owner of the service request • New owner of the service request	You can notify new owner that a service request has been assigned to them and that the old owner is no longer assigned.
Service Request Status Changed	An agent or a customer changes the service request status.	• The service request owner • All service request contacts • Only the primary contact • All contacts in related service requests • Only the primary contacts in the related service requests • Owners of all related service requests.	The application sends out notifications to active contacts whenever the service request status is changed. For example, to notify all contacts whenever a service request is closed, you can trigger a message whenever the service request is changed to "Closed".

Event	Description	Whom you can notify	Explanation
Service Request Updated	An agent or customer updates the service request.	• Service request owner	You can notify the owner whenever someone else updates the service request. The notifications are sent to contacts who have an active e-mail contact point on the service request.

Notifications for Case Management

Case Management permits you to send notifications to associated parties and contacts.

Whether a notification is sent to the contacts depends on the customer fields displayed as per your Case Management implementation. Social service agencies who provide service to the public must use customer fields to track information about their clients; investigative agencies do not.

Associated parties to a case are any individuals with a relationship to the case, for example, lawyers, judges, and case workers. Contacts are a special type of associated party because they must either be employees or have an existing relationship with the customer:

- If the case customer is a person (for example, Andre Beaulie), the contacts must be person parties related to the customer (for example, Mary Beaulie - Spouse of - Andre Beaulie).

- If the case customer is an organization (for example, Business World), the contacts must be relationship parties related to the customer party in the Trading Community Architecture (TCA) party model (for example, Andre Beaulie - Employee of - Business World).

For this reason, you may want to send notifications to contacts only if you are exposing customers functionality in your application.

> **Note:** Although associated parties include contacts, the associated party and contact notifications are mutually exclusive. If you are notifying associated parties, the application does not notify those associated parties who are contacts.

The table below describes the notifications you can send for each event. Note that the

event name used here is the one used in the user interface and uses the service request terminology.

For associated parties, you can choose either to notify all parties with a particular party role, for example, all the lawyers on the case, or all parties belonging to a party role group. A party role group is a grouping of party roles. The legal role group may contain lawyers, judges, legal assistants, and clerks, for example.

Event	Description	Whom you can notify	Explanation
Associated Party Added	When an agent associates a party to the case.	• Parties (roles or role groups) associated with the case • Only the party that has just been associated • The case owner	The application sends out notifications when a user associates a new party to the case. For example, you can notify all the lawyers that a new suspect has been added.
Contact Added to Service Request	An agent associates a party to the case with the relationship of " Contact".	• All contacts associated with the service request • The new contact • The case owner • The primary contact	The application sends out notifications when an agent associates contact to the case.
Published Solution Added to Service Request	An agent has linked a published knowledge management article to the case.	• All contacts • Only the primary contact • Parties (roles or role groups) associated to the case	The application sends out notifications whenever an agent links a knowledge management article to the case.

Event	Description	Whom you can notify	Explanation
Relationship Created	An agent creates a relationship to another case.	• Case owner	Agents can specify different relationships between cases. for example, that Case A is a duplicate of Case B or that Case A is caused by B. You must specify the relationship that triggers the notification. See Setting up Service Request Relationships, page 8-1 for more details.
Relationship Removed	An agent removes a relationship.	• Case owner	You can notify the case owner when another user has removed a relationship between two cases. You must specify the relationships that triggers the notification.
Service Request Created	An agent creates a case.	• All contacts • Primary contact • The case owner • Parties (roles or role groups) associated with the case	The application sends out a notification on service request or case creation.

Event	Description	Whom you can notify	Explanation
Service Request Owner Changed	An agent or concurrent program has assigned a new owner for the case or removed an old owner.	• Old case owner • New case owner	You can notify new owners that cases have been assigned to them and former owners that cases are no longer assigned to them.
Service Request Status Changed	An agent changes the case status.	• The case owner • All case contacts • Only the primary contact • Owners of all related cases • Parties (roles or role groups) associated with the case • Parties (roles or role groups) associated in related cases. • All contacts of related cases • All primary contacts of related cases	The application sends out notifications whenever a case is changed to or from a status. For example, you may want to send out the notification when the status changes from any status to "Closed" .
Service Request Updated	An agent updates the case.	• Case owner	You can notify the case owner whenever someone else updates the case.

Setting Up Notifications

Use this general procedure to guide you through the set up of notifications. Follow the references in steps to learn more.

Prerequisites:

- Basic knowledge of Oracle Workflow Builder. Login to connect to your database.
- If you plan to notify employees by e-mail, then ensure that employees' addresses are entered in Oracle HRMS.

To set up notifications:

1. Create or modify the message templates using Oracle Workflow Builder according to the following guidelines:
   - All predefined message templates are defined in the Oracle Workflow item type Service Request (Internal Name: SERVEREQ).
   - The message body can be up to 1376 characters in length.
   - To supply service request information, you can use any of the tokens listed in Available Tokens, page 21-21.
   - The internal names of any templates based on the preconfigured HTML notification templates must start with "CS_SR_IBU_EVT".

     Those based on the predefined text templates must start with "CS_SR_EVT".
   - You can enter HTML markup into any template. To modify the way the service request information displays in templates is derived from the preconfigured HTML notification templates. However, you must use Oracle iSupport to make the modifications.
   - If you are implementing Case Management, you must change the service request-specific language in the predefined messages to refer to cases instead.
2. Optionally, remove unnecessary lines from the notifications using Oracle Workflow Builder. These are introduced by the workflow process. For details, see Notification Post-Install Steps, page 21-15.
3. Set up the rules that trigger the notifications. For setup details, see Creating a New Notification Rule, page 21-24.

Notification Post-Install Steps

This procedure explains how to remove unnecessary lines in the body of e-mail notification messages using Oracle Workflow Builder.

By default, all e-mail notification templates contain the following two unnecessary lines in the body of the message:

- `Oracle Workflow Notification (FYI)`
- `From`

To remove unnecessary e-mail notification lines:

1. Open the "System: Mailer" item type.
2. Open the "Workflow Open FYI Mail" (internal name: OPEN_MAIL_FYI) message.
3. Select the Body tab.
4. Delete the first two lines and save the message.

Specifying the "From:" Field in the Message

The From field in the notification message body is set to the value of the profile Service: Default System Resource. If the profile value is null, the following text appears in the From field: "Automated Service Request System".

About Predefined Notification Templates

Oracle provides two types of templates: text and preconfigured HTML. See Notification Template Types, page 21-3 for an explanation of the difference. The rest of this topic lists the seeded templates.

Text Notification Templates

This table lists the text templates provided with your application. Please use Oracle Workflow Builder to view the body text and other details of each seeded template:

Template Name	Description
Notify Contact: Service Request Created Message	Notifies a contact that they have been listed as a contact in a service request.

Template Name	Description
Notify Contact: Service Request Status Updated Message	Notifies an agent that a service request status has been updated.
Notify New Owner: Service Request Reassigned Message	Notifies an agent that they have been assigned as the new owner of a service request.
Notify Old Owner: Service Request Reassigned Message	Notifies an agent that ownership of the service request has been reassigned to someone else.
Notify Owner: Service Request Created Message	Notifies an agent that a service request was created with them as the owner.
Notify Owner: Service Request Status Updated Message	Notifies the recipient that the service request status was updated.
Notify Primary Contact: Service Request Created Message	Notifies the recipient that a service request has been created with them listed as a primary contact.
Notify: Published Solution Added to Service Request Message	Notifies recipient that a knowledge base solution has been added to the service request.
Notify: Related Service Request Created Message	Notifies recipient that an agent has created a relationship with another service request. For example, if an agent has indicated another service request is a duplicate of the service request.
Notify: Related Service Request Removed Message	Notifies recipient that a relationship between a service request and a second service request or object has been removed. For example, if an agent removes the link indicating a duplicate service request.
Notify: Related Service Request Updated Message	Notifies recipient that a linked service request has been updated.
Notify: Service Request Contact Added Message	Notifies recipient that a new contact has been added to the service request.
Notify: Service Request Updated Message	Notifies recipient that a service request has been updated.

Template Name	Description
Notify: Contacts of Related Service Requests	Notifies contacts of related service request that the status of the primary service request has been updated.
Notify: Associated Party Added	For Case Management only: Notifies recipient that a party has been associated with the case.
Notify Associated Parties: Case Create Message	For Case Management only: Notifies specified parties that they have been associated to a new case.
Notify: Associated Parties of Related Cases Message	For Case Management only: Notifies specified parties in a case that the status of a related case has been updated.
Notify Associated Parties: Case Status Updated Message	For Case Management only: Notifies specified parties that the case status has been updated.

Preconfigured HTML Templates for Contact Notifications

The application includes the following four templates you can use to notify service request contacts.

Please note that you must keep the IBGUCONTENT tokens without modification in the body of any text messages you set up:

```
&IBUCONTENT1&IBUCONTENT2&IBUCONTENT3&
IBUCONTENT4&IBUCONTENT5&IBUCONTENT6&
IBUCONTENT7&IBUCONTENT8&IBUCONTENT9&
IBUCONTENT10&IBUCONTENT11&IBUCONTENT12&
IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&
```

These tokens are not merge fields, they merely bring over the information from Oracle iSupport where the content is configured.

The following table provides information about the template sent on Oracle iSupport service request creation:

Template Attribute	Value
Internal Name	CS_SR_IBU_EVT_SR_CREATED
Display Name	Notify Contact: iSupport Service Request Created Message

Template Attribute	Value
Subject	Service Request &REQUEST_NUMBER Created
Text Body	Service Request &REQUEST_NUMBER has been created. You are receiving this notification because you have been listed as a contact on this service request. &IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&URL to view Service Request #&REQUEST_NUMBER
HTML Body	&STYPESHEET&BRANDING&Service Request &REQUEST_NUMBER has been created. You are receiving this notification because you have been listed as a contact on this service request. &IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&Click here to view Service Request #&REQUEST_NUMBER

The following table provides information about the template sent on the addition of a service request contact:

Template Attribute	Value
Internal Name	CS_SR_IBU_EVT_CNT_ADDED
Display Name	Notify Contact: iSupport Service Request Contact Added Message
Subject	New Contact Added to Service Request &REQUEST_NUMBER

Template Attribute	Value
Text Body	A new contact has been added to Service Request &REQUEST_NUMBER. You are receiving this notification because you have been listed as a contact on this service request.&IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&URL to view Service Request #&REQUEST_NUMBER
HTML Body	&STYPESHEET&BRANDING&A new contact has been added to Service Request &REQUEST_NUMBER. You are receiving this notification because you have been listed as a contact on this service request. &IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&Click here to view Service Request #&REQUEST_NUMBER

The following table provides information about the template sent on the addition of a knowledge management solution:

Template Attribute	Value
Internal Name	CS_SR_IBU_EVT_SOLUTION_ADDED
Display Name	Notify Contact: iSupport Solution Added Message
Subject	Solution &SOLUTION_NUMBER added to Service Request &REQUEST_NUMBER
Text Body	A new knowledge base solution has been added to Service Request &REQUEST_NUMBER. You are receiving this notification because you have been listed as a contact on this service request.&IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&URL to view Service Request #&REQUEST_NUMBER

Template Attribute	Value
HTML Body	&STYPESHEET&BRANDING&A new knowledge base solution has been added to Service Request &REQUEST_NUMBER. You are receiving this notification because you have been listed as a contact on this service request.&IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&Click here to view Service Request #&REQUEST_NUMBER

The following table provides information about the template sent on the change in service request status:

Template Attribute	Value
Internal Name	CS_SR_IBU_EVT_STATUS _CHANGE
Display Name	Notify Contact: Service Request Status Changed Message
Subject	Service Request &REQUEST_NUMBER Status Has Changed
Text Body	The status of Service Request &REQUEST_NUMBER has changed from &REQUEST_STATUS_OLD to &REQUEST_STATUS. You are receiving this notification because you have been listed as a contact on this service request.&IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&URL to view Service Request #&REQUEST_NUMBER

Template Attribute	Value
HTML Body	&STYPESHEET&BRANDING&The status of Service Request &REQUEST_NUMBER has changed from &REQUEST_STATUS_OLD to &REQUEST_STATUS. You are receiving this notification because you have been listed as a contact on this service request. &IBUCONTENT1&IBUCONTENT2&IBUCONTENT3& IBUCONTENT4&IBUCONTENT5&IBUCONTENT6& IBUCONTENT7&IBUCONTENT8&IBUCONTENT9& IBUCONTENT10&IBUCONTENT11&IBUCONTENT12& IBUCONTENT13&IBUCONTENT14&IBUCONTENT15& IBUCONTENT15&Click here to view Service Request #&REQUEST_NUMBER

Available Tokens

You can merge service request information into your message by entering tokens. (In Oracle Workflow these tokens are called "item attributes".)

The following table provides a list of available tokens and their meaning. Please note that some of the available tokens represent information that is not visible to users or to message recipients and so must not be used in messages. For example, Customer Product ID, is an internal application number that is not visible to the agent or customer. These internal tokens are marked with a "Yes" in the "Internal Only?" column.

Display Name (Explanation)	Internal Name	Internal Only?
Created By (Name of individual who created the service request.)	CREATED_BY	No
Customer Product ID	CUSTOMER_PRODUCT_ID	Yes
Expected Resolution Date (Resolve by field)	EXPECTED_RESOLUTION_DATE	No
Initiator Role (Workflow role of the user who has initiated the transaction that triggered the notification)	INITIATOR_ROLE	Yes

Display Name (Explanation)	Internal Name	Internal Only?
Inventory Item ID	INVENTORY_ITEM_ID	Yes
Old Request Status (Former service request status)	REQUEST_STATUS_OLD	No
Owner ID	OWNER_ID	Yes
Owner Name (Service request owner)	OWNER_NAME	No
Owner Role (Oracle Workflow role of the service request owner)	OWNER_ROLE	Yes
Previous Owner ID	PREV_OWNER_ID	Yes
Previous Owner Name (Former service request owner)	PREV_OWNER_NAME	No
Previous Owner Role (Oracle Workflow role of the former service request owner)	PREV_OWNER_ROLE	Yes
Problem Code	PROBLEM_CODE	No
Problem Description	PROBLEM_DESCRIPTION	No
Product Description	PRODUCT_DESCRIPTION	No
Request Customer (Customer on service request)	REQUEST_CUSTOMER	No
Request Date	REQUEST_DATE	No
Request ID	REQUEST_ID	Yes

Display Name (Explanation)	Internal Name	Internal Only?
Request Number (Service request number)	REQUEST_NUMBER	No
Request Severity	REQUEST_SEVERITY	No
Request Status	REQUEST_STATUS	No
Request Summary	REQUEST_SUMMARY	No
Request Type	REQUEST_TYPE	No
Request Urgency	REQUEST_URGENCY	No
Resp Appl ID	RESP_APPL_ID	Yes
Resp ID	RESP_ID	Yes
Solution Summary (Summary of the solution being added to the service request)	SOLUTION_SUMMARY	No
Updated By (Name of the individual who last updated the service request.)	UPDATED_BY	No
URL agents can click to launch the Service Request window (Forms) displaying the service request	REQUEST_FORM	N/A
URL Oracle iSupport users can click to view service request details	NTFY_REQUEST_NUMBER_URL	N/A
User ID	USER_ID	Yes
Workflow Administrator Role	WF_ADMINISTRATOR	Yes

The SERVEREQ item type includes additional item attributes which are specific to internal application workflows.

Displaying Existing Notification Rules

Notifications rules specify both the conditions that trigger a notification and who gets notified.

To display existing notification rules under the Service responsibility, navigate to Setup, Rules, Notification Rules.

The View Notification Rules page lists existing rules.

Event	Condition	Notify	Type	Name	Relationship	Template Name	Update	Delete
Contact added to Service Request	Always	Primary Contact				Notify: Service Request Contact Added Message		
Published Solution added to Service Request	Always	Primary Contact				Notify: Published Solution Added to Service Request Message		
Service Request Created	Always	Owner				Notify Owner: Service Request Created Message		
Relationship Created	Root Cause of	Owner				Notify: Related Service Request Created Message		
Service Request Owner Changed	Always	New Owner				Notify New Owner: Service Request Reassigned Message		

On this page:

- Click **Delete** (the trash can icon) to delete a rule.
- Click **Update** (the pencil icon) to update a rule. See Updating Existing Notification Rules, page 21-27.
- Click**Define Notification Rules.** to create a new rule. SeeCreating a New Notification Rule, page 21-24.

Creating a New Notification Rule

Use this procedure to create a new notification rule as part of the notification setup process.

See the following topics for more information:

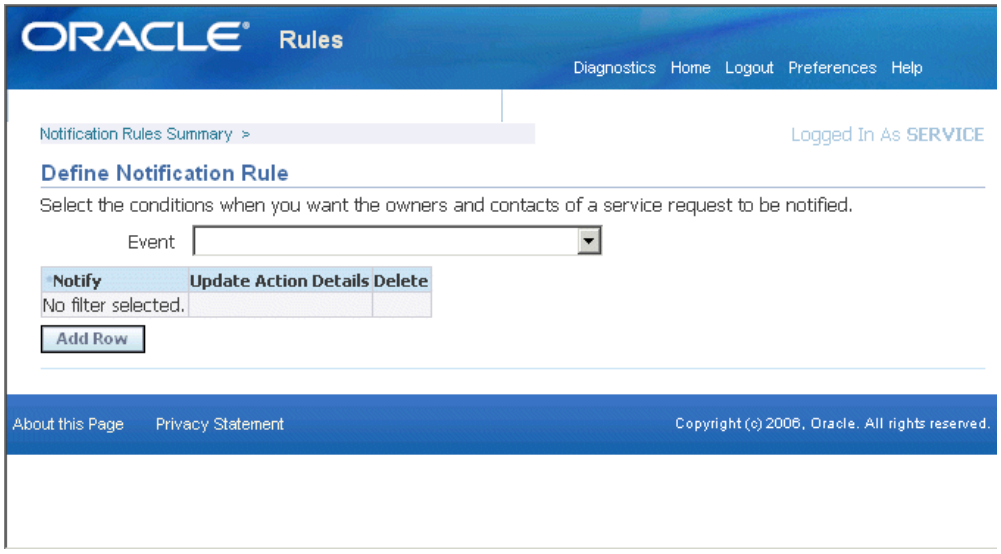
- Notification Overview, page 21-1
- Setting Up Notifications, page 21-14

To create a new notification rule :

1. Under the Service Responsibility, navigate to Setup, then Rules, and select Notification Rules.

2. Click **Define Notification Rules**.

   The Define Notification Rule page appears.



3. Select the event for the rule using the Event list. For a description of each event, see Events That Trigger Notifications , page 21-6.

4. Click **Go**.

   The page displays any rules already created for this event.

5. Click **Add Row**.

6. In the new row, select the conditions you want to use as a trigger for the notification. The conditions are different for each type of event.

   For example, to send out a notification each time a service request changes a status, select:

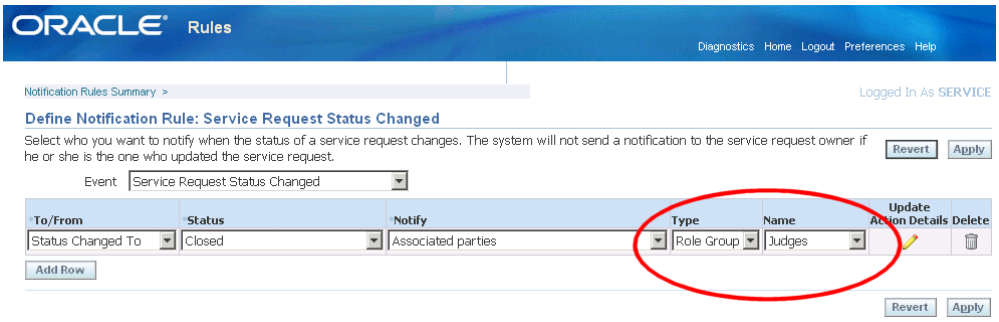
   - The status to trigger the notification.
   - The condition.

     Whether you want to send the notification each time a service request changes to the target status or changes from that status.
   - Whom you want to notify.

For example, you can notify all active contacts on the service request, the service request owner, or all the owners of linked service requests. For cases, you can also notify associated parties or associated parties on the linked cases.

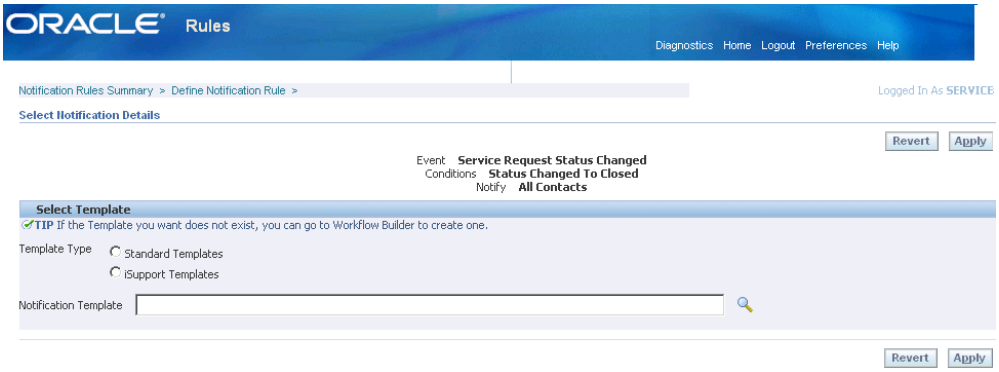
The Type and Name fields (highlighted in the image below) are enabled only for notifying associated parties in Case Management.

In Case Management, you can use them to notify individuals with a specific role or everyone in a role group. For example, you can notify everyone with the role of attorney or everyone in the legal team, including attorneys, clerks, and investigators.



7. Click **Update Action Details**.

   The Select Notification Details page appears.



8. If you are notifying contacts, choose the option for the type of template you want to use:

   - **Standard Templates**: Templates based on the predefined text templates. (Their internal names are prefaced with "CS_SR_EVT".)

   - **iSupport Templates**: These are templates based on the seeded HTML templates (prefaced with "CS_SR_IBU_EVT").

Note: If your notification rule is configured to notify recipients that are not contacts in the service request, then you must use the standard templates. In this case, the application selects the Standard Template option for you and disables the iSupport Templates choice.

For an explanation of the two template types, see Notification Template Types, page 21-3.

9. Click **Search for Notification Template** (the searchlight icon) and use the list of values to select the template.

10. Click **Apply.**

11. To create or update another rule, select the View Notifications Rule link at the top left of the page.

Updating Existing Notification Rules

Use this procedure to update existing notification rules. You can delete rules, update existing rule conditions, or choose different notification message templates.

To update existing notification rule:

1. Under the Service responsibility, navigate to Setup, then Rules, and select Notification Rules. The View Notification Rules page appears.

2. Click **Update** (the pencil icon) for the rule type you want to update.

   The Define Notification Rule page appears displaying the rules already associated with this event.

3. To delete a rule, click **Delete** (the trash can icon).

4. You can also modify the conditions for this rule. The procedure is similar to creating new conditions.

5. To select a different notification message template for this rule:

   1. Click **Update Action Details**.

      The Notification Details page appears.

   2. If you are notifying contacts with this rule, choose the option for the type of template you want to use:

- Standard templates are based on the predefined text templates. (Their internal names are prefaced with CS_SR_EVT.)
- iSupport templates are based on the predefined HTML templates (prefaced with CS_SR_IBU_EVT).

  See Notification Template Types, page 21-3 for an explanation of the two types.

3. Click **Search for Notification Template** (the searchlight icon) and choose the template you want to use.

6. Click **Apply.**

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Setting Up Display of Customer Information

This chapter covers the following topics:

- About Displaying Customer Information for Agents
- About Customer Profiles
- Customer Profile Setup Process Overview
- Defining Profile Ratings
- Associating Ratings with Colors
- Defining Profile Check Categories
- Defining Profile Check Variables
- Defining Drill Down for a Profile Check
- Enabling Application Windows for Drill Down
- Defining Profile Checks
- Predefined Profile Checks
- Defining Variable Profile Checks
- Defining Boolean Profile Checks
- Grouping Profile Checks for Display in Customer Profile Windows
- Grouping Profile Checks for Display in Dashboard Tabs
- Determining Access by Application Module and Responsibility
- Running the Customer Profile Engine
- Running the Customer Profile Engine for a Subset of Parties
- Setting Automatic Refresh of Profiles on the Dashboard
- Customizing Dashboard Displays by Customer Attributes

About Displaying Customer Information for Agents

You can set up your application to provide agents with summaries of customer information, such as the number of open and escalated service requests, payments in arrears, and expiring contracts.

Agents can view the summarized customer information in three places:

- The Dashboard tab

  Available in the Contact Center (Oracle TeleService) and E-Business Center (Oracle TeleSales).

- The Profile window

  Available in the Service Request and Override Customer Criticality windows in Oracle TeleService and the Repair Order window in Oracle Depot Repair.

- The Agent Dashboard page

  Agent Dashboard pages are available in Customer Support, Service Desk, and Case Management.

To create a view of customer data in the dashboard, you create a dashboard group, a grouping of individual customer indicators called customer profiles.

Setting up customer profiles is also a prerequisite for implementing relationship plans. While the information on the Dashboard tabs and Customer Profile windows summarizes information about customers, they require agents to check that information periodically. Relationship plans, described in a separate section of this guide, automatically display an alert message or a script when a customer meets certain conditions based on your customer profile setup.

Note: Customer profiles are not the same as system profile options.

For a brief overview of customer profile concepts, see About Customer Profiles, page 22-3.

For an overview listing the major steps of the setup procedure, see Customer Profile Setup Process Overview, page 22-6.

Details of individual steps are covered in the following topics:

- Defining Profile Ratings, page 22-8
- Associating Ratings with Colors, page 22-10
- Defining Profile Check Categories, page 22-11
- Defining Profile Check Variables, page 22-11

- Defining Profile Checks, page 22-17
- Defining Drill-Downs for a Profile Check, page 22-13
- Grouping Profile Checks for Display in Customer Profile Windows, page 22-22
- Grouping Profile Checks for Display in Dashboard Tabs, page 22-24
- Determining Access by Module and Responsibility, page 22-27
- Running the Customer Profile Engine, page 22-30
- Running the Customer Profile Engine for a Subset of Customers, page 22-30
- Customizing Dashboard Displays by Customer Attribute, page 22-33

About Customer Profiles

Customer profiles make it possible for you to provide agents with:

- Summaries of customer information in a graphical format, page 22-3
- The ability to drill down to the details of the information the profiles highlight, page 22-5

You can create different views of customer information for agents by application and by responsibility, or by customer attribute through the implementation of a user hook (See Customizing Dashboard Displays by Customer Attributes, page 22-33).

Summaries of Customer Information

Customer profiles make it possible for you to create summaries of key customer information, called profile checks. Profile checks can summarize information by customer, by account, by customer contact, or by employee.

Profile checks can be of two types:

- Variable, page 22-3
- Boolean (Yes and No), page 22-4

Variable

The variable profile checks summarize information such as the number of open service requests or the number of booked orders for a particular customer, an account, an employee, or a contact. Each profile check displays a number (the number of open service requests or expiring contracts, for example), a rating (high, medium, low) and a color (green, yellow, and red, for example). The rating and color together comprise a

rating label.

Boolean (Yes and No)

Boolean profiles compare the level of a profile check variable against a constant or an expression with one or more variables and returns either a Yes or No. For example: "Does the customer, account, or contact have more than one open escalation?", "Does the customer have a credit hold?".

Views of Customer Information in a Graphical Format

In Service Request and Contact Center windows, agents can view customer information summarized by the profile checks in two places:

- The Contact Center's Dashboard tab

  The Dashboard tab displays a group of profile checks called a dashboard group. You can separate the headings by titles called categories.

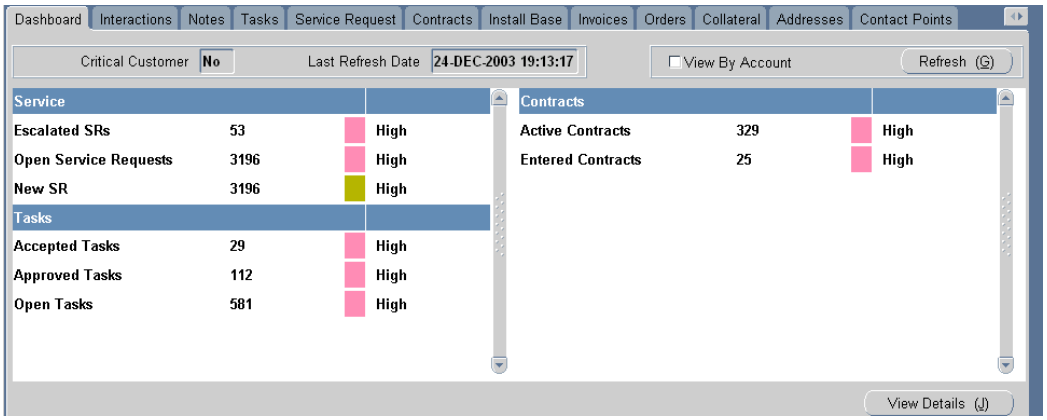
  You can specify a different dashboard group by customer category and responsibility. For example, displaying different information for consumers and for business customers or different information to agents handling customer account issues from those handling hardware problems.

  By customizing the application with a user hook, you can instead display different dashboard groups based on any customer criteria you wish, such as geographical location or product ownership. See Customizing Dashboard Displays by Customer Attributes, page 22-33.

- The Profile window

  The Profile window displays a list single profile checks in the order you determine. Profile windows do not use category headings.

Here is a sample Dashboard on the Contact Center showing key customer information organized in three dashboard categories: Service, Tasks, and Contracts.



Agents can filter their views of the profile checks in the dashboard group by account, customer, or contact by making a selection from View Details For list on the header.

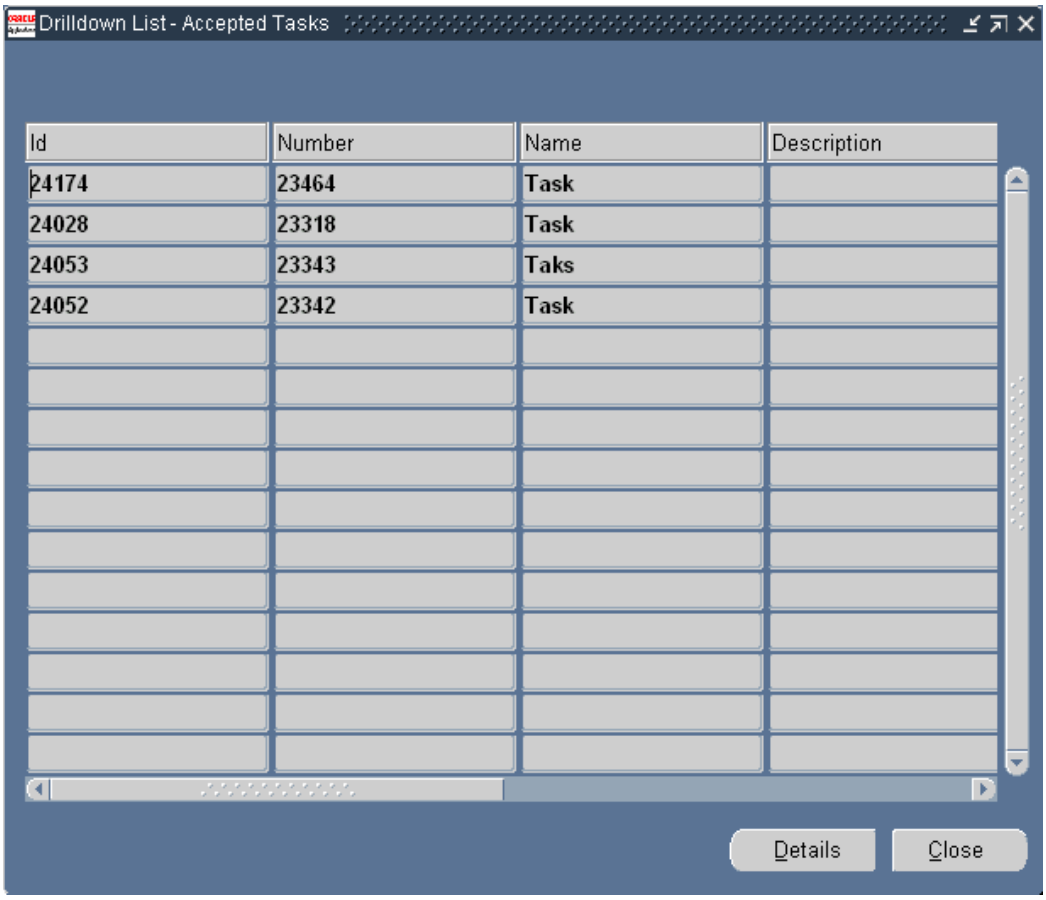
Profile windows display only individual profile checks. Here is a sample Profile window:

The Ability to Drill Down to Details

You can set up customer profiles to make it possible for agents to drill down from a variable profile check in a Dashboard tab or customer Profile window to a detailed list of all items in the Drilldown List window. This is called a first-level drill down.

During implementation you can select which fields agents see in this window. Boolean (Yes or No) profile checks do not permit you to drill down.

Here is a sample first-level drill down window:



Agents can drill down to the individual item in this window by clicking on one of the displayed fields.

The item displays in an application window. This is called the second-level drill down.

Customer Profile Setup Process Overview

Use this overview of major setup steps to guide you through the customer profile setup.

To set up customer profiles:

1. Set up the rating labels (the wording and colors) to use with your profile checks and the categories you want to use to organize the profile checks on the Dashboard tab:
    1. Under the Service responsibility, navigate to Setup, then select Customer Care Lookups.
    2. Define the general labels you wish to use to classify customer information for agents. For example, you may wish to classify customers into three categories, Low, Medium, and High. See Defining Profile Ratings, page 22-8.

3. Navigate to Setup, Customer Management, Customer Profiles.

4. On the Preferences tab, associate the profile ratings you have defined with color codes to create rating labels. For example, you may wish to display red next to the word High. See Associating Ratings with Colors, page 22-10.

5. On the same tab,define the headings (categories), which organize the profile checks on the Dashboard. See Defining Profile Check Categories, page 22-11.

2. Navigate to Setup, then Customer Management, and select Customer Profiles.

3. On the Profile Variable tab, define the variables you wish to use in your profile checks. This is where you enter the SQL queries that retrieve and summarize your customer data. You can use the same variable in multiple profile checks.

   For details see Defining Profile Check Variables, page 22-11.

4. On the Profile Checks tab, define all of the profile checks you want to use to summarize customer information in the Profile windows and Dashboard tabs. You get to select which agents see them in a subsequent step. See Defining Profile Checks, page 22-17.

5. On the Drilldown tab, set up the two levels of drilldowns your agents use to view the details of the customer information summarized by the profile check. The first level provides a window with a list of individual records; the second level displays the individual record itself. See Defining Drill-Downs for a Profile Check, page 22-13.

6. On the Profile Groups tab, define the groupings of profile checks for display in the customer Profile window. By matching these profile groups to application modules and responsibilities in a later step, you can create different customer overviews for different groups within your organization. See Grouping Profile Checks for Display in Customer Profile Windows, page 22-22.

7. On the Dashboard Groups tab, define the groupings of profile checks for display in the Dashboard tabs of the Contact Center and E-Business Center windows.

   You can create different dashboard groups to provide different views of customer information by application modules, responsibilities, and customer type (business or consumer). See Grouping Profile Checks for Display in Dashboard Tabs, page 22-24.

   If you prefer to specify different views of customers by a customer attribute such as geographical location or product type, for example, then you can instead use a user hook to customize the application. See Customizing Dashboard Displays by Customer Attributes, page 22-33.

8. On the Preferences tab, specify the application modules and responsibilities that can

view the profile groups and dashboard groups you have created. See Determining Access by Module and Responsibility, page 22-27.

9. Set up the concurrent program that automatically refreshes the Dashboard tab and Profile views of customer information. See Running the Customer Profile Engine, page 22-30.

10. You can have the application refresh customer information on the dashboard each time an agent displays a customer by setting the profile Customer Care: To Allow Auto Refresh Facility for Dashboard. For performance reasons, you may wish to refresh only key customer indicators in real time. See Setting Automatic Refresh of Profiles on the Dashboard, page 22-31.

Defining Profile Ratings

Use this procedure to modify or create the labels used to describe the ranges of values of your profile checks. The application provides four seeded values: High, Medium, Low, or "Key Parameter". These labels are called profile ratings.

Profile ratings are implemented in Customer Care using standard Oracle Applications lookup codes. Profile rating codes are implemented with the User access level. This means that you can create new labels and modify the seeded values.

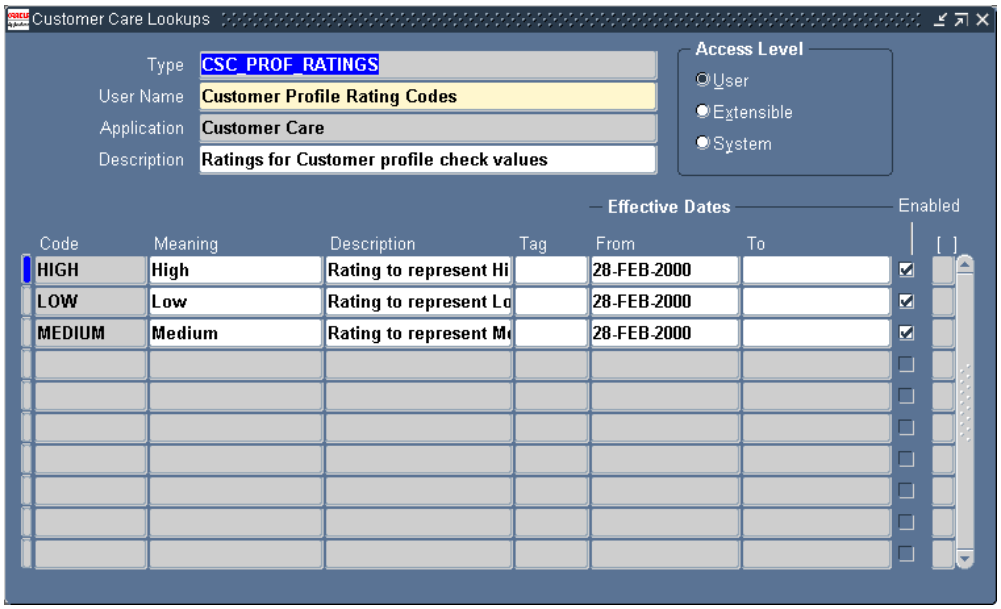
Prerequisites:

None

To define profile ratings:

1. Under the Service responsibility, navigate to Setup, then select Customer Care Lookups.

   The Customer Care Lookups window appears.



2. In the Type field perform a search using the Query by Example method on `CSC_PROF_RATINGS`.

   The window displays the three predefined ratings, High, Medium, and Low, and any other ratings your organization has defined.

3. To create a new rating code:

   1. Place your cursor in a row and click **New** in the toolbar.

   2. Enter a name in the Code field to associate with while building the profile checks.

   3. Enter a name in the Meaning field. This is the name that the agents see on the Dashboard tab and Customer Profile window.

   4. Optionally, enter a description in the Description field.

      The Tag field is not used.

   5. To control the dates this rating code is to be effective, enter dates in the Effective Date fields.

4. Verify that the Enabled check box is selected.

5. Save your work.

Associating Ratings with Colors

Use this procedure to associate colors with the ratings you defined to create a rating label. It is here that you specify, for example, that the label High always displays in the Dashboard and Customer Profile windows together with the color red.

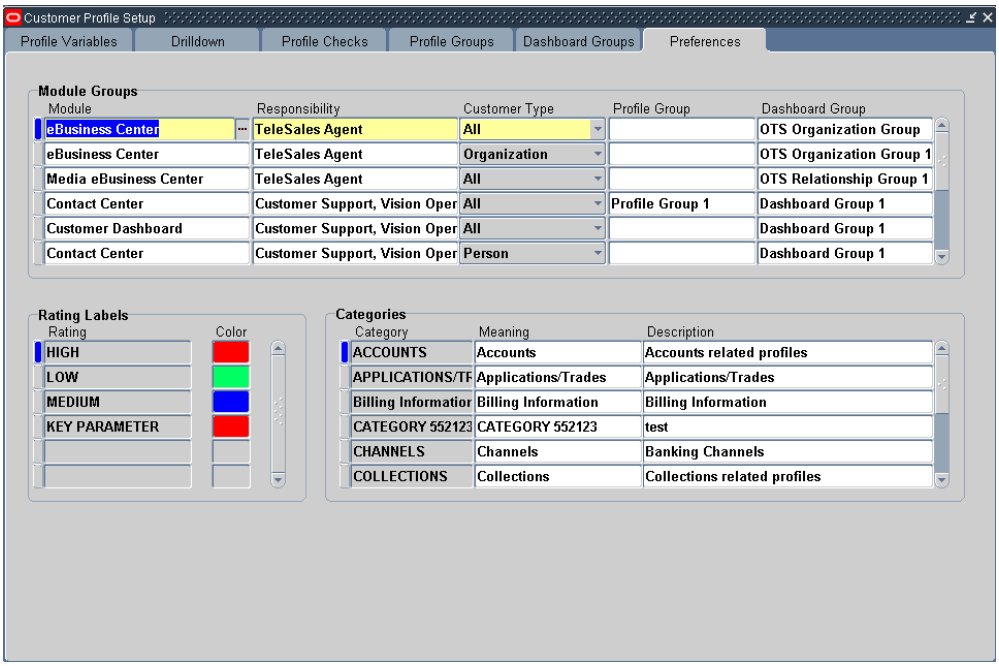
Prerequisites:

You must define profile ratings as described inDefining Profile Ratings, page 22-8.

To associate ratings with colors:

1. Under the Service responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.

2. Select the Preferences tab.



3. In the Rating Labels region, select the rating you want to associate with a color from the Rating list of values. The Rating field displays the Code value from the lookup, not the value users see.

4. Select a color from the Color list of values, to associate with the rating.

5. Save your work.

Defining Profile Check Categories

Use this procedure to define the categories used in the Dashboard tab to group profile checks. For example, open, escalated, and accepted tasks can all be grouped under the Tasks category.

Prerequisites:

None

To define categories:

1. Under the Service responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.
2. Select the Preferences tab.
3. In the Categories region of the tab, for each category you wish to define:
    1. Enter a name for the category in the Category field. The internal name is not displayed on the Dashboard tab.
    2. Enter the wording in the Meaning field. This detail is displayed on the Dashboard tab .
    3. Optionally enter a description for the category in the Description field.
4. Save your work.

Defining Profile Check Variables

Use this procedure to define the variables you want to use in your profile checks. The variables contain the SQL statement that is executed to retrieve the customer profile check value. You can use the same variables in multiple profile checks.

Your SQL statements can contain three bind variables:

- **:party_id**: Use this variable if the SQL statement refers to a party and contact.
- **:party_site_id**: Use this variable if the SQL statement refers to a party site.
- **:cust_account_id**: Use this variable if the SQL statement refers to a customer account.
- **:employee_id**: Use this variable if the SQL statement refers to an employee.

No other bind variables are supported.

Your SQL statement must be constructed so that only a single row is returned by the query.

For a detailed description of the database objects you can include in your SQL statement, please refer to the Electronic Technical Reference Manual (eTRM). The Customer Care database objects you can use are stored in the folder named "CSC".

Prerequisites:

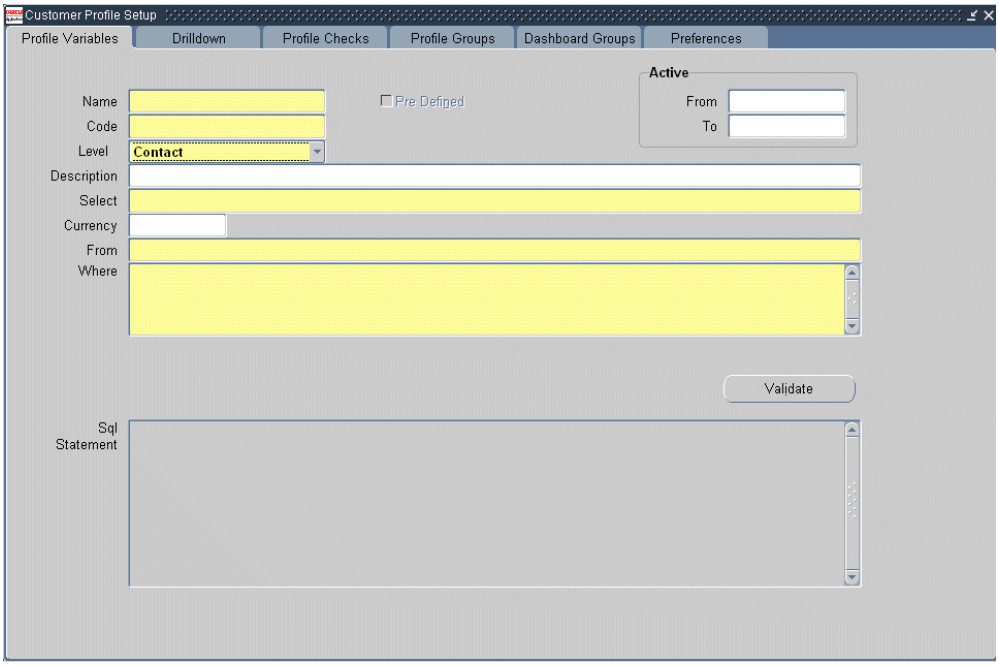
None

To define a profile check variable:

1. Under the Service Responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.

   The Customer Profile Setup window appears.

2. Select the Profile Variables tab.



3. Click **New** on the toolbar.

4. Enter a name in the Name field.

5. Enter a unique name in the Code field.

6. If you are displaying the information from this variable in the Dashboard tab, then using the Level list, select the appropriate view where the information is to appear. Available views are: Customer, Account, Employee, Contact and Party Site. Agents

use these views to filter the information in the Dashboard tab.

7. To restrict the use of this variable, enter dates in the Active: From and Active: To fields.

8. Optionally enter a description of the profile variable in the Description field.

9. Enter the appropriate components of the SQL statement in the following fields:
   - Select (mandatory field).
   - Currency (optional field).
   - From (mandatory field).
   - Where (mandatory field).

10. Click **Validate** to validate the SQL statement.

11. Click **Save** in the toolbar to save the variable .

    Your SQL statement is validated automatically when you save. You cannot save an invalid SQL statement.

Defining Drill Down for a Profile Check

Use this procedure to define the drill down windows for a profile check. There are two levels of drill down windows. The first level lists the items summarized by the profile check. The second-level drill down displays the details of an individual record. An agent displays an item in the application window by double clicking on one of the fields in the summary list.

Prerequisites:

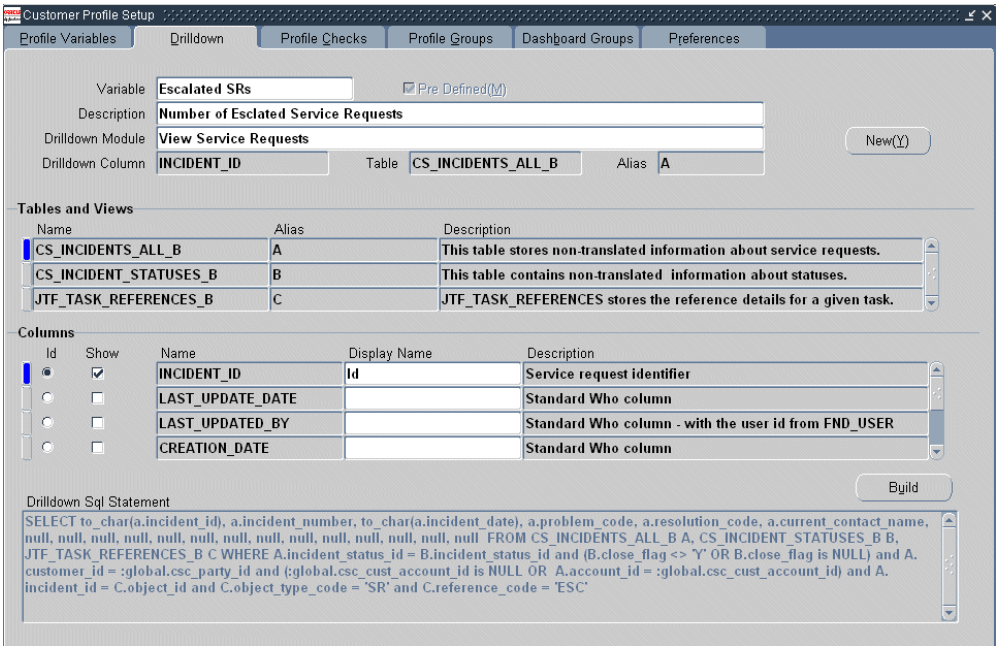
You must create the variables for the profile check as described inDefining Profile Check Variables, page 22-11.

To define drill down windows:

1. Under the Service responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.

   The Customer Profiles window opens.

2. Select the Drilldown tab.



3. From the Variable field, select the profile variable for which you want to define the drilldown.

   The Description field as well as the Tables and Views region display information about the selected profile variable.

4. Using the Drilldown Module list of values, select the application module you want to use for the second-level drill down. If the module you wish to use is not listed, then you can add it to the list by following the steps outlined in Enabling Application Windows for Drill Down, page 22-15.

5. Select up to 20 columns you wish to display in the first-level drill-down list:

   1. Select one of the tables in the Table and Views region.

      The Columns region displays the available columns for that table.

      > **Note:** Only columns from registered tables and views are displayed. Column names are retrieved from FND_COLUMNS and FND_VIEWS. If the columns you wish to use are not visible, check to see if the table or view is registered.

   2. Select the Show check box for the columns that you wish to display in the first-level drill down.

   3. For the columns you want to display, enter a user-friendly name in the Display Name field. The text you enter here is what agents see in the first-level drill

down window.

6. Select one of the columns in the first-level drill down as the column that agents use to drill down to the application window (the second-level drill down). For example, if you select the service request number, an agent can view the details of the service request in the Service Request window by double-clicking on the service request number in the summary list.

   1. Select the table in the Table and Views region.

      The Columns region displays the available columns for that table.

   2. Select the ID option for the column that you want to use for the drill down.

      Note: You can select only one ID column for a profile variable.

   3. Click Save in the toolbar.

      The column name of the ID you have selected, displays in the Drilldown Column field at the top of the tab.

7. Optionally, click **Build** to generate and display the SQL for the drill down.

   The SQL statement is validated when you save. You cannot save an invalid SQL statement.

Enabling Application Windows for Drill Down

Use this procedure to enable application windows for drill down.

Prerequisites:

You must define the form object first in the Form Functions window. You can access this window by logging in under the Systems Administrator Responsibility and navigating to Application, and selecting Function.

To enable application windows for drill down:

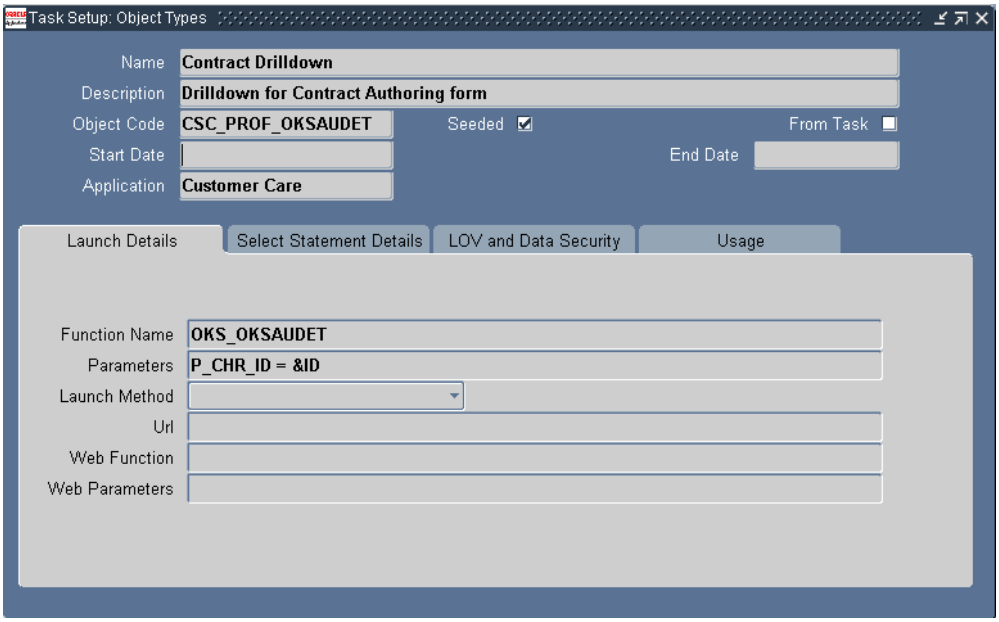
1. Under the Service responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.

   The Customer Profiles window opens.

2. Select the Drilldown tab.

3. Click **New**.

   The Task Setup: Object Types window opens.



4. Enter a name for the drill down module object type you are creating in the Name field.

   Note: The name you enter here is for your reference only. It does not display in the Drilldown Module list of values.

5. Enter a description for the drill down module in the Description field.

6. Enter a value in the Object Code field that begins with `CSC_PROF`, for example: `CSC_PROF_OKSAUDET`.

7. You must know both the function name and the window name displayed for the user. The function name, for example, `OKS_OKSAUDET`, is what you enter in the Function Name field in this window. You need to know the associated User Function Name: `Author Service Contracts` because this is what gets displayed in the Drilldown Module list of values on the Drilldown tab. Use the following procedure to find either name:

   1. Switch Responsibility to Systems Administrator.

   2. Navigate to Application, and select Function.

      The Functions window appears.

   3. Using the Query by Example method, display the function either using the Function or User Function Name fields.

4. Note down the names of both fields.

8. Enter the function name in the Function Name field. For example, `OKS_OKSAUDET`.

   The Drill Down Module list of values displays the User Function Name associated with this form function name.

9. Enter the parameters.

10. Select Customer Care from the Application Name list of values.

11. Entry in the Usage region is optional. You can select CUSTOMER_CARE from the list of values, which also populates the Object User field. The Seeded check box indicates whether the module is predefined.

12. Save your changes.

13. Close the form to return to the Drilldown tab.

    The new application window is available in the Drilldown Module field list of values.

Defining Profile Checks

Use this procedure to define profile checks.

You can use the predefined profile checks as a guide. See Predefined Profile Checks, page 22-18.

Prerequisites:

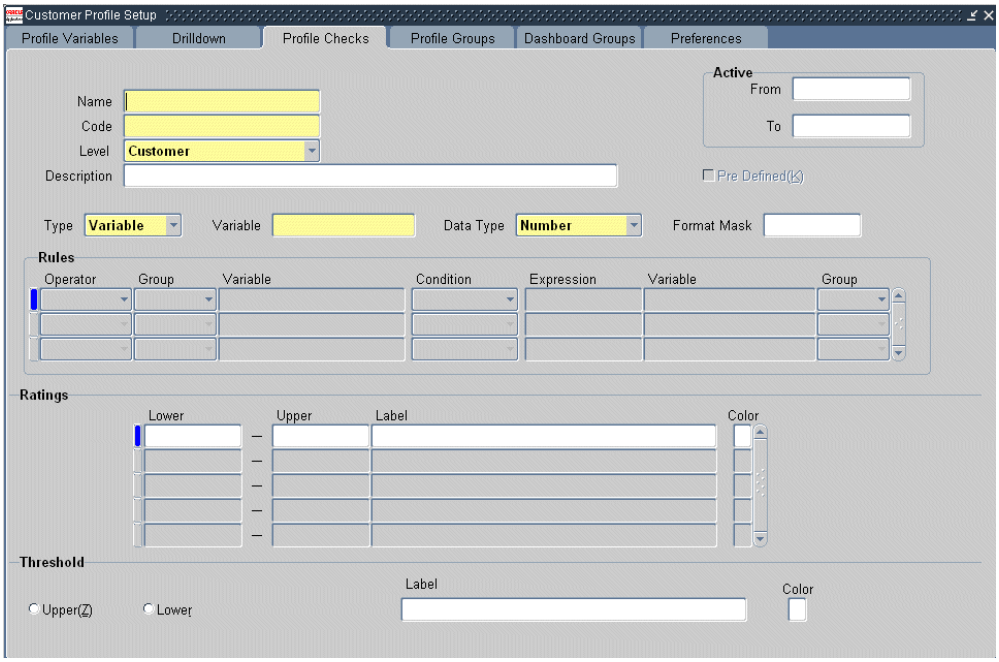
You must define profile variables, ratings, and rating labels first.

To define profile checks:

1. Under the Service responsibility, navigate to Setup, then Customer Management, and select Customer Profiles Setup.

   The Customer Profile Setup window appears.

2. Select the Profile Checks tab.



3. Enter a name for the profile check in the Name field. This is the wording the agents see in the Dashboard tab or Profile window.

4. The Code field defaults to the name you enter in the Name field. You can substitute the value in the Code field with another unique value.

5. Select the level for the profile check depending on what type of information the profile check summarizes. The options are: Customer, Account, Contact, Employee, or Party Site.

6. Enter a description for the profile check in the Description field.

7. Enter the date when the profile check is to be in force by specifying the Active From and Active To fields.

8. To create a variable profile check, select **Variable** from the Type list and follow the steps described in Defining Variable Profile Checks, page 22-20.

9. To create a Boolean (Yes or No) profile check, select **Yes or No** from the Type list and follow the steps described in Defining Boolean Profile Checks, page 22-21.

10. Save your work.

Predefined Profile Checks

Oracle TeleService provides the following 32 predefined profile checks you can use as a

guide to define your own. All but Critical Customer are variable profile checks:

> **Note:** Do not modify the predefined data. If you want to make modifications, please make a copy and modify your copy.

The following predefined profile checks are related to customers:

- Accepted Tasks
- Active Contracts
- Approved Tasks
- Booked Orders
- Cancelled Contracts
- Cancelled Orders
- Cancelled Tasks
- Critical Customer
- Customer Opportunities
- Entered Contracts
- Escalated Defects
- Escalated Service Requests
- Expired Contracts
- Expiring Contracts
- Installed Base Size (11.5.6)
- Loyalty
- On-Hold Contracts
- On-Hold Tasks
- Open Defects
- Open Orders
- Open Service Requests

- Open Tasks
- Profitability
- Rejected Tasks
- Revenue
- Satisfaction
- Terminated Contracts

The following four are for employees only:

- Eligible Plan
- Escalated SRs
- Government Identifier
- Open SRs

Defining Variable Profile Checks

Perform these steps to create a variable profile check after you have completed the basic steps described in Defining Profile Checks, page 22-17.

To define variable profile checks:

1. In the Variable field, select the variable on which the profile check is to be based. This is one of the variables you have defined in the Profile Variables tab.
2. In the Data Type field, enter the data type for the variable you have selected. The valid choices are Number, Char, and Date.
3. If appropriate, enter a format mask in the Format Mask field.
4. In the Ratings region, define value ranges and their labels. For each range:
    1. Enter a Lower and Upper number. The range you enter here cannot overlap another range.
    2. Select an appropriate label. This is one of the rating labels you have created which combine the rating and color code.

       Enter the low value for the first range and the high value for the last range as shown in the example below. In the example, leaving the Upper Value for the High range blank ensures that your profile check displays for customers of any

high value above 20.

Lower Value	Upper Value	Label
0	10	Low
11	20	Medium
21	Leave blank	High

5. You can turn the display of the profile on only when the number is below or above a threshold.

   For example, you may wish call center agents to see information on the number of open service requests for a customer regardless if the number is low or high. But managers may care only about customers with high numbers. By specifying the upper number in the Medium range as your trigger, you can display only the high range to the group of your choice. To define a threshold for a profile check:

   1. Select either the Upper or Lower radio button depending on whether you wish to use the lower or higher number for the range as the threshold.

   2. Using the Label list of values, select the range below or above which you wish the display to be triggered.

      To display the profile check only when the value is High in the above example, you select the Upper radio button and select Medium from the Label list of values.

   3. For the threshold to affect the display of information you must select the Display on Threshold check box when you define profile groups and dashboard groups. For more information, see:

      - Grouping Profile Checks for Display in Customer Profile Windows, page 22-22

      - Grouping Profile Checks for Display in Dashboard Tabs, page 22-24

Defining Boolean Profile Checks

Perform these steps to create a boolean profile check after you have completed the basic steps described in Defining Profile Checks, page 22-17.

To define boolean profile checks:

1. Select **Yes or No** from the Type list.

2. In the Rules region, build a logical expression (rule) comparing an existing profile variable with a constant or an expression.

   For example, the predefined Critical Customers profile check evaluates the expression `Open Service Requests > 5`.

3. Save the profile check you have defined.

Grouping Profile Checks for Display in Customer Profile Windows

Use this procedure to group profile checks for display in the customer Profile window. By associating the groups you create here with application modules and responsibilities you can provide different groups of agents with different customer views in the Profile window.

Prerequisites:

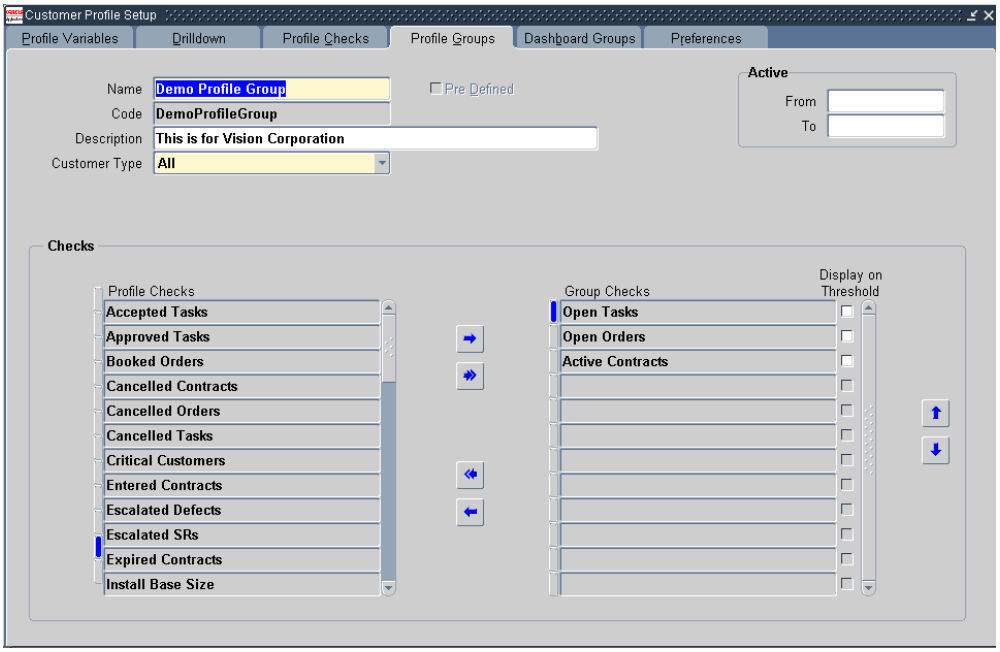
You must define profile checks before you can define Profile Groups.

To define profile groups:

1. Under the Service responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.

   The Customer Profile Setup window appears.

2. Select the Profile Groups tab.



3. In the Name field, enter a name for the profile group.

   All profile checks you have defined are displayed in the Checks region.

4. The Code field defaults based on the value you entered in the Name field.

5. In the Description field, optionally enter a description for the profile group you are defining.

6. In the Customer Type field, select the customer type you want to associate with the profile group.

   Selecting All, the default, displays the profile group you are creating for both persons (consumers) and Organizations.

   To restrict this profile group for display when agents are handling a specific customer type, select either Person or Organization.

7. You can enter dates in the Active From and Active To fields to limit the availability of this profile group.

8. In the Checks region:

   1. Select the appropriate profile check from the Profile Checks column and move it to the Group Checks column. Use the right and left arrow buttons to move the profile checks between the columns. Use the up arrow and down arrow buttons to move the selected group check up or down in the list.

2. Do not select the Display on Threshold check box, unless:

3. You have set up your profile check with a threshold.

4. You want this profile check to display only when this threshold is crossed.

   For an explanation of using thresholds, please see Defining Variable Profile Checks, page 22-20.

9. Save the Profile group.

Grouping Profile Checks for Display in Dashboard Tabs

Use this procedure to group profile checks in dashboard groups to create different Dashboard tab views for agents by application module and by responsibility.

You can use this procedure to create different views for customers, individual accounts, and for customer contacts.

Prerequisites:

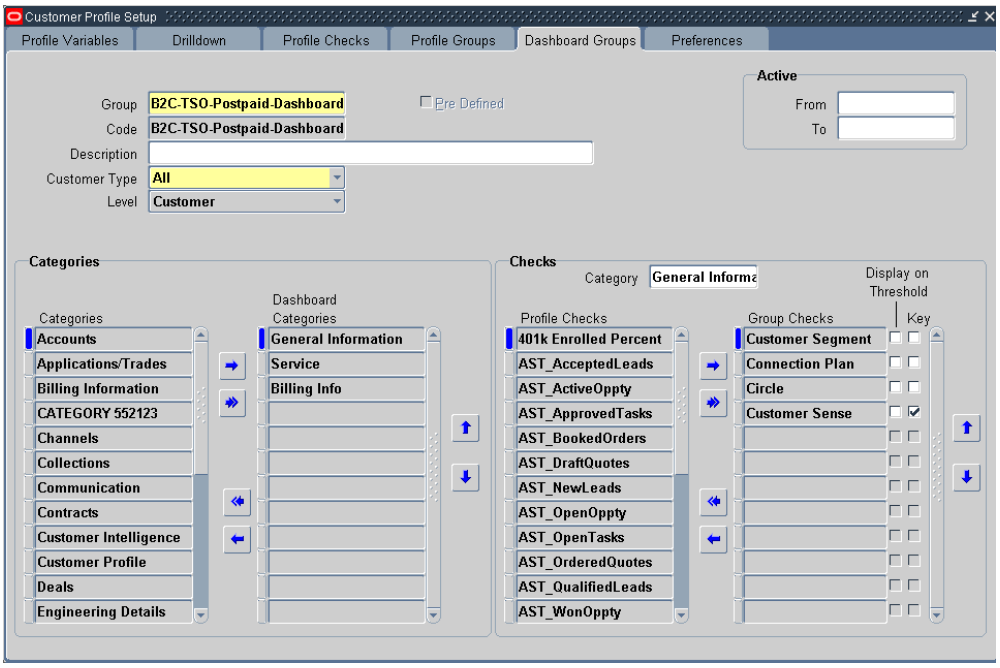
You must define profile checks and categories before you define dashboard groups.

To define dashboard groups:

1. Under the Service Responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.

   The Customer Profile Setup window appears.

2. Select the Dashboard Groups tab.



3. Enter a name for the dashboard group in the Group field.

4. The Code field defaults based on the value you entered in the Group field.

5. Enter a description for the dashboard group in the Description field.

6. From the Customer Type list, select the customer type for this dashboard group.

   The default is All, but you can restrict the usage of groups to either Organizations or Persons. Restricting a Dashboard group to a customer type means that the information displays only for customers of that type.

7. Select the level at which you wish to display this group using the Level list. You can display information on the Dashboard for customers, accounts, customer contacts, employees, and party sites. Each level requires that you to set up different profile checks, so the selection you make here restricts the profile checks you can select for the group.

   You can use the dashboard group definitions to determine the display of any one level (such as customers) or for all five levels (customers, accounts, employees, customer contacts, and party sites). Remember that the categories you set are for the entire dashboard group and are not defined for a specific level. However, the profile checks that display are applicable for the specific level that you choose.

8. To restrict the use of this dashboard group for a specific time period, enter dates in the Active From and Active To fields.

9. Select the categories to organize the information on the Dashboard tab:
    1. In the Categories region, move the categories from the Categories column to the Dashboard Categories column using the right and left arrow buttons.
    2. Order the categories in the order you want them to display in the Dashboard. Use the up and down arrow buttons to move a category up or down in the list.
10. Save your changes so your categories are available in the next step.
11. In the Checks region, specify which profile checks you wish to display under each category:
    1. Select the dashboard category you want to set up from the Category list of values.
    2. Select the profile checks you wish to use by moving them from the Profile Checks column to the Group Checks column. Use the right and left arrow buttons to move the profile checks between the columns.
    3. Determine the display order of the profile checks by ordering those you have selected (the Group Checks column). Use the up and down arrow buttons to move the selected profile check up or down in the list.
12. If you have set up a particular profile check with a threshold and wish to restrict the display using that threshold, then select the Display on Threshold check box to the right of the Group Checks column.
13. You can set up the application to automatically refresh only a key subset of the profile checks to conserve system resources. To restrict automatic refresh to only key profile checks:
    1. Specify the key profile checks by selecting the Key check box to the right of the Group Checks column.
    2. For the Contact Center, you can choose to display these in a different color by choosing a color for KEY PARAMETER. This is located in the Rating Labels region of the Preferences tab.
    3. Set the Customer Care: Permit the Dashboard to be Refreshed Automatically to Just in Time - Key to enable this setup. See Setting Automatic Refresh of Profiles on the Dashboard, page 22-31.
14. Save your dashboard group.

Determining Access by Application Module and Responsibility

Use this procedure to determine the application module, customer type, and responsibility that displays the profile groups and dashboard groups you have created.

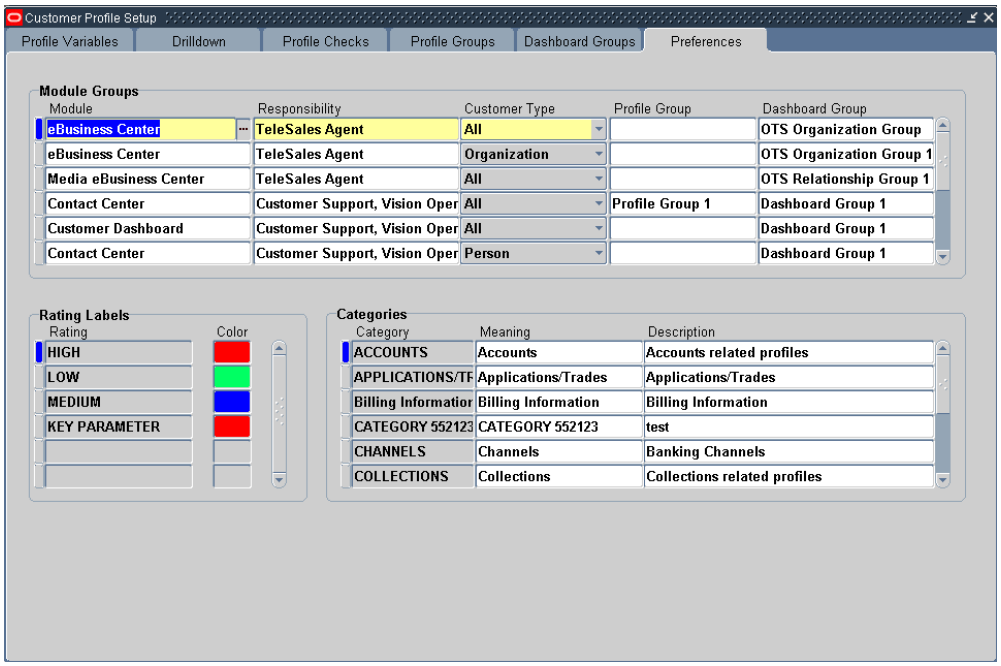
Prerequisites:

You must create the profile and dashboard groups first.

To determine access by modules, customer types, and responsibilities:

1. Under the Service responsibility, navigate to Setup, then Customer Management, and select Customer Profiles.

2. Select the Preferences tab.



3. Select an application module from the Module list of values. Although all application modules from all E-Business Suite applications appear in the list of values, you can enable access only to those applications that use the Profile window and Dashboard tabs:

   For dashboard groups, which are available in Oracle TeleService and Oracle TeleSales, you must select the following modules:

Select the module…	To enable the…	Application
Customer Dashboard	Contact Center window in Oracle TeleService	Oracle TeleService
E-Business Center	E-Business Center window in Oracle TeleSales	Oracle TeleSales
Case Management Tier 2 Agent Create Case	Create Case page	Oracle Case Management
Case Management Tier 2 Agent Read-Only Case	Read-only Case page	Oracle Case Management
Case Management Tier 2 Agent Update Case	Update Case page	Oracle Case Management
Customer Support Tier 2 Agent Create Service Request	Create Service Request page	Oracle Customer Support
Customer Support Tier 2 Agent Read-Only Service Request	Read-only Service Request page	Oracle Customer Support
Customer Support Tier 2 Agent Update Service Request	Update Service Request page	Oracle Customer Support
Incident Manager Tier 2 Agent Create Ticket	Create Ticket page	Oracle Incident Manager
Incident Manager Tier 2 Agent Read-Only Ticket	Read-only Ticket page	Oracle Incident Manager
Incident Manager Tier 2 Agent Update Ticket	Update Ticket page	Oracle Incident Manager
Service Desk Tier 2 Agent Create Service Request	Create Service Request page	Oracle Service Desk
Service Desk Tier 2 Agent Read-Only Service Request	Read-only Service Request page	Oracle Service Desk

Select the module…	To enable the…	Application
Service Desk Tier 2 Agent Update Service Request	Update Service Request page	Oracle Service Desk

4. For Customer Profile groups, which are available in Oracle TeleService and Oracle Depot Repair applications, you must select one of the following:

   - Critical Customer Management

     The Override Customer Criticality window in Oracle TeleService.

   - Enter Service Request

     The Service Request window of Oracle TeleService.

   - Depot Repair Orders

     The Repair Order window in Oracle Depot Repair.

5. Specify which responsibilities can view the profile and dashboard groups you have created:

   - Agents logging under the seeded Service responsibility can view all dashboard and profile groups by default. You can restrict their access by mapping this responsibility to the groups you want them to access. This is accomplished by selecting the responsibility using the Responsibility list of values (LOV)

   - Custom responsibilities do not give any access by default. This means you must map the group to the responsibility to grant access.

     You can map more than one responsibility to a group by creating multiple records.

6. Use the Customer Type list to restrict the type of profile and dashboard groups that appear in the Group and Dashboard Group LOVs:

   - Selecting Organization or Person restricts the selection to the profile and dashboard groups you have set up for that customer type.

   - Selecting All displays all dashboard and profile groups.

7. Select a profile group, a dashboard group, or both you want to enable using the Group (Profile Group) and Dashboard Group LOVs.

8. Save your work.

Running the Customer Profile Engine

The Customer Profile Engine is a server side PL/SQL concurrent program. You must run the Customer Profile Engine after completing the customer profile setup process so that all SQL statements defined during the setup are executed to generate the appropriate profile values.

To generate data for the contact level profiles, you must set the system profile Customer Care: Include Contact Profiles in Customer Profile Engine Batch Runs to Yes.

The Customer Profile Engine, when executed, performs the following operations in the sequence below:

- Evaluates the results of all the effective profile variables.
- Evaluates the results of all effective profile checks based on the profile variables.
- Evaluates the results for all the customers, accounts, contacts, and employees.

The Customer Profile Engine must be run to:

- Retrieve profile values for new customers
- Retrieve the latest profile values for all customers
- Reflect changes made to the profile setup
- Retrieve values for new profiles

The Customer Profile Engine can be run in two ways:

- As a concurrent program (for more information on running concurrent programs, refer to the *Oracle E-Business Suite Setup Guide*).
- This manual method fetches the latest data for the displayed customer, when agents click the Refresh button available in the Profile section or the Dashboard tab of the Contact Center or the E-Business Center in Oracle TeleSales.

The parameters for running Customer Profile Engine are:

- Party Type: Employee or Customer.
- Party Name
- Group Name: Dashboard group name.

Running the Customer Profile Engine for a Subset of Parties

By default, you can either have the profile engine evaluate a single party or all parties. If

you do not supply a party in the Party Name parameter, the profile engine evaluates all parties.

If you want to use the profile engine to evaluate a subset of parties, then you can use a user hook described in this topic. For example, a cell phone service provider can use this feature to evaluate the billing information for only the most recent customers who purchased a particular plan.

To run Customer Profile Engine for a subset of parties:

1. Create a package body with the name CSC_PROF_PARTY_SQL_CUHK

   This package returns a Ref Cursor with the SQL the application uses to select the parties to be processed.

2. Run the following script to enable the user hook:

```
UPDATE jtf_user_hooks SET execute_flag = 'Y'
WHERE pkg_name = ' CSC_PROF_PARTY_SQL_CUHK '
AND api_name = 'GET_PARTY_SQL_PRE'
AND processing_type = 'B'
AND user_hook_type = 'C'
```

   Note: Note: After the user hook is enabled, the custom code written in CSC_PROF_PARTY_SQL_CUHK specifies which parties the profile engine selects irrespective of the entry you make in the Party Name concurrent program parameter.

Sample Procedure

Here is a sample procedure a cell phone provider can use to evaluate the billing information for the most recent customers who purchased a particular plan. This example assumes that the plan information is stored in ATTRIBUTE1 of HZ_PARTIES.

```
CREATE OR REPLACE PACKAGE BODY CSC_PROF_PARTY_SQL_CUHK AS
procedure Get_Party_Sql_Pre( p_ref_cur    OUT NOCOPY
csc_utils.Party_Ref_Cur_Type) IS
l_sql varchar2(2000);
l_filter_condition varchar2(100);
BEGIN
l_sql := 'SELECT party_id FROM hz_parties where creation_date <=
sysdate-3 and attribute1='Plan-699';
OPEN p_ref_cur FOR l_sql;
END Get_Party_Sql_Pre;
END CSC_PROF_PARTY_SQL_CUHK;
```

Setting Automatic Refresh of Profiles on the Dashboard

You can have the application automatically recalculate all or only the key customer profile values whenever the agent displays a customer record by setting the profile option Customer Care: Permit the Dashboard to be Refreshed Automatically.

To enable or disable the automatic refresh of customer profiles:

1. Under the Service responsibility, navigate to Others, Profile System Values.

2. Using the Query by Example method, display the Customer Care: Permit the Dashboard to be Refreshed Automatically system profile.

   The available settings are:

   - Just in Time - Full

     The application updates all profile values when the agent queries a new customer or clicks Refresh or when you run the Customer Profile Engine concurrent program.

   - Just in Time - Key

     The application updates only the key profile values when the agent queries a new customer. The application updates all values only when the agent clicks Refresh or when the Customer Profile Engine concurrent program is run.

   - No (the default setting)

     The profile values are updated only when the agent clicks the Refresh button or runs the Customer Profile Engine concurrent program.

   - Screen Pop

     Do not use this setting. It is available for legacy reasons only.

3. If you set the value of the system profile Customer Care: Permit the Dashboard to be Refreshed Automatically to Just In Time - Key or Just In Time - Full, then you must set the following system profiles for JIT processing in the telephony mode. The setting is not required for the nontelephony mode.

   - Customer Care: Permit the Dashboard to be Refreshed Automatically
   - Customer Care: Default View by in Contact Center
   - Service: Default Customer Name
   - Customer Care: Default Dashboard Display by Customer or Account
   - Customer Care: Display Only Active Accounts in Contact Center
   - Customer Care: Default the First Customer Account in Contact Center Header
   - Customer Care: Default Contact Type for Contact Center

   You must set these system profiles at the responsibility level to process parties

passed from the Oracle Telephony Manager. The application ignores any settings at the User level.

4. Set the system profile Customer Care: Run the Profile Engine to process the profile checks for contacts at batch mode to Yes to enable the engine to calculate contact-specific profile checks.

Customizing Dashboard Displays by Customer Attributes

By default, the application permits you to create different views of customer information for each responsibility, customer type (consumer or business), and application (Contact Center or Oracle TeleSales' E-Business Center).

If you prefer to display different customer information to agents depending on a customer attributes, such as geographical location or product ownership type, then you can instead use a user hook described in this topic. For example, a cell phone service provider can use this feature to create different views for customers with prepaid plans and those with pay-as-you-go plans.

Prerequisites:

What information gets displayed in the Dashboard tab depends on the dashboard group specified by your procedure. This means you must create the dashboard groups and their profile checks first.

To customize dashboard displays using the user hook:

1. Create a package body with the name CSC_DASHBOARD_GROUP_CUHK.

   This package must return the dashboard GROUP_ID.

2. Run the following script to enable the user hook:

```
UPDATE jtf_user_hooks SET execute_flag = 'Y'
WHERE pkg_name = 'CSC_DASHBOARD_GROUP_CUHK'
AND api_name = 'GET_DASHBOARD_GROUP_PRE'
AND processing_type = 'B'
AND user_hook_type = 'C'
```

> **Note:** After the user hook is enabled, the custom code written in CSC_DASHBOARD_GROUP_CUHK is the only code executed to specify which dashboard group displays in the Dashboard tab. This means the application ignores any mapping between dashboard groups, responsibilities, customer types, and application modules.

Sample Procedure

Here is a sample procedure a cell phone provider may use to display different customer views based on customer connection type. The connection information is stored in the party information descriptive flexfield which is displayed in the

Contact Center header. You can use any of the customer or contract information from the header for your procedure.

```
CREATE OR REPLACE PACKAGE BODY CSC_DASHBOARD_GROUP_CUHK AS
PROCEDURE Get_DashBoard_Group_Pre( P_PARTY_REC IN OUT NOCOPY
csc_utils.dashboard_Rec_Type)
IS
/*   The Party Information descriptive flex field has been setup to
store
-- connection type information in Attribute2 column of hz_parties.
--   Connection Type is used to decide which dashboard group is
--   returned by the custom hook
*/
  l_party_id NUMBER;
 l_connection_type VARCHAR2(240);
BEGIN
 l_party_id := p_party_rec.cust_party_id;
 l_connection_type := p_party_rec.cust_attribute2;
/* Custom Hook can be called from JIT process or from Contact
Center.

-- When it is called from Contact Center, Connection Type info is
passed though cust_attribute2.
-- When called from JIT, this info will not be passed. So, get this
info from hz_parties
*/
   IF l_party_id IS NOT NULL AND l_connection_type IS NULL THEN
  INTO l_connection_type
       FROM hz_parties
       WHERE party_id = l_party_id;
  END IF;
   IF UPPER(l_connection_type) = 'PRE-PAID' THEN
      p_party_rec.group_id := 1594;
   ELSIF UPPER(l_connection_type) = 'POST-PAID' THEN
      p_party_rec.group_id := 1595;
   ELSE
      /* return the default dashboard group */
   END IF;
END Get_DashBoard_Group_Pre;
END CSC_DASHBOARD_GROUP_CUHK;
```

23

Setting Up Relationship Plans

This chapter covers the following topics:

- About Relationship Plans
- Relationship Plan Components
- Process Overview of Relationship Plan Setup
- Defining Plan Groups
- Defining an Action
- Setting Up Messages and Scripts for Association with Relationship Plans
- Defining Messages
- Generating Messages
- Creating the Relationship Plan
- Creating a Condition for the Relationship Plan
- Adding or Modifying Relationship Plan Conditions
- Enabling Relationship Plans in Application Modules
- Running the Relationship Plan Assignment Engine
- Modifying Relationship Plan Lookups

About Relationship Plans

Relationship plans make it possible for your organization to deliver personalized and proactive customer service by alerting agents to customer needs. Whenever an agent is working on a customer record that meets the conditions you specify, the application can automatically display an alert message or launch a script that guides the agent through the interaction with the customer.

Relationship plans can trigger alerts and scripts for agents working in the Contact Center and Service Request modules in Oracle TeleService and in the E-Business Center

window for Oracle TeleSales.

A relationship plan is a process which runs in the background periodically checking which customers meet one or more conditions you specify. Here are two examples:

- Plan A

  If a customer contract is to expire in five days, then alert the agent with a message.

- Plan B

  If a customer has ten or more open high-priority service requests, then check if the customer has orders of $1 million or more.

  For customers with orders above $1 million, launch a script that guides the agent in handling the customer call.

  For customers below that threshold, alert the agent with a message.

Determining what action to take is a two-step process. The relationship plan first evaluates if a customer qualifies for the plan and then determines the action to be taken.

If your plan includes only one condition, then all customers that meet the condition qualify for the plan. For Plan A, that means alerting agents for all qualifying customers.

Different actions can be taken for different subsets of customers who qualify. Plan B first decides which customers qualify for the plan by checking, which have ten or more high-priority open service requests.

The plan evaluates the qualifying customers using two or more conditions and takes different actions for those customers who meet them:

- If a customer has orders of less than $1 million, the plan displays an alert.

- If a customer has orders of more than $1 million, the plan displays a script.

Relationship Plan Components

Relationship plan implementation involves many steps in multiple modules. You must create a mechanism to decide which customers belong to your plan, for example, and you must also create the actions, the messages, and the scripts, you wish the plan to display. The relationship plan itself (Navigation: Click Setup, then Relationship Plans, and then select Define Relationship Plans) brings all the pieces together.

This section highlights the different types of setups you need to complete. A later section gives a process overview of the actual setup steps themselves.

Monitoring the Database of Customers

To assign your customers to relationship plans automatically, you must set up a way to monitor the database to see if any customers qualify. For Plan A this means finding customers with expiring contracts. For Plan B, finding customers with high priority

service requests.

This involves setting up a Profile Check that retrieves and summarizes customer data based on the SQL query you enter. The Customer Profile Engine concurrent program refreshes this data at the periods you specify. See Setting up Customer Profiles, page 22-2.

Evaluating if Customers Qualify for the Plan

Now that you are collecting data on your customers, you must create the condition that evaluates the data tracked by the profile check and determines if a specific customer qualifies for the relationship plan. Does the customer have more than one open high-priority service request? Does the customer have more than five expiring service contracts?

Enter the qualifying condition in the relationship plan itself. It is evaluated by the concurrent program Relationship Plan Assignment Engine. If any customers meet the condition, then they qualify for the plan.

Setting Up the Actions the Plan Takes

A relationship plan can take different actions on subsets of the qualifying customers. Now that you have assigned customers to the plan, you are ready to determine what actions you wish the plan to take for which customers.

You must define the actions and conditions separately.

For Plan B, create two conditions:

- Condition B1: If a customer has orders of less than $1 million
- Condition B2: If a customer has orders of more than $1 million

Then create two actions:

- Action B1: Display alert.
- Action B2: Display Script

Plan A does not evaluate any additional condition because it displays an alert for all customers who qualify, however, you must still create one because conditions are the only way to trigger an action:

- Condition A1: <header information only>

You must also create the action for Plan A:

- Action A1: Display alert message that the contract is about to expire.

Please note that the action setup uses a user interface provided by Oracle Contracts, which includes additional functionality you do not need to use for relationship plans.

Setting Up Messages or Scripts

You must also set up the alert messages and scripts you want to display for different actions your plan takes.

You set up the Messages in the Messages window under the Application Developer Responsibility and compile them by running the Generate Messages concurrent program. Messages are similar to the standard application messages used by all Oracle applications and are completely described in the *Oracle E-Business Suite Developer's Guide*.

You must create your scripts using Oracle Scripting as described in that E-Business Suite documentation.

Hooking Up the Conditions to the Actions

When you create conditions of your relationship plan, you cannot directly specify the alert messages and scripts that the conditions are to launch. First, you must indirectly make this link by defining an "Outcome" for each script and message. Secondly, to create an outcome, you must define the script or message as a Process Definition of the type Outcome and then use the name of this process definition to create the link with the condition that triggers it.

Process Overview of Relationship Plan Setup

Follow the steps given below to implement relationship plans:

1. Log in to Oracle applications under the Service responsibility.

2. Set up profile checks that retrieve and summarize your customer data. You can use one of the profile checks you set up to display key customer information for agents as part of Customer Profile setup. If you do need to create a profile check specifically for relationship plans, then you must complete at least the following steps:

    1. Navigate to Setup, then Customer Management, and select Customer Profiles.

    2. On the Profile Variables tab, define the variable you wish to use in your profile check. This is where you enter the SQL queries. You can use the same variable in multiple profile checks. See Defining Profile Check Variables, page 22-11.

    3. On the Profile Checks tab, define the profile check. See Defining Profile Checks, page 22-17.

3. Navigate to Setup, then Relationship Plans, then Events, and select Define Action and set up one action for every condition in the relationship plan. Every relationship plan must have at least one action. On the Basic tab, you must define

all variables you want to use for your condition and every token that you wish to use in an alert message. See Defining an Action, page 23-7.

4. To have your relationship plan display an alert message, you must:

    1. Under the Application Developer Responsibility, navigate to Application, Messages.

    2. Define all messages as described in Defining Messages, page 23-11. The name of the message must be identical (including capitalization) to the name of the action as this is the only link between the two. For displaying customer information, such as the customer name, in the text of the message you are limited to using only the tokens you have defined in the Action window in the previous step.

    3. Generate the messages (Other, Requests, Run) by running the Generate Messages concurrent program. See Generating Messages, page 23-12.

5. To have your relationship plan display a script, then prepare the script as described in Oracle Scripting documentation and note down its name. You can obtain this from the Name field of the Script Properties window in the script author's file.

6. You have now created the actions your relationship plan takes, but you cannot hook them up to the relationship plan just yet. You must first create an intermediary called a Process Definition of type Outcome. It is this process definition or "Outcome" and not the action itself that you associate with the relationship plan conditions that launch them.

    To create the outcome:

    1. Switch to the Service responsibility and navigate to Setup, Relationship Plans, Events, Define Process Definition.

    2. Create the outcomes for the conditions according to the steps outlined in Setting Up Messages and Scripts for Association with Relationship Plans, page 23-9.

7. To organize your relationship plans in categories, navigate to Setup, then Relationship Plans, and select Define Plan Groups, and define these categories as described in Defining Plan Groups, page 23-6.

8. You are now ready to create the relationship plan itself which ties together all of the setups you have done so far. In this step you enter both the condition that determines, which customers qualify for the plan and the other conditions that decide the action to be taken. The setup is done in the New Plan window (Setup, then Relationship Plans, and select Define Relationship Plans). For details, see:

    - Creating a relationship plan, page 23-13

- Creating a condition for the relationship plan, page 23-16

9. You must enable your plan for any of the forms where you wish the actions to appear. Navigate to Setup, then Relationship Plans, and select Enable Relationship Plans) and enable forms as described in Enabling Relationship Plans, page 23-20. The options are: Contact Center, Service Request, and the E-Business Center from Oracle TeleSales.

10. As a last step, run the concurrent program Relationship Plan Assignment Engine to assign customers to your plan. See Running the Relationship Plan Assignment Engine, page 23-21.

Defining Plan Groups

Use this procedure to organize your relationship plans into logical groups. Defining plan groups is optional.

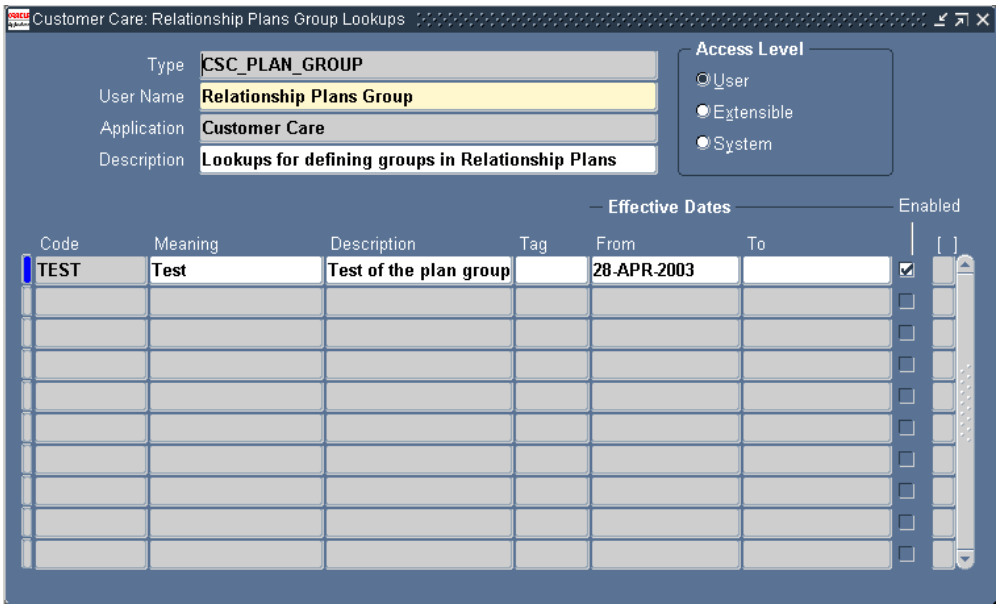
Prerequisites:

None.

To define relationship plan groups:

1. Under the Service responsibility, navigate to Setup, then Relationship Plans, and select Define Plan Groups.

   The Relationship Plans Group Lookup window appears.



2. In a new row, enter a value in the Code field.
3. Enter the Meaning.
4. Enter the Description.
5. The Tag field is not used in Oracle Support.
6. Optionally enter dates in the From and To fields.
7. Save your plan group.

Defining an Action

Use this procedure to define the action the application takes when the relationship plan applies to a particular customer.

To display an alert message for agents as your action, you must define any tokens you wish to use in the message text in the Element Name field of the Basic tab. For example, to include the customer's name in the alert message, you must enter `CUST_PARTY_NAME`.

> **Note:** You must enter the same token name when you set up condition to trigger this action. See Creating a Condition for the Relationship Plan, page 23-16.

If the action you are defining is triggered by evaluating a relationship plan condition,

then you must also define the variable you are using for the condition. If your relationship plan contains a condition that takes this action based on the city where the customer is located, then in the Basic tab you must enter the variable `CITY`.

To view the available list of variables/tokens you can query up the action with the name `Customer Care - Generic Action` or refer to the Seed Data for Relationship Plans appendix of this guide.

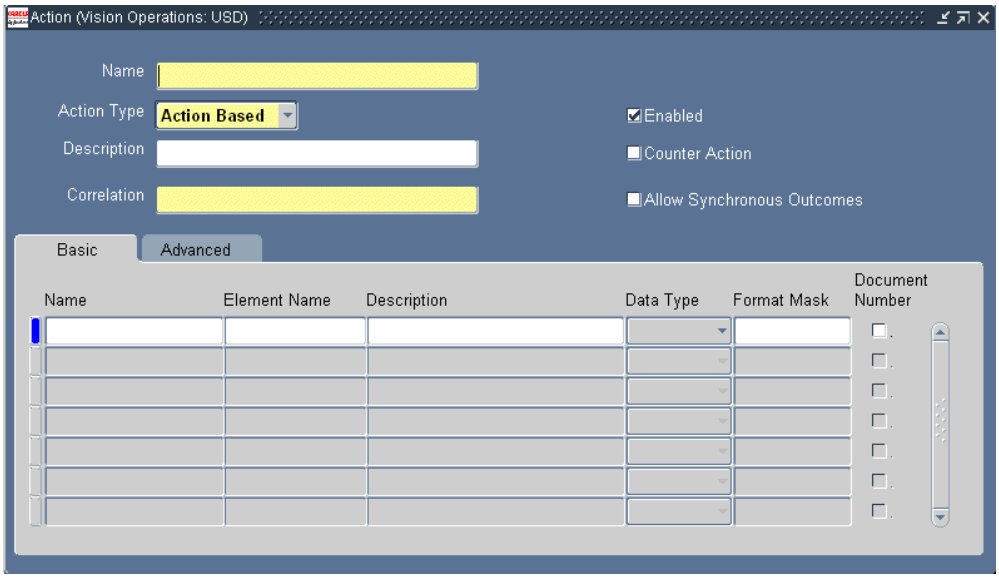
Prerequisites:

None.

To define an action:

1. Under the Service responsibility, navigate to Setup, then Relationship Plans, and select Events, Define Action.

   The Action window appears.



2. Enter a name for your action in the Name field.

3. Select **Action Based** from the Action Type list. Date Based is not supported.

4. Optionally enter a description of your action in the Description field.

5. In the Correlation field, enter `CSC_CONTACT_CENTER`. This is the only valid name you can use for relationship plans.

6. Select the Enabled check box to make this action available for use.

7. Select the Allow Synchronous Outcomes check box to allow a real-time alert or script to pop up.

8. If your action displays an alert message, then in the Basic tab, enter any tokens you want to use in the message:

   Note: You need not define any tokens for generic messages that apply to all customers.

   1. In Element Name, enter a valid variable name.

      You can obtain the list of valid Contact Center header variable names by querying up the `Customer Care - Generic Action` or from Appendix B of this guide.

      For example, to display the full name of the customer in the alert message, enter `CUST_PARTY_NAME.`

      You must also enter the same value in two other places: in the text of the message when you define the message in the Messages window and in the Parameters window when defining the condition that uses this action.

   2. You can enter the same value in the Name field as in the Element Name field.

   3. Optionally, enter a description in the Description field.

   4. Select a data type of CHAR, NUMBER, or DATE in the Data Type field.

   5. Select a format mask, if appropriate.

9. If your action is triggered by a condition that evaluates a variable, then define the variable in the Basic tab in the same manner as the message tokens above.

10. Save your action.

Setting Up Messages and Scripts for Association with Relationship Plans

You can indicate the script or message your relationship plan is suppose to launch only indirectly by first creating a Process Definition of type Outcome. The name of this process definition, or outcome, rather than the name of the message or script itself, is associated with the condition of the relationship plan.

Prerequisites:

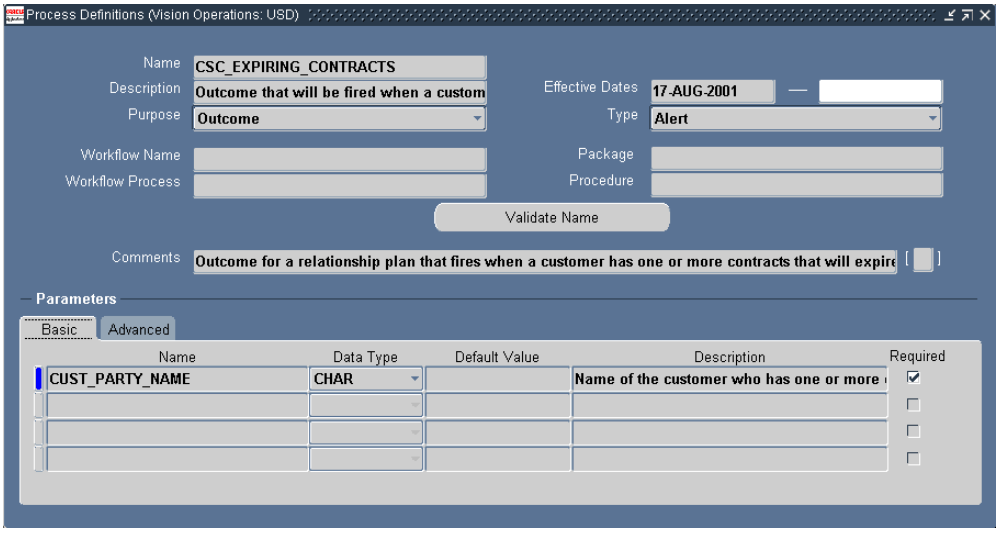
- You must create the action, message, and script first.
- For Scripts, you must know the name of the script. You can obtain this from the Name field of the Script Properties window. You can open this window from the script author's file.
- For messages, you must know:

- The value you entered in the Name field of the Messages window.
- The values you entered for the individual message tokens used by the message. (These were entered on the Basic tab of the Action window in the Element Name fields.)

To define process definitions of type outcome:

1. Under the Service responsibility, navigate to Setup, then Relationship Plans, then Events, and select Define Process Definitions.

   The Process Definitions window opens.



2. In the Name field, enter the name of the script or message.
3. Optionally, enter a description in the Description field.
4. Select **Outcome** from the Purpose list. This is the only permitted value.
5. From the Type list, select either Alert or Script. The other types are not supported.
6. Optionally enter comments in the Comments field.
7. If you are creating the outcome for a message, then in the Name fields of the Basic tab of the Parameters region, enter the same values you entered for Element Name fields on the Basic tab of the Action window.
8. The Data Type field defaults to the data type of the Element Name.
9. Save your process definition.

Defining Messages

Messages are defined for use in displaying messages about customers in real-time alerts. Use the procedure given below to define alert messages the agents will see.

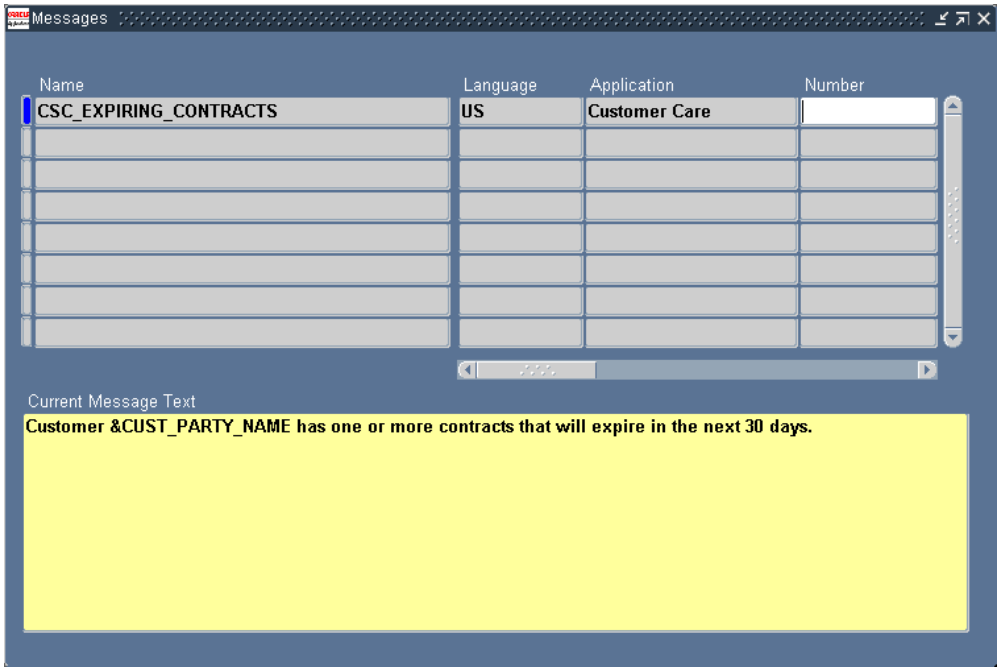
Prerequisites:

None

To define messages:

1. Under the Application Developer Responsibility, navigate to Application, and select Messages.

   The Messages window opens.



2. Enter a name for your message in the Name field. The name of the message must be identical (including capitalization) to the name of the action as this is the only link between the two. You must also use the same name when you create a Process Definition.

3. Select a language from the Language LOV.

4. Select `Customer Care` from the Application LOV to display the message in the Contact Center or `Service` to display it in the Service Request window, Customer Support, and Service Desk.

   Entry in the remaining fields, Number, Type, Maximum Length and Description,

are optional.

5. In the Current Message Text field, enter the message to display as a real time alert.

   To display the value of a token, for example, the customer name `CUST_PARTY_NAME`, you must enter the token preceded with an ampersand symbol, for example, `&CUST_PARTY_NAME`.

   You are restricted to using only the tokens that you have entered in the Element Name fields in the Action window. See Defining an Action, page 23-7.

6. Save your message.

Generating Messages

Use this procedure to generate the messages you have created.

To generate messages:

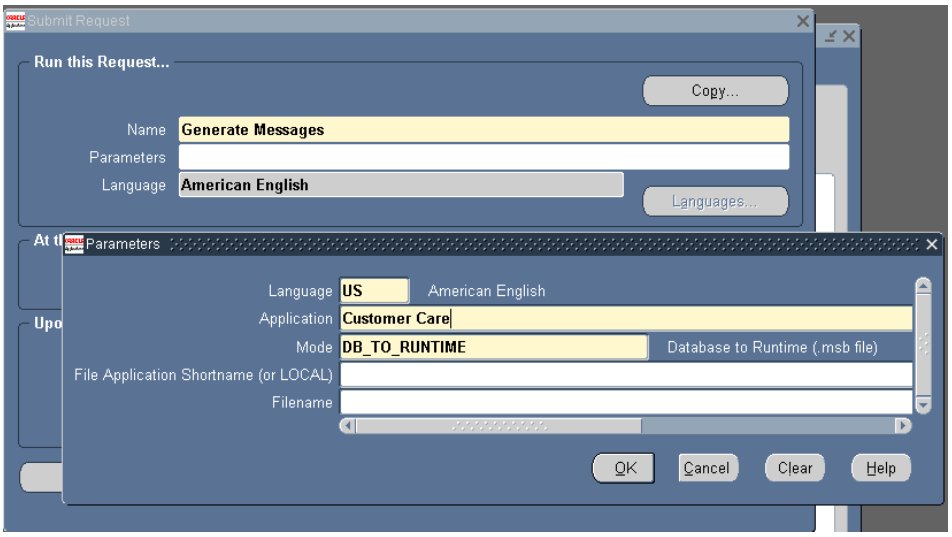
1. Under the Application Developer Responsibility, navigate to Other, then Requests, and select Run.

2. Select the Single Request option in the Submit a New Request window and click **OK**.

3. Select Generate Messages from the Name list of values.

4. In the Parameters window enter:

   - Language: `US` or another message language
   - Application: `Customer Care`
   - Mode: `DB_TO_RUNTIME`



5. Click **OK** to close the Parameters window.

6. Click **Submit**.

7. Click **No** to submit another request.

8. You can view the status of your requests by navigating to View, then Requests, then All My Requests, and click Find

Creating the Relationship Plan

Use this procedure to create the relationship plan. You must enter the condition that determines whether customers qualify for the plan and also the conditions that decide the action to be taken.

Oracle Support provides a predefined relationship plan, Expiring Contracts, which displays an alert when a customer has any contracts that expire in the next 30 calendar days. This relationship plan uses the profile check called Expiring Contracts. Refer to Appendix B for more details about the predefined relationship plan.

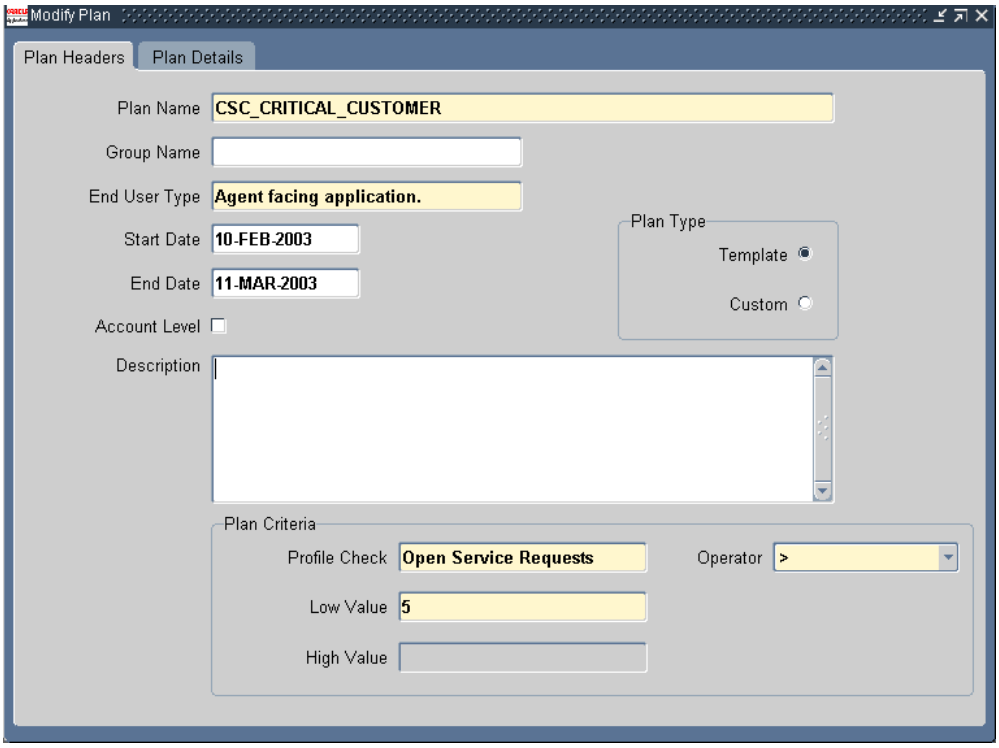
Prerequisites:

You must have defined the actions, process definitions, messages, and scripts.

To define the plan:

1. Under the Service responsibility, navigate to Setup, then Relationship Plans, and select Define Relationship Plans.

   The New Plan window appears. (When you are modifying the plan, the name of this window changes to Modify Plan, but the functionality is the same.)



2. In the Plan Headers tab, enter a name for the plan in the Name field.

3. Select a group name from the LOV to group the relationship using relationship plan categories.

4. Optionally, enter start and end dates for the relationship plan.

5. Unless you want to create a plan for individual accounts rather than for customers, do not select the Account Level check box. For example, an account relationship plan can track customers who generate a significant amount of revenue in one account.

6. All relationship plans are initially created from a template, so the Template option is selected by default in the Plan Type section. The Custom option can be used only from the Inquiry tab when you customize a relationship plan for one specific customer.

7. Enter a description of the Relationship Plan in the Description field.

    1. In the Plan Criteria section, you define the criteria to be used by the Relationship Plan Assignment Engine to decide which customers qualify for the plan:

    2. Using the Profile Check list of values, select the profile check that summarizes

the customer information you wish to evaluate. This window displays predefined profile checks as well as those you have defined.

3. Select an operator from the Operator LOV. The choices are =, <, >, >=. <=, Between, and Not Between.

4. Enter the constant in the Low Value field.

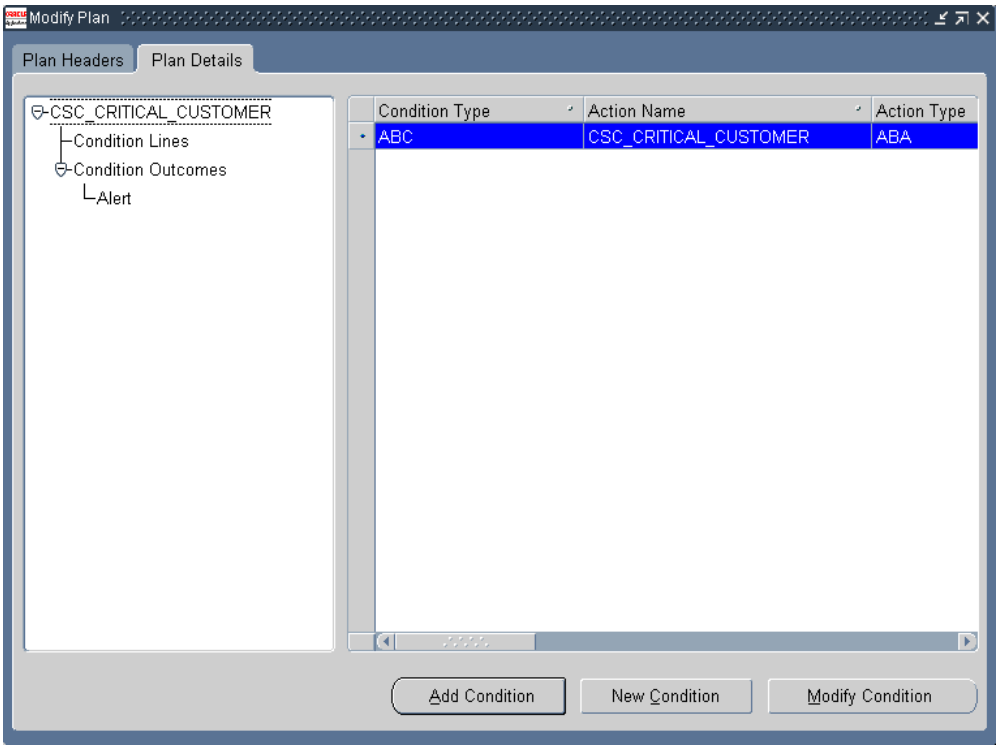
5. The high value is available only if you previously selected an operator value of Between or Not Between.

8. Save your relationship plan.

   You are now ready to specify the actions the relationship plan is to take and any additional conditions to trigger them.

   > **Note:** To have the relationship plan display an alert message or script for all customers who qualify, you must still create a new condition for each action you want the plan to take. Conditions provide the only way to specify which actions the plan takeq. If you want all qualifying customers to trigger the action, you leave the expression tab blank.

9. Select the Plan Details tab.



10. Click **New Condition** to create a new condition to trigger one of the actions as described in Creating a Condition for the Relationship Plan, page 23-16.

Creating a Condition for the Relationship Plan

Use this procedure to create a condition for the relationship plan. Each relationship plan must have at least one condition attached to it.

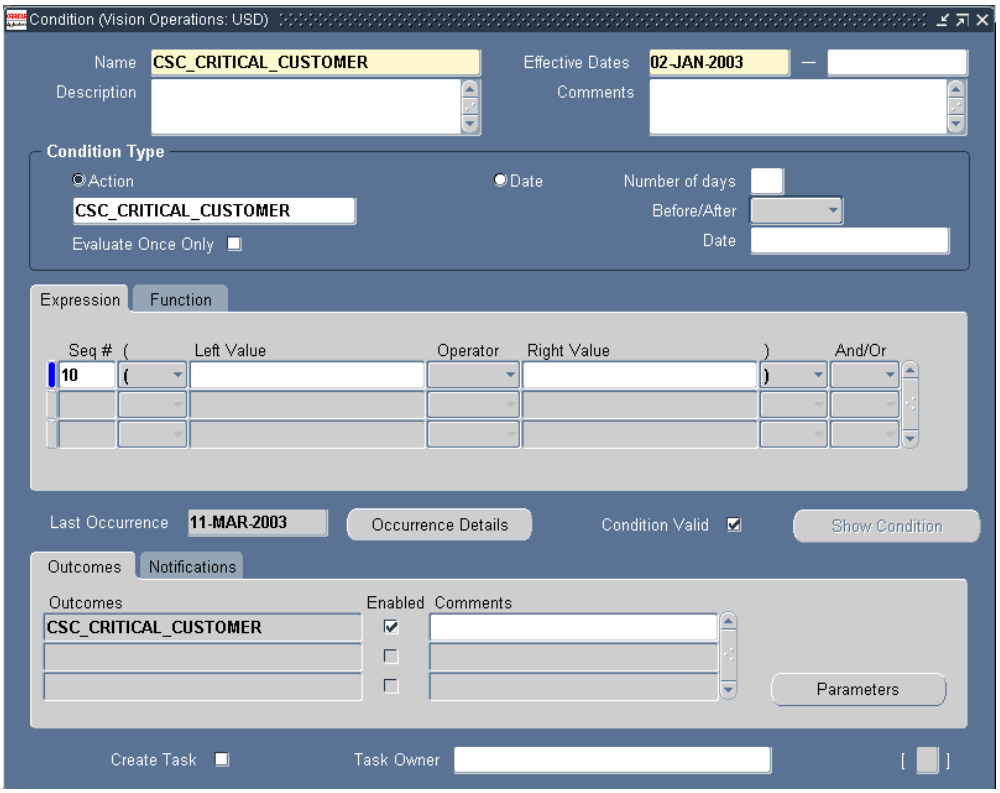
Prerequisites:

You must create the relationship plan itself before adding conditions.

To create a condition for a relationship plan:

1. Under the Service responsibility, navigate to Setup, then Relationship Plans, and select Define Relationship Plans.
2. Display the relationship plan where you want to create a condition.
3. Select the Plan Details tab.
4. Click **New Condition**

   The Condition window appears.



5. Enter a name for the condition in the Name field.

6. Optionally, enter effective dates, description, and comments for the condition.

7. In the Condition Type region, select the Action option. The Date condition type is not supported in relationship plans.

8. Select an action from the Action LOV. The list of values contains actions that you previously defined. You must use a unique action for every relationship plan.

9. Don not select the Evaluate Only Once check box unless you want to evaluate your condition only once.

10. In the Outcomes region, use the Outcomes LOV to select the outcome, which represents the message or script you wantto display for customers matching this condition.

    A relationship plan can display a message, a script, or both.

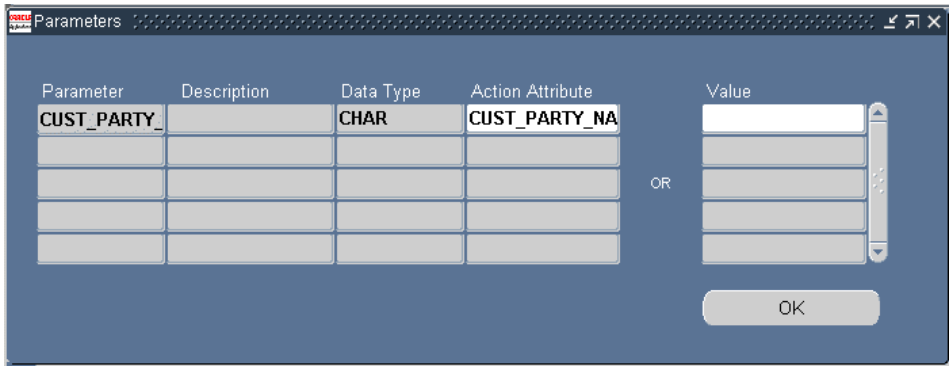
    Outcomes, are the intermediaries which permit you to associate scripts and messages with relationship plans. They are defined in the Process Definitions window as described in Setting Up Messages and Scripts for Association with Relationship Plans, page 23-9.

11. If the outcome is a message that displays the value of one or more tokens, such as the customer's name, then you must reenter the same message tokens:

    1. Click **Parameters**.

       The Parameters window appears.

       > **Note:** If you have defined more than one outcome for this condition, then the application displays a different window. In this case you must first:
       >
       > - Select the parameter you wish to define.
       > - Right click and select **Populate selected rows in PARAMETERS** from the menu.



    2. Select the token from the Action Attribute list of values.

       For example, if you are displaying the customer name in the body of the message then you must select `CUST_PARTY_NAME` in the Action Attribute.

       > **Note:** You may want the value in the Parameter and Action Attributes fields to be the same. But you are permitted to assign different values to the token in your message provided they are of the same data type. For example, to display the customer name in the message, you can map the full customer name, the first name, or the last name to that token using this window.

    3. Click **OK** to return to the Conditions window.

12. Enter the condition that triggers the action, in the Expression tab. You can use the parameters you have just mapped.

13. Save the condition.

Adding or Modifying Relationship Plan Conditions

Use this procedure to modify relationship plan conditions. You can add additional conditions to an existing plan or modify a condition already attached to your plan.

Prerequisites:

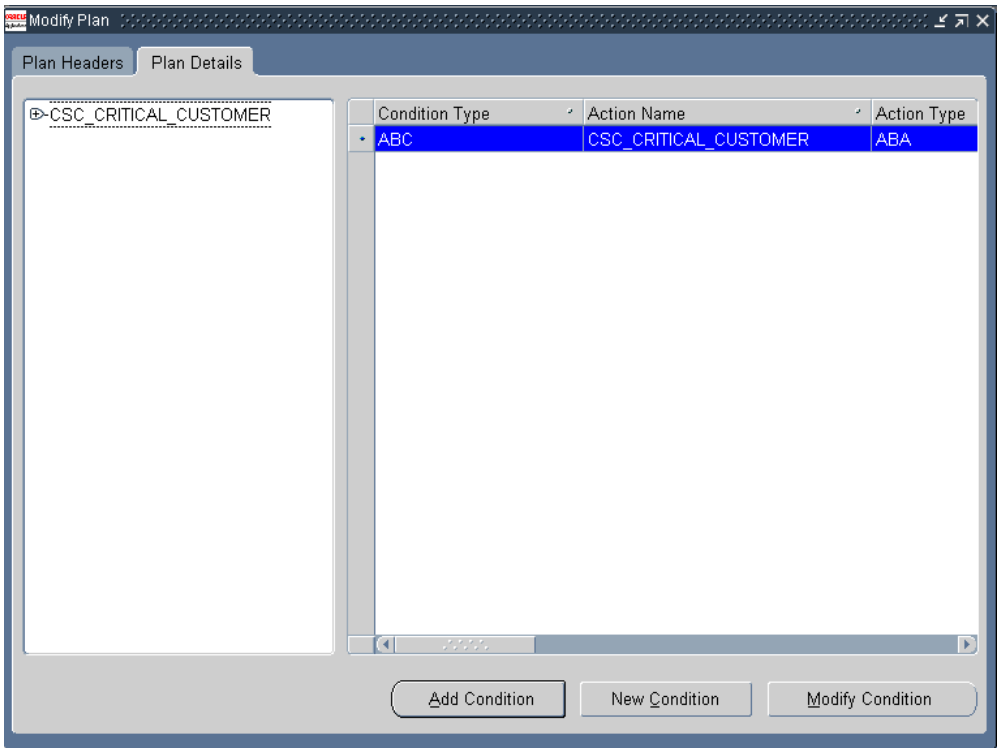
You must define a relationship plan first.

To add or modify relationship plan conditions:

1. Under the Service relationship, navigate to Setup, then Relationship Plans, and select Define Relationship Plans.

2. Display the Relationship Plan to which you want to add condition lines.

3. Select the Plan Details tab in the Modify Plan window.



4. Click **Add Condition**.

5. Select a condition and click **OK** to attach it to the plan header.

6. To modify a condition line of a relationship plan:

    1. Click **Modify Condition** in the Plan Details window.

2. Make the necessary changes to the condition line or outcome.

3. Save the modified condition line.

Enabling Relationship Plans in Application Modules

Use this procedure to enable relationship plans in different application modules: in the Contact Center and the Service Request and in the E-Business Center of Oracle TeleSales.

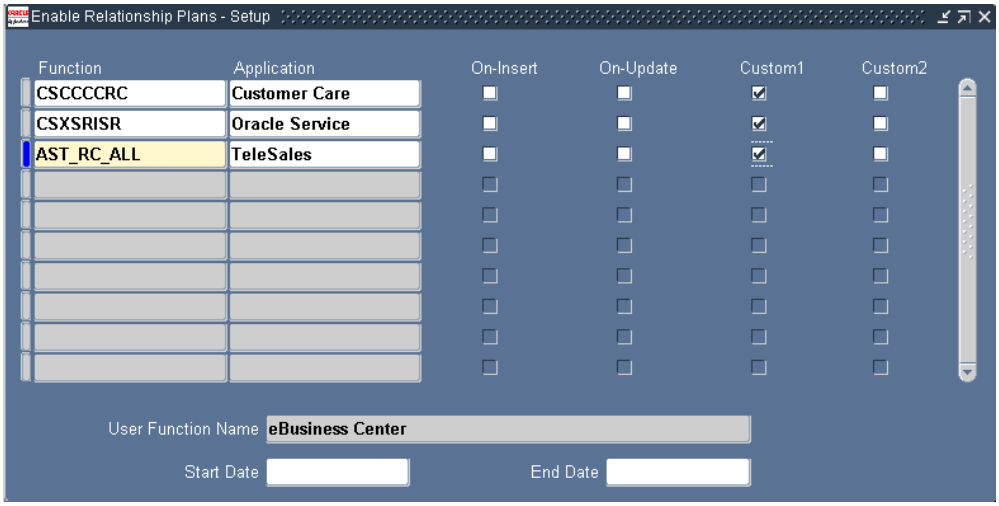
Prerequisites:

None.

To enable relationship plans:

1. Under the Service responsibility, navigate to Setup, then Relationship Plans, and select Enable Relationship Plans.

   The Enable Relationship Plans - Setup window appears.



2. The Function list of values displays all forms, but you must select one of the three following forms:

   - CSCCCCRC for Contact Center
   - CSXSRIXSR for Service Request
   - AST_RC_ALL for E-Business Center

3. Save your settings.

Note: Please see the appendix, Enabling Relationship Plans, for additional information.

Running the Relationship Plan Assignment Engine

The Relationship Plan Assignment Engine is a server side PL/SQL concurrent program. You must run the Relationship Plan Assignment Engine after completing the relationship plan setup process so that all associations between customers and relationship plans are made.

This concurrent program also runs automatically each time you run the Customer Profile Engine.

The Relationship Plan Assignment Engine performs the following operations:

- Evaluates all customers that meet relationship plan criteria and associates the customers with the appropriate relationship plan.
- Evaluates all customers that do not meet relationship plan criteria and disassociates the customer from the relationship plan.
- Checks for all customers who have been manually assigned to relationship plans and ignores automatic association/disassociation rules for these customers.

The following parameters are available for running the Relationship Plan Assignment Engine:

- Plan Name
- Check Name
- Party Name
- Account Name

Note: Plan Name and Check Name are required parameters

Each parameter provides a list of values from which to choose. If you enter a value in the Party Name parameter, then the Account Name list of values contains only those values for the selected Party Name. If no Party Name is selected, the Account Name list of values displays all accounts.

You can initiate the Relationship Plan Assignment Engine in two ways:

- Run the concurrent program using the Concurrent Program submission user interface.

- Let it run automatically whenever the customer profiles are updated by the Customer Profile Engine.

  Customer profiles can be updated by running the Customer Profile Engine as a concurrent program or by selecting Refresh on the Dashboard tab.

Modifying Relationship Plan Lookups

The lookups described in this section make it possible for you to modify different lists of values for relationship plan setup.

- Group Names for relationship plans

  You can modify any of the meaning fields in the lookup described in the following table. It controls the list of values for the Group Name field.

Lookup Type	Meaning	Lookup Codes	Meaning	Level
CSC_PLAN_GROUP	Relationship Plans Group	GROUP1	Plan Group1	User
		GROUP2	Plan Group2	
		GROUP3	Plan Group3	

- Group Names for relationship plans

  You can modify any of the meaning fields in the lookup described in the following table. It controls the list of values for the Group Name field.

Lookup Type	Meaning	Lookup Codes	Meaning	Level
CSC_PLAN_STATUS	Relationship Plans Status	APPLIED	Applied	User
		DISABLED	Disabled	
		ENABLED	Enabled	
		MERGED	Merged	
		REMOVED	Removed	
		TRANSFERED	Transferred	

24

Setting Up Web Collaboration

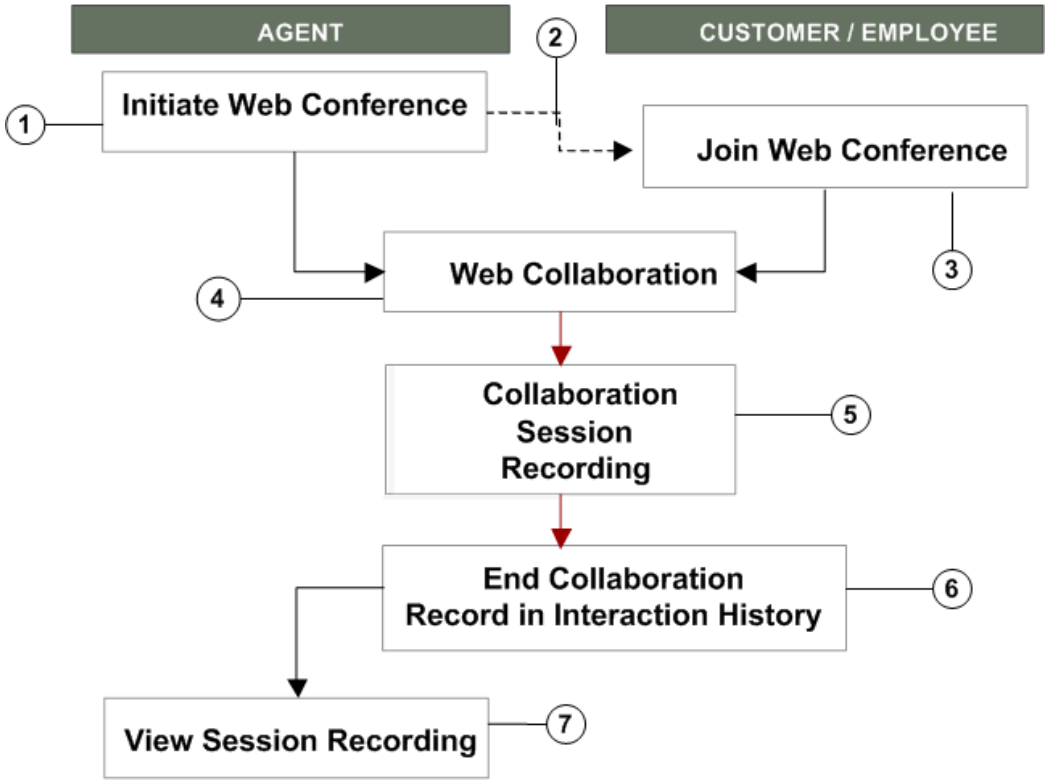
This chapter covers the following topics:

- Web Collaboration Overview
- Setting Up Web Collaboration

Web Collaboration Overview

By enabling real time collaboration features of the Oracle Collaboration Suite in Service Request or Case Management modules, you can make it possible for agents and customers to participate in Web conferences, chats, and share their computer desktops. Agents can use this capability to take control of the customer's computer and provide remote support.

Agents can record Web conferences and publish them for colleagues and customers to review.



1. The agent initiates the Web conference.

   In all Oracle TeleService modules except for the Contact Center, the Web conference takes place in the context of a service request. This means the agent can initiate the Web collaboration only after opening an existing service request.

   In the Contact Center, the conference can be initiated in the context of the service request displayed in the Service Request tab or in the context of the customer displayed on the other customer information tabs.

   The agent procedures are slightly different in different modules:

   - In Oracle TeleService's Service Request and Contact Center windows, the agent chooses **Start Conference** from the Tools menu.

   - In Customer Support, Service Desk, and Case Management, the agent initiates the conference in the Update Service Request page by choosing **Start Conference** from the Actions drop down list and clicking **Go**.

2. The application automatically generates a conference ID and key.

3. Customers who have an account on the self-service Oracle iSupport Web portal can join the conference by clicking the "Join Active Conference" link on the home page. Others must be given the conference information by the agent and enter it either on an Oracle iSupport page or on a Oracle Conference page.

4. Agent and customers or employees collaborate in real time.

5. Optionally, the agent can record the collaboration session.

6. After the agent ends the collaboration session, the application records the event in interaction history for the service request.

7. Agents can access the conference information and any recording made during the session.

   In Service Request and Contact Center windows, agents view this information on the Interactions tab. In Customer Support, Service Desk, and Case Management it is available in the History tab.

   Agents can choose to publish the Web conference recordings so that they are visible in Oracle iSupport.

Setting Up Web Collaboration

Use this procedure to set up Web collaboration for Oracle TeleService.

Prerequisites:

You must set up Oracle Real Time Collaboration Server as described in *Oracle Real-Time Collaboration Administrator's Guide.*

To set up Web collaboration:

1. Set up the following system profiles:

   - Service: Web Conference Host

     Enter the web conference server host URL. For example: `http://collabtng03.us.oracle.com`.

   - Service: Web Conference Site ID

     Enter the site ID assigned by the Web conference server. Different groups of users may be assigned to different sites.

   - Service: Web Conference Site Authentication Token

     Enter the authentication token assigned to the site by the Web conference server.

     Note: The site ID and the authentication token must be synchronized for the Web conference site.

   - Service: Web Conference Active Status Duration

Enter how many minutes you want the Web conference to remain active for attendees to join.

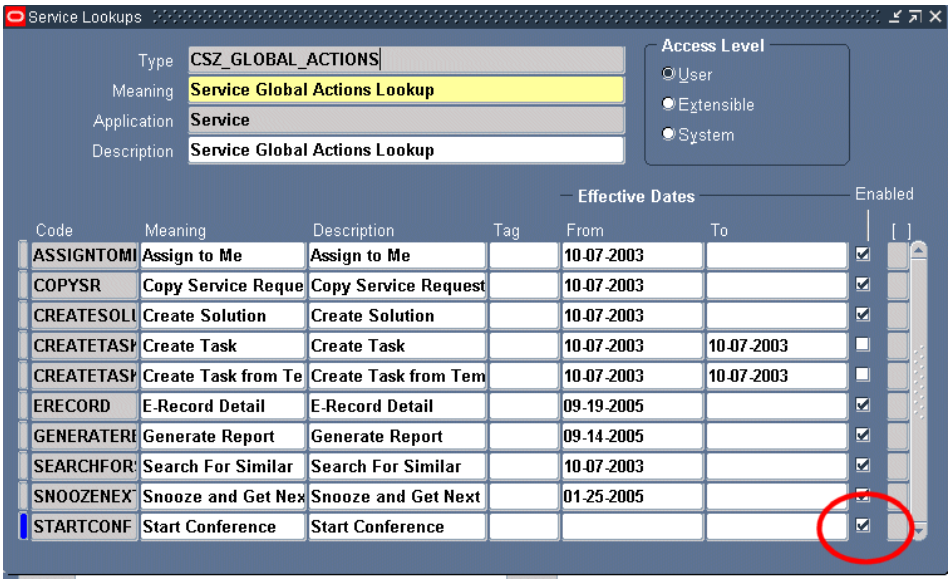
2. For Customer Support, Service Desk, and Case Management, enable the STARTCONF lookup code for your application:

    1. Navigate to Setup, and select Customer Support Lookups.

    2. Use the View, Query by Example method to display the lookup type appropriate for your application:

Application	Lookup Type
Customer Support	CSZ_GLOBAL_ACTIONS
Case Management	CSZ_GLOBAL_ACTIONS_CASE
Service Desk	CSZ_GLOBAL_ACTIONS_SDESK

    3. Remove the end date for the STARTCONF lookup code (the date in the Effective Dates To column) and ensure that the Enabled check box is selected.



4. Save.

3. To enable Web collaboration in Service Request and Contact Center modules,, make sure the following functions are enabled for the agent responsibility:

Function Name	Description
Access Web Conferencing Special Menu Item Internal Name: CS_HA_AXS_OWC_SM	Enables agents using the Service Request window to start the Web conference via the Tools menu.
Starting Web Conference Internal Name: CS_OWC_START_FN	Enables agents in the Contact Center to start the Web conference by choosing Start Conference from the Tools menu.

25

Generating Tasks Automatically

This chapter covers the following topics:

- Automatic Task Generation Overview
- Implementing Task Generation Setup Process Overview
- Implementing Task Generation on Status Transition
- Specifying Conditions for Task Generation
- Updating a Task Template Group Mapping
- Setting Up Rules for Handling Multiple Valid Mappings

Automatic Task Generation Overview

When an agent creates a service request, the application can automatically generate tasks that are used in the resolution of the customer problem. This makes it possible for an agent to schedule a repair on the first call rather than having the dispatcher to call the customer back, for instance.

Automatic task generation is most useful for known problems that have standard resolutions. If agents need to research the problem, by using the knowledge base and other methods, then the tasks required to resolve the problem vary.

Service request tasks are automatically generated when additional attributes are defined for the first time, when the service request is created or updated. The generated tasks appear in the Task tab of the Service Request window and must be assigned and scheduled by the agent handling the service request or through automatic assignment.

> **Note:** If your agents are using the Contact Center module, you can instead generate tasks based information agents and customers enter in additional attributes you have set up. These two methods of generating tasks are mutually exclusive. See Generating Tasks on Additional Service Request Attributes, page 41-1.

You must set up service task territories for default assignment of task owners in automatic generation of tasks from task templates. If the Assignment Manager is unable to assign the task to an owner, the application uses the values specified in the Service: Default Service Request Task Owner Type and Service: Default Service Request Task Owner profile options. The task owner is optional if the Service: Service Task Owner Optional profile option is set to Yes. For more information, refer Automatically Assigning Service Request Tasks to Individuals, page 16-26.

To automatically generate one or more tasks based on service request types, item or item categories, and problem codes, you:

1. Set up templates for task generation using the Task common application module. The templates are called Task Group Templates because they can be used to generate one or more tasks.

2. Map the task group templates to the conditions that trigger task creation.

   You can map a task group template to one or more of the following:

   - A service request type
   - A problem code
   - An item or item category

   For any service request, the application creates tasks from only one task group template.

   Mappings enable you to create an overlap. However, you must set up a set of rules for the application to determine the mapping to choose in case they do.

   For example, for customers reporting blurred images on their X-ray machines, a medical diagnostic equipment company may want to send a technician to assess the nature of the problem first, if the caller doesn't know the make or the model of the machine they own. But if a customer calls in with the details, the company may send a repair crew with the correct parts right away.

   In this case, the company creates two mappings:

   Mapping 1

   The table below shows the first mapping:

Mapping Object	Value
Service Request Type	Image Problems
Item Category	X-ray machines

   The mapped task template group creates a task to send a technician to investigate

the nature of the problem.

Mapping 2

The table below shows the second mapping:

Mapping Object	Value
Service Request Type	Image Problems
Item	Acme X-ray Model #1

The mapped task template group creates a task to send a repair crew with the correct parts.

If an agent creates a service request for a problem with the Acme X-ray machine Model #1, both mappings are valid.

To handle the overlapping case, the company sets up a rule that in case both mappings apply, the application chooses the most specific mapping.

3. You must create service request task territories to assign the default task owner (either a group or an individual) otherwise the tasks are not created.

Automatic Task Generation and Other E-Business Suite Applications

Here are a few considerations for implementing automatic task generation for other Oracle E-Business Suite applications that use service requests:

- Oracle iSupport

  Customers creating service requests in Oracle iSupport only see the tasks if you set them to the status of Publish.

- Oracle Knowledge Management

  Oracle Knowledge Management makes it possible for solutions to include task templates agents can use these to generate tasks manually. If you are using this feature, you may wish to restrict automatic task creation to service request types that do not require knowledge management searches to prevent the accidental creation of duplicate tasks.

- Oracle Enterprise Asset Management and Oracle Complex Maintenance, Repair, and Overhaul

  These two applications do not use tasks for assigning work, so you do not want to set up automatic task generation for the service request types for these applications.

About Generating Tasks on Request Types, Items, and Problem Code

This group of topics explains how to implement automatic generation of tasks based on service request types, item or item categories, and problem codes.

The general procedure for the setup is covered in Implementing Task Generation Setup Process Overview, page 25-4.

The other topics provide details for:

- Specifying Conditions for Task Generation, page 25-6
- Updating a Task Template Group Mapping, page 25-7
- Setting Up Rules for Handling Multiple Valid Mappings, page 25-8

Implementing Task Generation Setup Process Overview

This procedure outlines the steps for implementing automatic task generation based on service request types, item or item categories, and problem codes.

To set up automatic task creation:

1. Set the system profile option Service: Auto Generate Tasks to Task Template Mapping.

   The other possible values for the profile, which can be set at the site, application, or the responsibility levels, are:

   - None (the default setting)

     Disables the automatic creation of tasks based on the attributes.

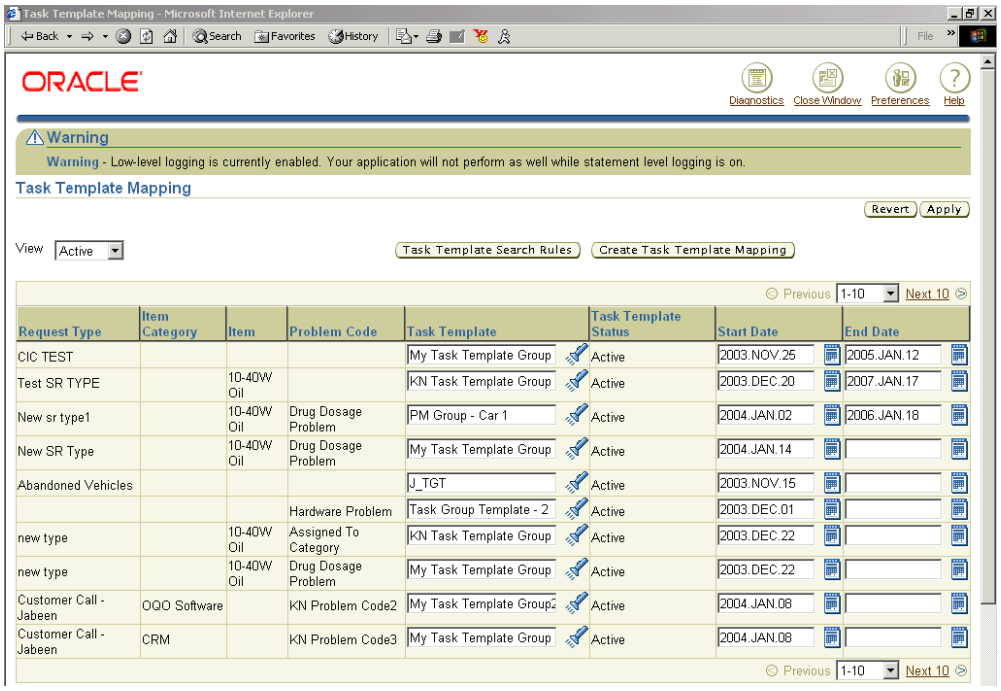
   - Task Type Attribute Configuration

     Enables automatic creation of tasks based on the information entered in the attributes.

2. Create task group templates according to the procedures described in *Oracle Common Application Calendar Implementation Guide*. Each task group template can generate multiple tasks. When creating task templates, select **Service Request** as the document type.

3. Navigate to Setup, the Mapping, and select Task Template Mapping.

   The Task Template Mapping page appears in a browser window displaying existing mappings.



4. Specify the factor or combination of factors that trigger the task or tasks to be generated. See Specifying Conditions for Task Generation, page 25-6.

5. Create a set of rules that determine, which tasks get generated should a service request match more than one mapping. See Setting Up Rules for Handling Multiple Valid Mappings, page 25-8.

6. You must create service request task territories to assign the default task owner (either a group or an individual) otherwise the tasks are not created.

Implementing Task Generation on Status Transition

This procedure outlines the steps for implementing automatic task generation based on status transition.

Prerequisites

❒ You must create status groups by following the procedure outlined in Setting Up Status Groups, page 7-12 and map them to service request types or a combination of service request type and responsibility.

To set up automatic task creation:

1. Set the system profile Service: Auto Generate Tasks on Service Request Status

Transitions to Yes.

2. Navigate to Setup, then Rules, and select Status Groups and Transitions.

   The Status Group Summary page lists status groups that have already been set up and provides the launching point for updating, copying, and creating new status groups and their transitions.

3. Select a status group and click Update.

4. In the Transitions section, for each status transition, select the appropriate task template group from the LOV. However, this may be optional for some status transitions as automatic task generation is not required for them.

Specifying Conditions for Task Generation

Use this procedure to specify the conditions that trigger tasks to be automatically generated at service request creation. This is called a task template mapping.

Prerequisites:

You must create task group templates before you can map them.

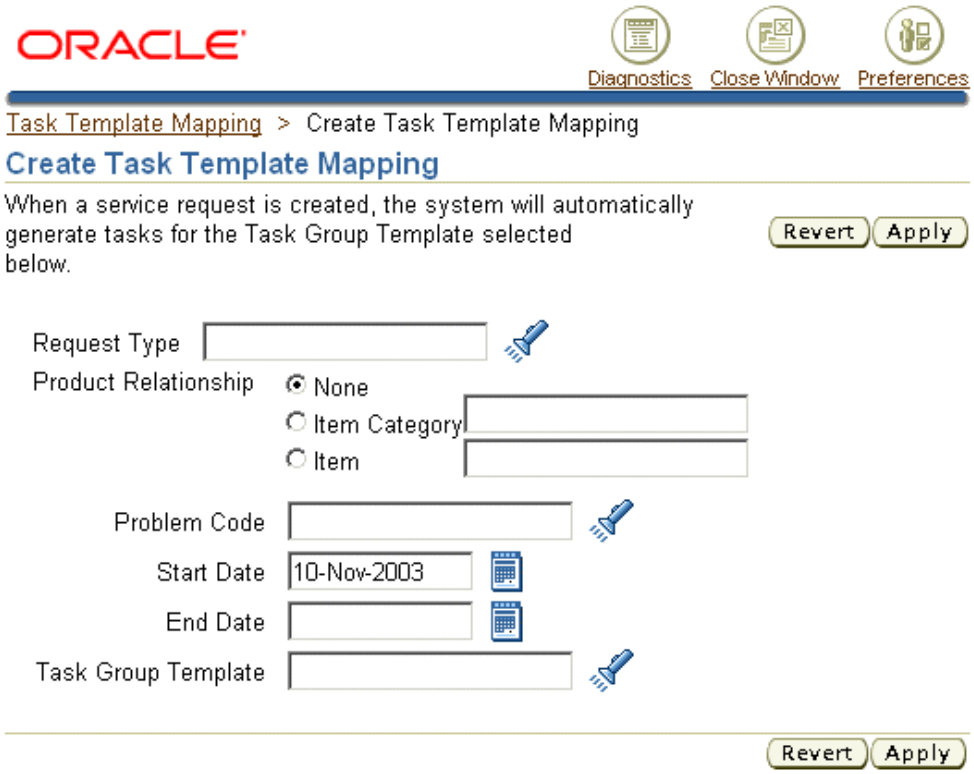
To create a task template mapping:

1. Under the Service responsibility, navigate to Setup, then Mapping, and select Task Template Mapping.

   The Task Template Mapping page appears.

2. Click **Create Task Template Mapping**.

3. The Create Task Template Mapping page appears.



4. Select the object or combination of objects you want to map:
   - For service request types, use the Request Type list of values (the flashlight icon) to make your selection.
   - To map to an inventory item or an item category, select either the Item or the Item Category option and use the list of values to make your selection.
   - For problem codes, use the Problem Code list of values.
5. To limit the availability of this mapping use the Start Date and End Date fields.
6. Select the task template group using the Task Group Template list of values.
7. Click **Apply** to save your mapping.

   The new mapping appears in the Task Template Mapping page.

Updating a Task Template Group Mapping

You cannot specify a different set of objects in a mapping after you save it. However, you can update a mapping by:

- Selecting a different task template group so that different tasks get generated.
- Removing a mapping from use by specifying an end date for it.

To update a task template group mapping:

1. Under the Service responsibility, navigate to Setup, then Mapping, and select Task Template Mapping.

   The Task Template Mapping page appears.

2. To map a different task template, use the Task Template list of values to select it.
3. To remove a particular mapping from use, enter a past date in the End Date field.
4. Click **Apply**.

Setting Up Rules for Handling Multiple Valid Mappings

Use this procedure to set up rules that determine which task group template the application uses to generate tasks when a service request satisfies the criteria for more than one mapping.

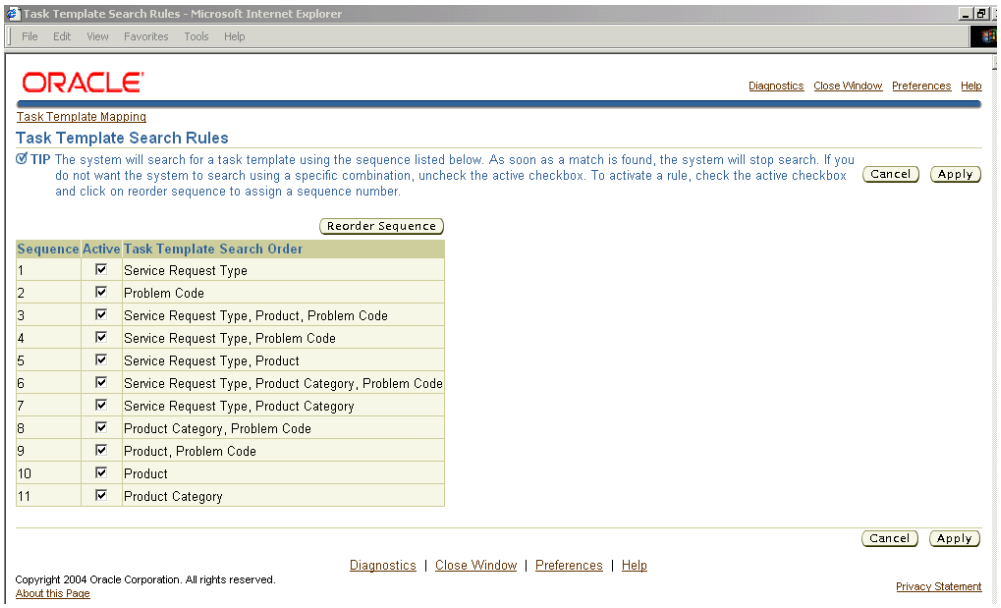
To set up rules to choose among multiple valid mappings:

1. Navigate to Setup, then Mapping, and select Task Template Mapping.

   The Task Template Mapping page appears.

2. Click **Task Template Search Rules**.

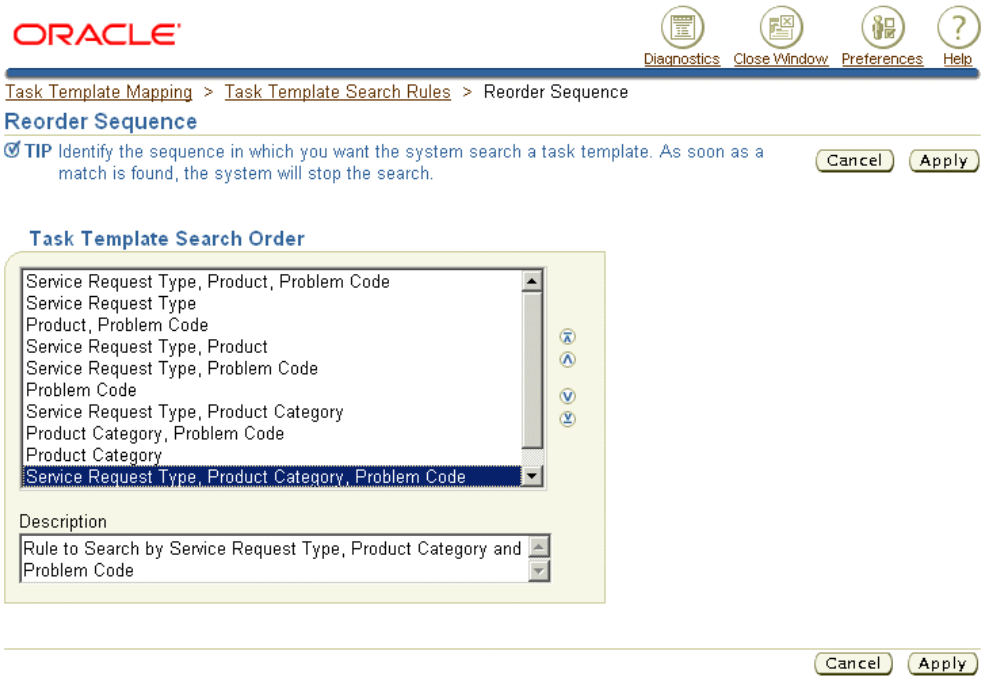
   The Task Template Search Rules page appears displaying all existing search rules.



3. Select the task template search order you wish to use using the Active check boxes.

4. Click **Reorder Sequence** to determine the sequence in which the application picks the templates.

   The Reorder Sequence page appears listing the active templates.



5. Move the templates in the list to the order you desire using the arrow controls on the right.

6. Save the sequence by clicking **Apply**.

26

Mass Updating Service Requests

This chapter covers the following topics:

- Overview
- About Mass Service Request Update
- Searching for Service Requests
- Updating Service Requests
- Confirming Update of Service Requests

Overview

Many support organizations need to transfer unresolved high priority issues between their various support centers. As one support center closes after its normal working hours, any critical issues that have shorter SLAs can be transferred to another support center, which is starting its normal working hours.

For example, ABC Corporation has two support centers - one located in Denver, USA and another in Perth, Australia. When the support center in Perth completes its working day at 5.00 pm AWST, the support center in Denver, USA starts its normal working day and vice versa. Any high priority unresolved issues must be transferred to the support staff in Denver to the Perth support center for action. Since support centers deal with multiple issues; these must be transferred from one resolving group to another with some information about the service requests.

About Mass Service Request Update

The Mass Service Update Request feature enables you to update more than one service requests in a single operation.

You can search for a group of service requests and select them for mass update.

With the Mass Service Request Update feature, you can:

- Reassign a group of service requests.
- Add a common note to a group of service requests.
- Change the status of a group of service requests.

Use the following steps to update a group of service requests simultaneously.

1. Search for the service requests.
2. Select the relevant service requests.
3. Update the service requests.
4. Confirm the update.

Searching for Service Requests

You can search for service requests to be updated based on different search criteria, including any extensible attributes you have set up to capture additional service request information. For example, you can search for all service requests created for a customer within the last week, or search for all service requests that have been escalated, or all requests that have missed a deadline.

You can also search using other nonindexed extensible attributes using the Service Request Additional Attributes. When you add an attribute using the Add Attribute list, it appears as a field below the default search criteria.

To save your search criteria for reuse, track service requests of a colleague who left on vacation, for example, or to track escalated service requests of your support group, perform a search and click Save Search As on the results page. All saved searches are displayed on the Search page.

Updating Service Requests

You can modify any or all of the following attributes for a group of service requests in a single update operation:

- Status
- Resolution Code
- Group
- Owner

You can add a note to all service requests that have been selected for mass update. You can specify the following attributes for a note:

- Note Type
- Visibility
- Note

Reassigning Service Requests

You can reassign a group of service requests to a resolving group by changing the group or the owner.

Automatic Assignment of Service Requests

Service requests can be automatically assigned to a group or owner if you select the Auto Assign Group and Auto Assign Owner check boxes respectively. The Service: Real-Time Automatic Assignment of Service Requests in Agent-Facing Applications profile option must also be set to Yes to enable automatic assignment.

Some of the rules that apply to the group and owner assignment when automatic assignment is enabled are listed below:

Automatic Assignment Rules for a Group

1. If the agent does not select a value for the Group and does not select the Auto Assign Group check box, then the Group attribute is not updated for the selected service requests.

2. If the agent does not select a value for the Group and selects the Auto Assign Group check box, the Auto Assignment process assigns a group to the selected service requests. If a value is already specified for the group, then it is overwritten.

3. . If the agent selects a value for the Group and does not select the Auto Assign Group check box, then the selected service requests are updated with the value that the agent selected.

4. . If the agent selects a value for the Group and selects the Auto Assign Group check box, then the selected service requests are updated with the value that the agent selected.

Automatic Assignment Rules for an Owner

1. If the agent does not select a value for the Owner and does not select the Auto Assign Owner check box, then the Owner attribute is not updated for the selected service requests.

2. If the agent does not select a value for the Owner and selects the Auto Assign Owner check box, the Auto Assignment process assigns an Owner to the selected service requests. If a value is already specified for the Owner, then it is overwritten

3. If the agent selects a value for the Owner and does not select the Auto Assign Owner check box, then the selected service requests are updated with the value that the agent selected.

4. If the agent selects a value for the Owner and selects the Auto Assign Owner check box, then the selected service requests are updated with the value that the agent selected.

Confirming Update of Service Requests

On update of service requests, the confirmation window displays a list of service requests that are successfully updated and service requests that are not updated with the appropriate error message.

27

Global Address Format and Validation

This chapter covers the following topics:

- Specifying Global Address Formatting and Validation
- Setting Up Additional Address Styles
- Mapping Countries to Address Styles

Specifying Global Address Formatting and Validation

Agents can enter customer addresses in the formats appropriate for the country where the customer is located. For example, if a customer has a branch in Germany, agents enter the address in a format recommended by the Bundespost. For addresses in the United Kingdom, they enter the address in the format recommended by the Royal Mail.

There are six preset address formats that are available for your use:

- Japan
- Northern Europe
- South America
- Southern Europe
- UK/Africa/Australia
- United States of America

The different address formats are implemented in the application by using descriptive flexfields. Agents enter the country using a list of values and then enter the remaining address in a flexfield window.

Prerequisites:

Understanding of descriptive flexfields.

To set up global address formatting and address validation:

1. Set up flexible addresses and address validation as described in the Flexible Address and the Address Validation sections of the Customers chapter of the *Oracle Receivables User Guide.*

2. Set up the following profile options:

   - Customer Care: Default Country for Contact Center

     This profile option defaults the country in the Country field of an address on the Contact Center. The setting of this profile option is mandatory as there is no predefined default value.

   - Customer Care: Default Address Style for Contact Center

     If there is no address style associated with the country, then the application uses the address style specified in this profile. By default this system profile is set to AS_DEFAULT (the Oracle Sales Default Address Style).

   - Service: Default Address Style

     This determines the default address style for countries that have no address style for use in the address fields of service requests. The columns in the flexfield are displayed based on the style specified in the profile option.

3. To create additional address styles, follow the instructions outlined in Setting Up Additional Address Styles, page 27-2.

4. Map the countries to address styles as described in Mapping Countries to Address Styles, page 27-5.

5. Set up the Customer Care: Default Address Style for Contact Center system profile option to the address style you wish to use in case a user fails to enter a country for an address.

Setting Up Additional Address Styles

Use this procedure to create additional address styles or to modify existing styles.

Prerequisites:

Familiarity with descriptive flexfields.

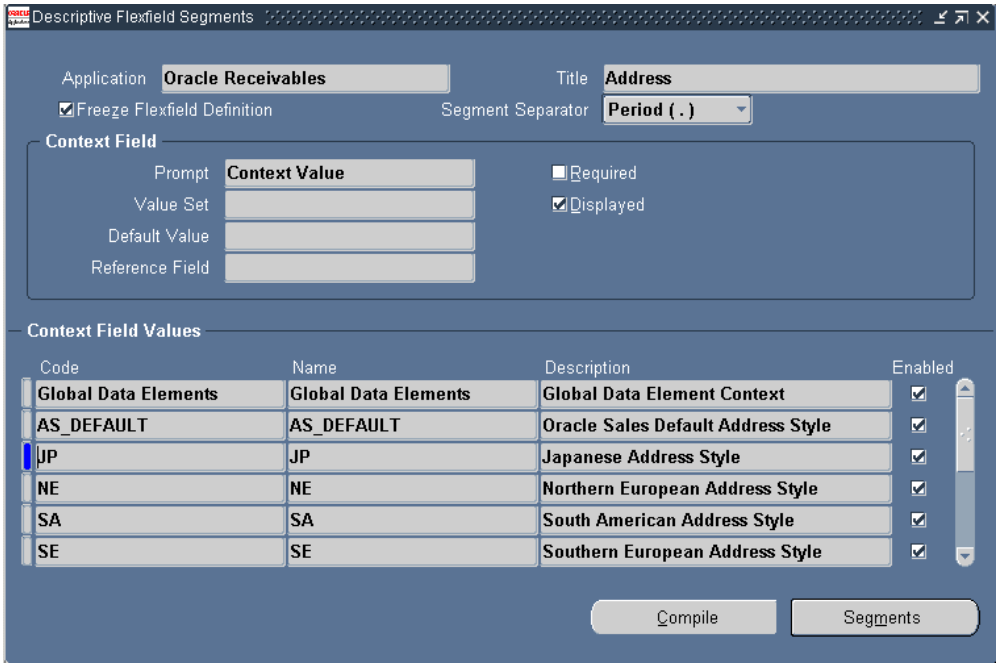
To set up additional address styles:

1. Under the Application Developer Responsibility, navigate to Flexfield, then select Descriptive, Segments.

The Descriptive Flexfield Segments window appears.

2. Search for `Address` in the Title field using the Query Enter / Query Run search method available from the View menu.

   The Descriptive Flexfield Segments window lists the available address styles.



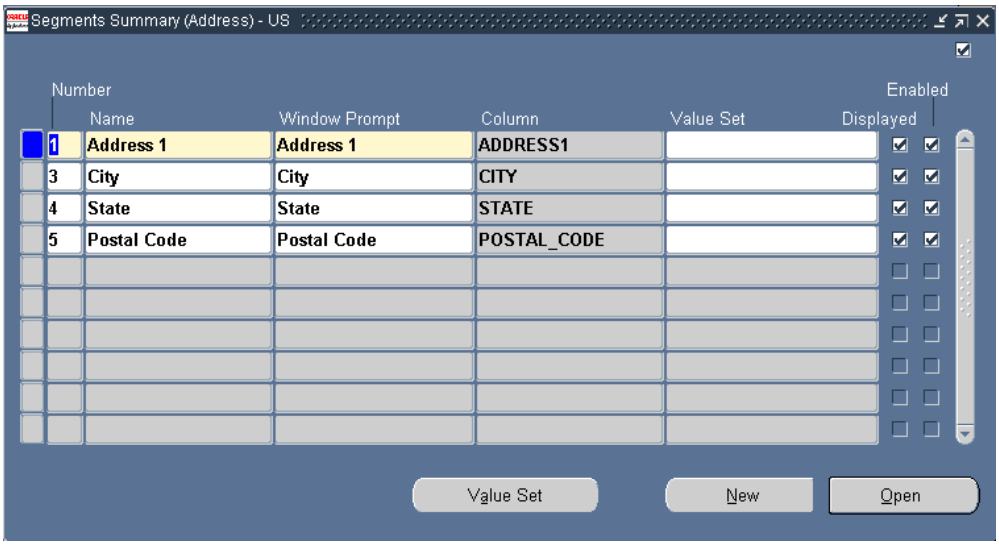
3. Create a record in the Context Field Values region but do not select the Freeze Flexfield Definition check box.

4. Enter the name of the style in the Code and Name fields.

5. Enter an optional description.

6. Click **Segments**.

   The Segments Summary window appears.



7. Enter each element of your address style:

    1. Enter a number that determines the order of the address element. The address elements appear in ascending order.

    2. Enter the element Name and Window Prompt.

    3. Select one of the available address components using the Column LOV.

    4. Select the Displayed and Enabled check boxes.

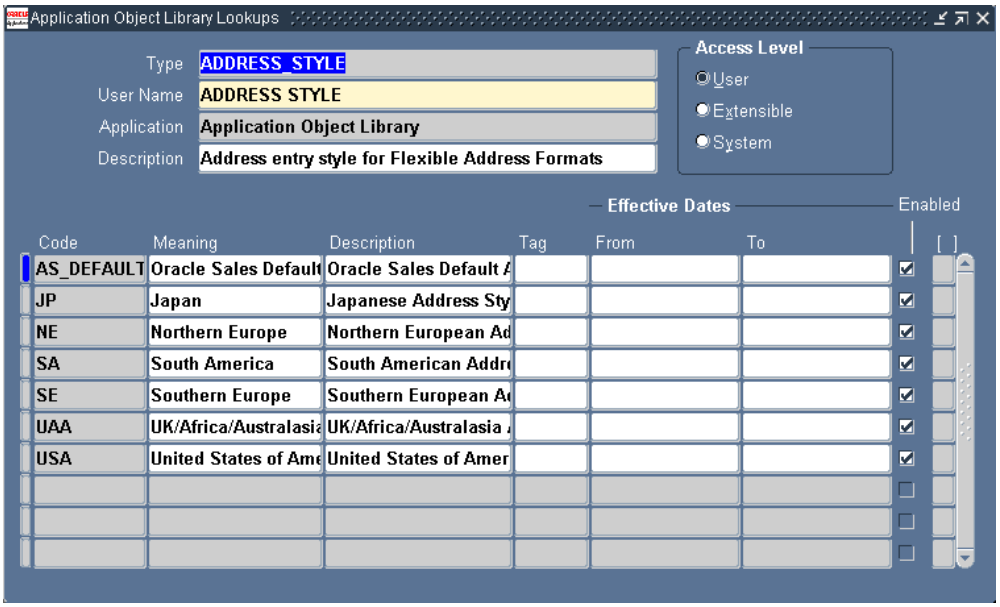
8. Click **Save**.

9. Navigate to Application, then Lookups, and select Application Object Library.

    The Application Object Library Lookups window appears.

10. Search for ADDRESS_STYLE in the Type field using the Query Enter or Query Run search method available from the View menu.

    The Application Object Library Lookups window lists the available address styles.



11. Enter the code for the address style. The value you enter in the Code field must match the code you have entered in the Context Field Values.

12. Enter the meaning.

13. Enter an optional description.

14. Select the Enabled check box.

15. Click **Save**.

Mapping Countries to Address Styles

You must make sure that each country you are doing business with is mapped to the appropriate address style. Use the following procedure to map address styles.

To map address styles:

1. Under the Receivables Manager Responsibility, navigate to Setup, then System, and select Countries.

   The Countries and Territories window appears.

2. Search for the countries that you want to set up using the Query and Enter, and Query and Run method.

3. Use the Address Style List of Values (LOV) to select the address style for each country.

4. Click **Save** on the toolbar.

28

Purging Service Requests or Cases

This chapter covers the following topics:

- Service Request Purge Overview
- Running the Service Request Data Purge Concurrent Program

Service Request Purge Overview

You can permanently delete service requests or cases and related information from your database by running the Service Request Data Purge concurrent program.

> **Note:** Case Management uses the same concurrent program to purge cases. Please read "case" for every use of "service request" both in this text and the user interface.

The purge program permits you to delete a single service request or a set of service requests that you specify using one or more of the following criteria:

- Service request number
- Status
- Type
- Creation date or date range
- Date or date range of last update
- No updates for a specified period of time, for example, six months or one year.
- Customer
- Customer account

- Item category
- Item
- All service requests except a number of the most recent you specify. For example, specifying 10,000 keeps the 10,000 most recent service requests and purges the rest.

The purge program imposes restrictions on purging. You cannot purge the following:

- Service requests other than closed service requests. These are service requests in a status that is set up as Final. (For details, see Service Request Statuses, page 7-2.)
- Open dispatch field service tasks.
- Service requests that you do not have the permission to update under your current responsibility. Purge enforces both standard service security, which you set up by mapping request types to responsibilities, and custom application security you create. For details, see Setting Up Service Request Security, page 10-1.
- Oracle Complex Maintenance Repair and Overhaul service request types.
- Service request with an Oracle Depot Repair order.
- Service requests with unsubmitted charge lines.
- Oracle Enterprise Asset Maintenance service requests.
- E-mails that are processed by the Oracle E-Mail Center. You must run the Oracle E-mail purge program to accomplish this. See the *Oracle Email Center Implementation Guide* for details.

What Information is Deleted

The purge program permanently deletes and purges from the database:

- All information captured in the service request itself, including that captured in any additional attributes you have defined. This includes all of the types of additional attributes, including, but not limited to, user-defined extensible attributes and descriptive flexfields.
- All service request tasks
- All service request notes
- Charge lines
- Links from other service requests to the purged service request

- All links from knowledge base solutions to the purged service request
- All information regarding the request in the Universal Work Queue
- Attachments
- Interaction history
- Service request audits
- Service request messages
- Contact points

Purge Records

The purge program records the following information in the concurrent request log:

- The number of service requests processed
- The number of service requests purged successfully
- The number of service requests where purge failed
- The service request number of each service request that failed and the reason why the purge failed.

This information is available by clicking the Output button on the Concurrent Requests window.

You can view the parameters used for the purge by clicking the View Details button on the same window.

In addition, you can have the concurrent program generate a detailed log of the purged service requests or cases in an audit table (CS_INCIDENTS_PURGE_AUDIT_B). The table includes:

- The ID of the concurrent request that purged the service request
- Service request type
- Customer
- Inventory Organization
- Item
- Item Category

- Item Instance
- Item Instance ID
- Creation date
- Date of last update
- User who initiated the purge
- Date of purge

You cannot view the audit table content in an user interface. You must write a SQL query to view the audit information.

Impacts on Oracle Daily Business Intelligence

If you are using Oracle Daily Business Intelligence (DBI) for service application reporting, then you must rerun that application's Initial Load concurrent program after purging. This is because your reports do not automatically correct for any purged service requests.

DBI reports impacted include:

- Customer Support (TeleService)
- Depot Repair
- Field Service
- Maintenance (eAM)
- Any other related product such as Customer Intelligence

See the *Oracle Daily Business Intelligence Implementation Guide* for details on running the concurrent program.

Running the Service Request Data Purge Concurrent Program

To run the Service Request Data Purge concurrent program, submit a single request. Under the Service responsibility, navigate to Others, and select Submit Requests.

The following table describes the program's parameters:

Parameter	Description
Number	Service request or case number. Make an entry here for purging a single service request or case.
Status	Service request status. The list of values includes only statuses for closed service requests or cases. These are statuses with the Final check box selected.
Type	Service request type. If standard service security is turned on, the list of values displays only those service request types mapped to your responsibility.
Created From	Use for deleting service requests or cases created from and including this date.
To	Use to specify end date of the creation period.
Last Updated From	Use for deleting service requests or cases updated on and from this date.
To	Use to specify the end date of the update period above.
Not Updated Since	Use the list of values to choose a period ranging from 3 months to 5 years.
Customer Number	Use for deleting service requests or cases for a single customer.
Customer Account	Use for deleting service requests or cases for a single account.
Item Category	Use for deleting service requests for a inventory item category. Item categories are not used by Case Management.
Item Number	Use for deleting service requests for a single inventory item. Items are not used by Case Management.
Retain Customer Requests	Use this field to delete all service requests or cases except the most recent number you enter here. For example, entering 10,000 here, deletes all except the 10,000 most recent service requests or cases.
Number of Workers	Enter the number of concurrent processes you want to launch at the same time.
Purge Batch Size	Enter the number of service requests or cases to be purged in a single purge process. For example, if you are purging one million service requests and you specify a batch size of 10,000 here, then the application splits the purge into 1000 separate purge processes.

Parameter	Description
Non Field Service Tasks	Used for service requests with non-field service (customer-related) tasks. You can choose to purge service requests regardless of the status of their non-field service tasks (Purge All) or purge only those service requests where these tasks are closed (Purge Closed).
Maintain Audit	Permits you to decide whether or not you want the application to populate the audit table.

For instructions on running concurrent requests see the *Oracle E-Business Suite Setup Guide*.

Part 4

Contact Center and Service Request Modules Setups

This part includes chapters describing setups for the Forms based Contact Center and Service Request modules of Oracle TeleService.

29

Service Request Form Setups

This chapter covers the following topics:

- Setting Up Message Action Codes for Oracle Workflow Messaging
- Enabling Oracle Complex Maintenance, Repair, and Overhaul

Setting Up Message Action Codes for Oracle Workflow Messaging

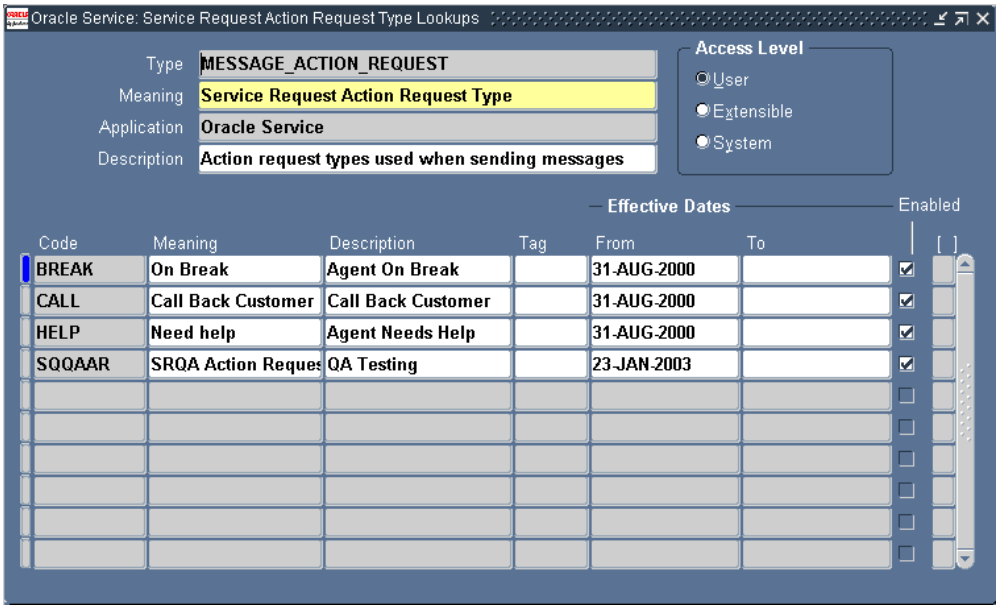
If your organization is using Oracle Workflow Messaging feature of service requests, you can use action codes to specify an action you want a message recipient to take.

Agents can send messages regarding a service request from the Service Request window by selecting Select Messages from the Tools menu.

To setup a message action code:

1. Under the Service responsibility, navigate to Setup, then Definitions, and select Action Request Types.

   The Oracle Service: Service Request Action Request Type Lookups window appears. The lookup type for the actions is "MESSAGE_ACTION_REQUEST".



2. Enter a message action code in the Code field.
3. Enter a brief description of the code in the Meaning field.
4. Enter a full description of the code in the Description field.
5. Enter the effective dates in the From and To fields.
6. Select the Enabled check box to make the code available for use.
7. Save the message action request code.

Enabling Oracle Complex Maintenance, Repair, and Overhaul

To make it possible for agents to access Oracle Complex Maintenance, Repair, and Overhaul maintenance requirements, you must implement Oracle Complex Maintenance, Repair, and Overhaul according to that application's documentation and create Service Request Types with the Complex Maintenance check box selected. See Setting Up Service Request Types, page 7-14. This is the only implementation step within Oracle TeleService.

30

Setting Up Custom Tabs on the Service Request Window

This chapter covers the following topics:

- About Setting Up Custom Tabs on the Service Request Window
- Basic Information About the Two Tabs
- Guidelines for Setting Up Custom Tabs
- Parameters Passed from the Service Request Header
- Function Names for Custom Tabs

About Setting Up Custom Tabs on the Service Request Window

You can create two custom tabs in the Service Request window by modifying the code for the Service Request form and the associated library.

You must customize the view or a table that has a reference to or intersection with CS_INCIDENTS_ALL_B. The application passes INCIDENT_ID to the control block of the form. You can use this to retrieve or save to and from the custom tabs.

Basic Information About the Two Tabs

The following table provides basic information about the tabs for the application developer:

Property	Custom1 Tab	Custom2 Tab
Form Name	CSXSRCT1.fmb	CSXSRCT2.fmb
Library Name	CSSRCT1.pld	CSSRCT2.pld

Property	Custom1 Tab	Custom2 Tab
Tab Page Name	CSXCUST1	CSXCUST2
Canvas Name	CSXSRCT1	CSXSRCT2
Data Block Name	CSXCUST1_BLK	CSXCUST2_BLK
Control Block Name	CSXCUST1_CTRL_BLK	CSXCUST2_CTRL_BLK
Window Name	FOLDER_INCIDENT_TRACKING	FOLDER_INCIDENT_TRACKING

Guidelines for Setting Up Custom Tabs

These steps provide guidelines to help you with custom tab implementation.

Prerequisites:

Knowledge of Oracle Forms development procedures and an understanding of Oracle TeleService code.

To set up the two custom tabs:

1. Customize the form using the following guidelines:
   - In the form `CSXSRCT1.fmb` and/or `CSXSRCT2.fmb`, create a data block with all the fields you wish to display in the custom tab.
   - Code an On Insert trigger for the data block to insert data into the tables.
   - Code an On Update trigger for the data block to update data in the tables.
   - Code an On Delete trigger for the data block to delete data from the tables.
   - The fields in the data block must be placed on the tabbed canvas `CC_MAIN_CSXCUST1.CSXSRCT1` and/or `CSXCUST2.CSXSRCT2`
   - Any record groups and LOVs must be coded.
   - To integrate this with the Service Request window, you must add the data block, record groups, and LOVs for `CSXSRCT1.fmb` to the `CSXSRCT1_OBJ_GRP` object group. Those for `CSXSRCT2.fmb` must be added to the `CSXSRCT2_OBJ_GRP` object group.

2. Modify the library. You can use any of the event handlers listed below:

Procedure Name	Description
WHEN-NEW-FORM-INSTANCE	This procedure calls WHEN-NEW-FORM-INSTANCE of the custom form. Code is added to this library based on the requirements of the custom form. This trigger is called from the WHEN-NEW-FORM-INSTANCE of the main form.
KEY-CLRFRM	This procedure calls CLEAR_CTRL_FIELDS, a procedure that clears the control field values populated by values from the header region. This is called from the KEY_CLRFRM of the main form
POPULATE_CTRL_FIELDS	This procedure populates the control fields from the main form. This is called by the WHEN-NEW-FORM-INSTANCE, RESTART, and WHEN-TAB-PAGE-CHANGED triggers.
SHOW_TAB_VIEW	This procedure can be used to show the stacked canvases used in the custom tab, if any. This is called in the WHEN-TAB-PAGE-CHANGED trigger of the main form.
HIDE_TAB_VIEW	This procedure can be used to hide the stacked canvases used in the custom tab, if any. This is called in the WHEN-TAB-PAGE-CHANGED trigger of the main form.
WHEN_TAB_PAGE_CHANGED	This procedure populates the control block fields and can be coded to customize any other functions. This is called in the WHEN-TAB-PAGE-CHANGED trigger of the main form.
ALLOW_ACCESS	This can be coded to enable the custom tabs. This is called in the WHEN-NEW-FORM-INSTANCE trigger of the main form.

Procedure Name	Description
DENY_ACCESS	This can be coded to disable the custom tabs. This is called in the WHEN-NEW-FORM-INSTANCE trigger of the main form.
CLEAR_CTRL_FIELDS	This procedure clears the control fields. This is called from the Key_Clrfrm Procedure of the custom library.
RESTART	This procedure can be used to populate the control fields. This is called from the RESTART trigger of the main form.

All the code to handle API calls can be put in the library CSSRCT1.pld and/or CSSRCT2.pld.

3. Integrate the forms with the Service Request form:
   1. Copy the forms CSXSRCT1.fmb and/or CSXSRCT2.fmb to the $AU_TOP/forms/US directory in the patched environment.
   2. Compile the corresponding library and copy CSSRCT1.pll and/or CSSRCT2.pll to the $AU_TOP/resource directory in the patched environment.
   3. Run the adadmin utility to compile CS forms and libraries so that the changes made to the custom form and library are reflected in the Service Request form.

Parameters Passed from the Service Request Header

The parameters listed in the following table are passed from the Service Request form to the CSXSRCT1 and CSXSRCT2 forms:

Parameter	Description
CSXCUST1_CTRL_BLK. INCIDENT_ID	Identification number for the Service Request
CSXCUST1_CTRL_BLK.INCIDENT_TYPE_ID	Identification number for the Service Request type

Parameter	Description
CSXCUST1_CTRL_BLK.INCIDENT_STATUS_ID	Identification number for the Service Request Status
CSXCUST1_CTRL_BLK.INCIDENT_SEVERITY_ID	Identification for the Service Request Severity
CSXCUST1_CTRL_BLK.INCIDENT_OWNER_ID	Identification number for the Service Request Owner
CSXCUST1_CTRL_BLK.OWNER_GROUP_ID	Identification number for the Service Request Owner Group
CSXCUST1_CTRL_BLK.INCIDENT_NUMBER	Service Request Number
CSXCUST1_CTRL_BLK. INCIDENT_DATE	Service Request Date

These parameters are populated by the POPULATE_CTRL_FIELDS procedure, which is called by the WHEN-NEW-FORM-INSTANCE trigger, the WHEN-TAB-PAGE-CHANGED trigger, and the RESTART trigger.

Function Names for Custom Tabs

The function name for CSXSRCT1 is CS_HA_AXS_CUSTOM1_TAB. For CSXSRCT2 it is CS_HA_AXS_CUSTOM2_TAB. You can add these functions to the CS_HA_SERVICE_REQ_FUNCTIONS to show the custom tabs.

By default, the tabs are hidden, so you must enable the function in the menu CS_HA_SERVICE_REQ_FUNCTIONS.

Either of the custom tabs can also be set as default tabs.

> **Note:** Please back up your custom forms and libraries before applying any future CS patches for these files so they are not overwritten in $AU_TOP/forms/US and $AU_TOP/. After the patch is applied successfully, you must copy the customized files back to these directories and run adadmin to generate CS forms and libraries.

31

Enabling Multiple Time Zone Support

This chapter covers the following topics:

- Multiple Time Zone Overview
- Enabling Multiple Time Zone Support

Multiple Time Zone Overview

By default, all dates and times in the Service Request and Contact Center windows are displayed in a single time zone: the server time zone.

The only exception is the Current Time field in the header of Service Request window. It displays the current time in the service request contact time zone.

When you enable multiple time zones using the procedure described in this chapter, agents can:

- View the dates and times in their own (client) time zone.

  Agents can indicate their own individual preference by setting a system profile at the user level.

- View the resolution and response times in the time zones of the incident address and the primary contact on the service request.

This makes it easier for agents to talk about response and resolution times in the context of the time zone that is meaningful to customers.

In addition, the time zone view an agent selects is passed to the Assignment Manager for assigning tasks (available only in the Table View mode).

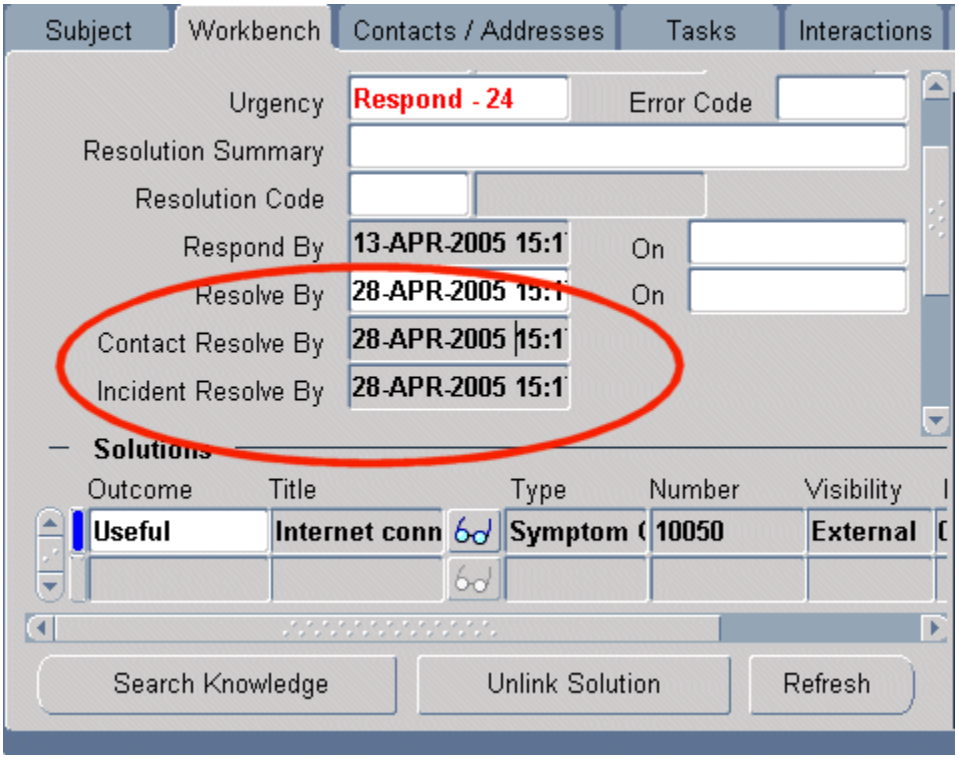
The enabling of multiple time zones does not affect the way contractual coverage times are derived, only the way they are displayed. Oracle Service Contracts already takes multiple time zones into account when applying coverage. For example, if a contact based in New York is reporting an incident in China. The application applies the coverage specified in the contract for the Chinese time zone

Service Requests

To display additional time zone information on service requests, you must use the Folder tools on the Workbench tab of the Service Request window and the Service Request tab of the Contact Center. The additional fields you can display are:

- Contact Respond By
- Contact Responded On
- Contact Resolve By
- Contact Resolved On
- Incident Respond By
- Incident Responded On
- Incident Resolve By
- Incident Resolved On

The "Contact" fields show times in the contact time zone; the "Incident" fields, in the incident time zone. The image below shows two fields added to the Workbench tab of the Service Request window:



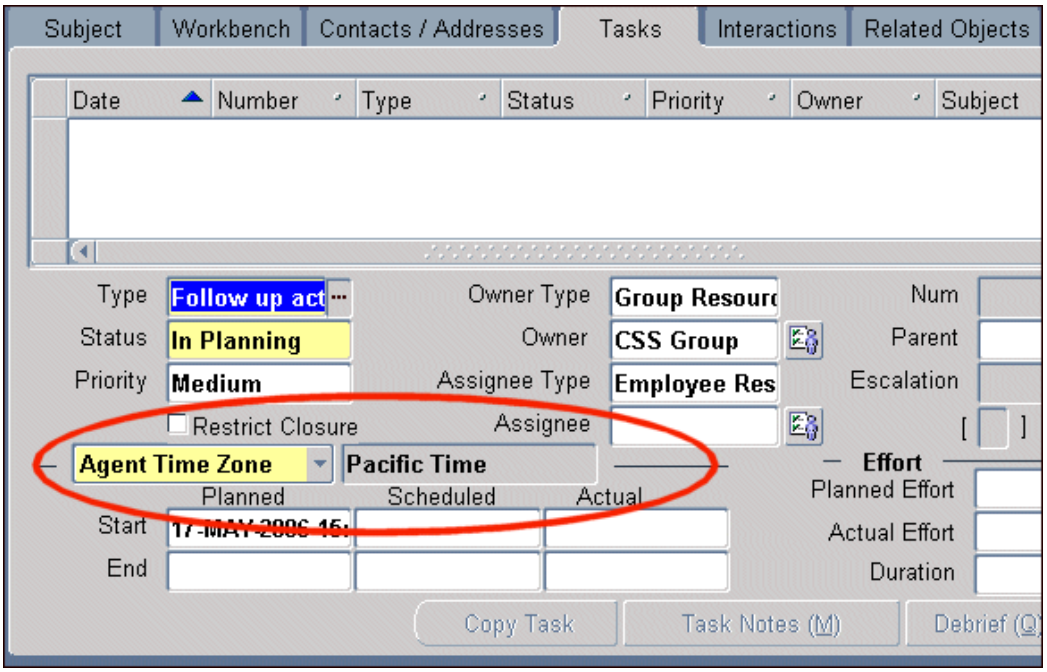
The same fields can be added to the Service Request tab of the Contact Center.

Service Request Tasks

For tasks, agents can toggle between the different time zone displays by using a list and avoid adding extra fields.

For tasks, the choices are: agent, contact, incident, customer, or corporate time zones.

The image below highlights the list in the Tasks tab of the Service Request window.



The same list is available in the Quick Task window agents use to create service request tasks in the Contact Center.

Enabling Multiple Time Zone Support

Use this procedure to enable multiple time zone support for the Service Request and Contact Center and Quick Task windows.

To enable multiple time zones:

1. Under the Service responsibility, navigate to Others, then Profile System Values and set the following system profiles:

    - Enable Timezone Conversion

      Setting this system profile to Yes enables multiple time zone support for your application.

- Server Timezone

  This specifies the server time zone and can be set only at the Site level.

- Client Timezone

  This specifies the agent time zone and can be set at all levels. Because this system profile can be set at the user level, you can instruct agents to set it themselves for the time zone they prefer.

- Service: Default Timezone Source

  This system profile specifies the default time zone the application uses to display task dates. The available values are Agent, Customer, Contact, Incident, and Corporate (Server). This system profile can also be set by agents themselves at the user level to specify their personal preference.

2. Using the Folder tool in the Forms based modules, you can , display the time zone dependent fields you want on the Service Request tab of the Contact Center window and the Workbench tab of the Service Request window.

32

Setting Up Charges for Items Tracked by Install Base

This chapter covers the following topics:

- About Charges and Oracle Install Base
- Overview of Charges Setups for Oracle Install Base Items
- Charges and Install Base Updates
- Key Fields
- Valid Cases
- Setting Up Oracle Install Base Transaction Subtypes for an Activity

About Charges and Oracle Install Base

This group of topics describes how to setup the Charges module of Oracle TeleService to handle orders and returns for items tracked by Oracle Install Base, for example, units returned as part of Return Material Authorizations (RMAs) and other customer support logistics.

Agents enter these types of charge lines either in the Charges tab of the Service Request window, in Oracle Field Service, or Oracle Depot Repair. This chapter focuses mainly on setups for the Charges tab. You must see the Oracle Field Service and Oracle Depot Repair implementation guides for additional details on setups specific to their products.

If you do not use Charges to send or receive items tracked by Oracle Install Base, then you do not have to perform any of the setups in this chapter.

Overview of Charges Setups for Oracle Install Base Items

If you are shipping or receiving items tracked by Oracle Install Base, then you must set up the service activities you are using in the order or return lines as Oracle Install Base transaction subtypes. If the orders are shipped and received through Charges, then

follow the instructions using the procedures in this chapter. If a different application such as Oracle Depot Repair ships or receives the item, then you must set up the subtype according to that application's documentation instead.

If you are using a specific activity to ship or receive only items that are not tracked by the install base, then you do not need to set up the Oracle Install Base transaction subtypes

The following topics explain the key fields required for this setup and provide a comprehensive listing of valid permutations for setting up order and return lines.

For steps you must follow, seeSetting Up Oracle Install Base Transaction Subtypes for an Activity, page 32-13.

Charges and Install Base Updates

When you ship or receive products to and from the customer, the Oracle E-Business Suite must record the changes in the customer's install base: indicating which unit was shipped by entering its serial number, for example, or changing the ownership of the part or its installation address.

Because multiple applications can make the required updates, you must choose whether you want Charges to:

- Update the install base and bill the customer
- Bill only

Update Install Base and Bill the Customer

If the charge lines are used by agents to enter charges in the Charges tab of the Service Request window or logistics lines entered in Oracle Depot Repair's Debrief window, then you must set up the line to both update the install base and bill for any associated charges.

An RMA charge line or a logistics line may or may not actually generate an invoice for the customer. You do not charge a customer for a product they want exchanged if that product is under warranty, for example. If a customer choose a more expensive replacement, then you may want to charge for the difference.

Bill Only

Set up charges to bill only when the install base update is being done through a different application or the update has already been done.

When charge lines are set up for Oracle Field Service or Oracle Depot Repair nonlogistics lines, applications that update Oracle Install Base directly, must set up Charges as bill only.

For example, when field service technicians install new parts at the customer site, they

enter the serial numbers of the parts they used in the Debrief window of Oracle Field Service and that application automatically updates the install base. In this case, agents use the Charges tab to only view and modify the amounts customers are charged, and to submit these amounts to Accounts Receivable via Oracle Order Management.

You may set up a bill only line for Oracle TeleService to permit agents to enter additional charges on orders that have already shipped (and therefore already updated the install base. For example, an agent who has underbilled a customer for a replacement part can add a new charge line to correct the error.

Key Fields

This section describes the key fields and check boxes for setting up different types of charge lines. These are:

- Line Category field
- Non-Source Info region (for orders)
- Source Info region (for orders and returns)
- Change Owner fields
- Update IB check box

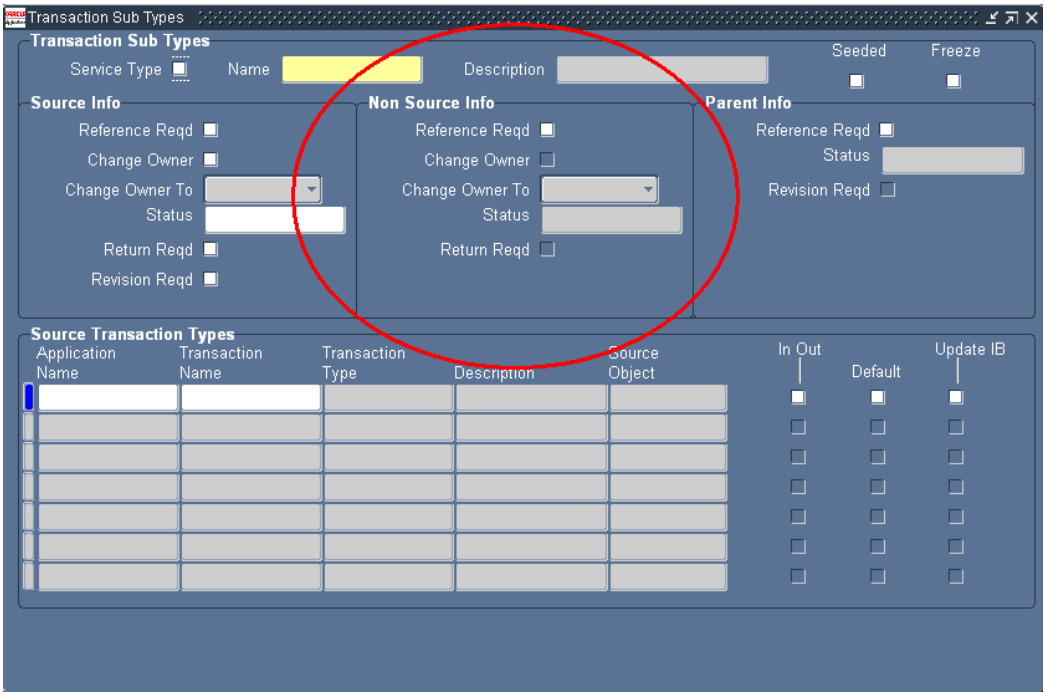
Line Category

Each business process is associated with a list of activities that can be performed as part of that process. For Charges, you must classify each activity as either line category of order or return. See Setting Up Service Activities for details.

The rest of the key fields are in the Transaction Subtypes window.

Non-Source Info Region

The Non-Source Info region of the Transaction Subtypes window is window is used with order (shipment) charge lines. Here you enter information about the item being replaced in a return for replacement scenario, for example. The Reference Reqd. check box determines if agents are required to enter an item instance identifier for the charge line. These can include serial numbers, tag numbers, or item instance numbers.



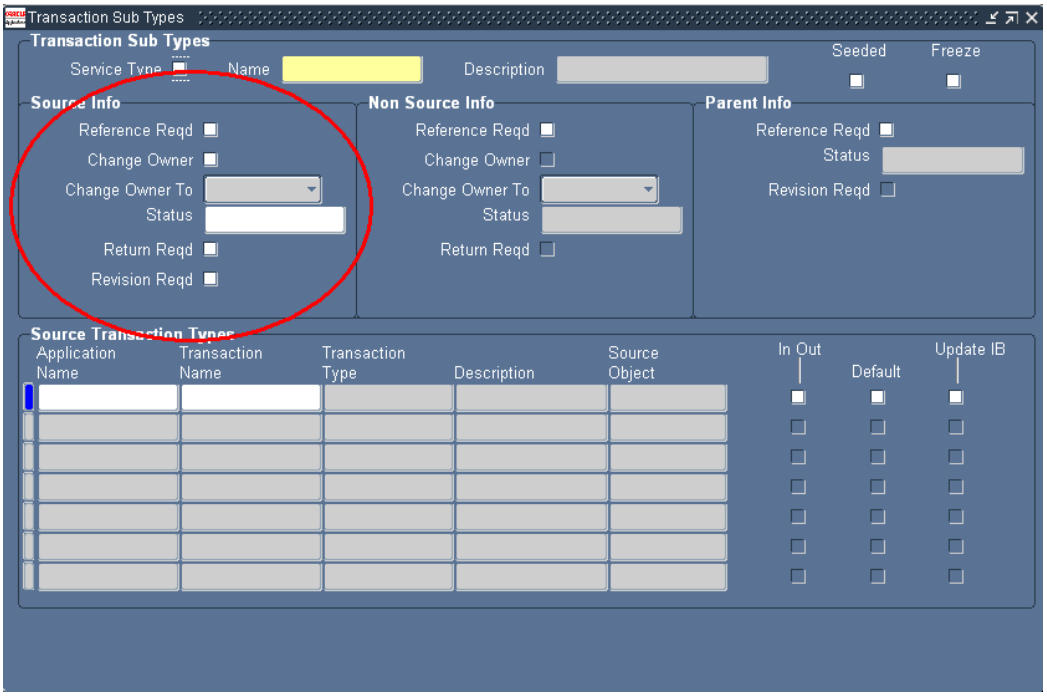
You can make entry of an item instance reference mandatory when agents are using the Charges tab or the Debrief window to record which item instance is being replaced. You may want to leave the instance reference optional if the given service activity can be used for a variety of order transactions, not all of which are replacements.

Making entry mandatory has slightly different effect on agents using the two interfaces: agents using the Charges tab cannot save the charge line until they enter the item instance reference; agents using the Debrief window can save the line but receive an error message requiring them to make a correction if they attempt to finalize the debrief in that state.

Oracle Order Management has its own rules about what information is required for entry and is not affected by entries you make in Charges.

Source Info Region

For returns, you must specify information about the item received from the customer in the Source Info region of the Transaction Subtypes window. The Reference Reqd check box determines if agents must enter the item instance reference when creating a charge line for a return.



You may want to leave entry as optional for returns for a number of reasons:

- You may be shipping a replacement part for a customer with a number of units, and don't know which damaged unit is going to be shipped back.
- A customer may not know the serial number because it is hidden inside the unit or illegible.

For orders, you use the Source Info region to specify what updates are to be performed for item instances that get shipped via Order Management or Shipping. For example, in loaner shipment transactions, the Source Info region typically specifies that no ownership change is to take place. For transactions used to ship parts to customers, however, the Source Info region specifies that ownership needs to be updated to the receiving customer.

Note that for orders, the Source Info region refers not to the instance that can be identified on the charge line, but to the instance that is shipped by Order Management or Shipping.

Change Owner

You must select the Change Owner check box and choose either Internal or External using the Change Owner To list to indicate that the part is changing ownership in the transaction.

This check box appears in both the Source Info region (used for orders or returns) and Non-Source Info region (used for orders).

For example, if you are entering a line for the customer to return a damaged unit, then you select the Change Owner check box in the Source Info Region and choose Internal because you want the install base record for the part changed to indicate that the unit owner is now the internal organization.

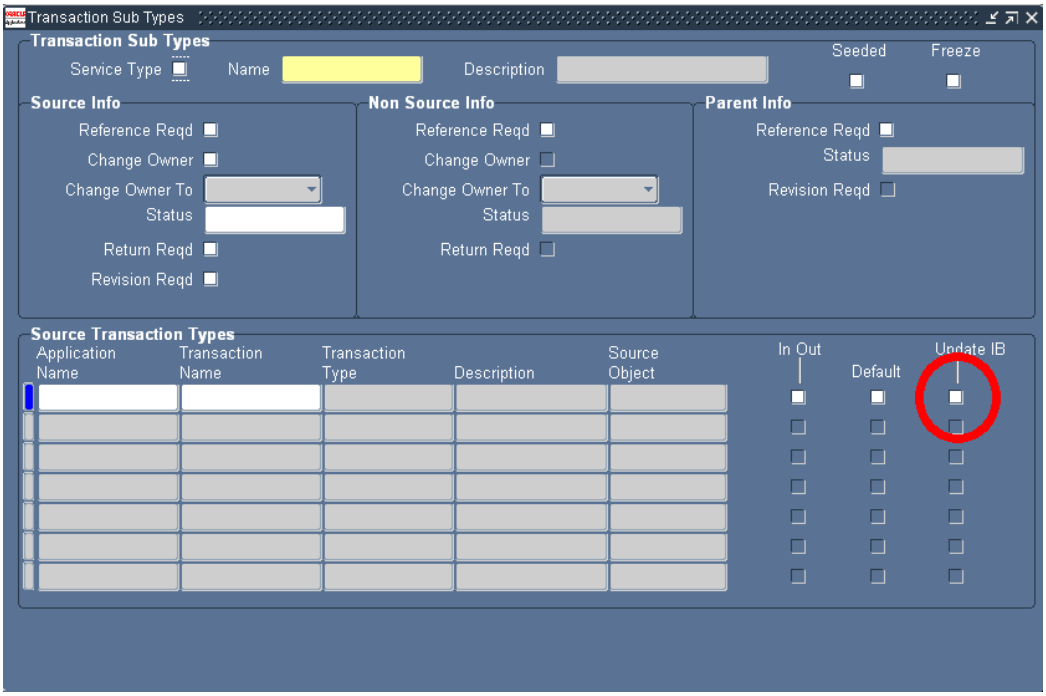
If you are creating an order line for a loaner, then you must deselect this check box because the loaner does not change ownership. The application still updates the location address to the customer's shipping address, but the ownership remains the same.

Source Transaction Types Region

The Source Transaction Types Region is where you specify the applications that may be affected by the setup.

Each application that uses the subtype is entered in a line. For most applications the Application Name is the name of the application (for example, Field Service for Oracle Field Service.) However, for Charges you must enter "Order Management."

The Update IB check box to the right of each line determines if that application is permitted to update Oracle Install Base. For Oracle TeleService, you must choose the Update IB check box for only one of the applications involved.



To have Charges make the updates, select the Update IB check box next to the Order Management line.

To have Charges bill only, leave this check box deselected. You must select it for a different application, such as Oracle Field Service, for example.

Valid Cases

The following sections contain tables listing the valid setups for service activities of type return and order.

Here is an explanation of the table columns:

- Case Number

  Case numbers are used by this guide to explain the combination of lines you need to set up different kinds of returns (RMAs).

- Case Type

  Update the install base and bill or bill only.

- Description

- Non Source Reference Reqd Check Box

  The Reference Reqd check box in the Non-Source Info region of the Transaction Subtypes window. This is relevant only for Orders.

- Source Reference Reqd Check Box

  The Reference Reqd check box in the Source Info region of the Transaction Subtypes window applies for Orders and Returns.

- Change Owner Check Box or list

  Specifies if you must select the check box and make a selection from the list either in the Non-Source Info (orders) or the Source Info (returns) regions.

- Source Transaction Types Region

  Describes entries that specify which application updates the install base.

Return Lines

The following table lists the possible valid settings for Charge lines recording items you receive from the customer (activities of Line Category of Return). For all items you receive, except when you receive loaners, you select the Change Owner check box and select Internal from the list to change ownership from the customer to your own company.

Case No.	Case Type	Description	Source Reference Reqd Check Box	Change Owner	Source Transaction Types Region
R1	Update IB and bill	Return item tracked by install base and require instance entry. Charges makes the IB change.	Selected	Selected and Internal	Enter Order Management and select its Update IB check box.
R2	Update IB and bill	Return item tracked by install base and make instance entry optional. Charges makes the IB change.	Deselected	Selected and Internal	Enter Order Management and select its Update IB check box.
R3	Bill only	Return item tracked by install base and make instance entry optional in Charges. Entry is required in another application such as Field Service or Depot and that application makes the IB change.	Selected	Selected and Internal	Enter Order Management. Do not select its Update IB check box. Enter the application that is doing the updating and select its Update IB check box instead.
R4	Bill only	Return item tracked by install base and make instance entry optional in Charges. Entry is also optional in the application that makes the IB change.	Deselected	Selected and Internal	Enter Order Management. Do not select its Update IB check box. Enter the application that is doing the updating and select its Update IB check box instead.
R5	Update IB and bill	Return loaner tracked by install base and require instance entry. Charges makes the IB change.	Selected	Deselected	Enter Order Management and select its Update IB check box.

Case No.	Case Type	Description	Source Reference Reqd Check Box	Change Owner	Source Transaction Types Region
R6	Update IB and bill	Return loaner tracked by install base and make instance entry optional. Charges makes the IB change.	Deselected	Deselected	Enter Order Management and select its Update IB check box.

Order Lines

The following table lists the possible cases for orders (items you ship to the customer).

Case No.	Case Type	Description	Source Trans.Types Region	Source Ref. Reqd. Check Box	Source Change Owner Check Box	Non Source Ref. Reqd. Check Box	Non Source Change Owner Check Box
O1	Update IB and bill	Ship a replacement item tracked by install base and change ownership of the shipped item to the customer at shipment time. Entry of the replaced item reference is required. Charges makes the IB changes.	Enter Order Management and select its Update IB check box.	Deselected	Selected and External	Selected This requires agents to enter a reference to the item instance being replaced. If the replaced item is covered by a contract, the coverage is moved to the replacement.	Deselected Ownership of the item being replaced is not changing at shipment time. It is changed when the item is received.

Case No.	Case Type	Description	Source Trans.Types Region	Source Ref. Reqd. Check Box	Source Change Owner Check Box	Non Source Ref. Reqd. Check Box	Non Source Change Owner Check Box
O2	Update IB and bill	Ship an item tracked by install base and change ownership of the shipped item to the customer at shipment time. This line can be used for regular shipments as well as replacements. Charges makes the IB changes.	Enter Order Management and select its Update IB check box.	Deselected	Selected and External	Deselected Makes it optional for agents to enter a reference to the item instance being replaced. If the reference is entered, then the contract coverage is moved as in O1.	Deselected Ownership of the item being replaced is not changing at shipment time. It is changed when the item is received.
O3	Bill only	Bill for a replacement install base item shipped or installed via another application. Entry of replaced item reference is required.	Enter Order Management. Do not select its Update IB check box. Enter the application that is doing the updating and select its Update IB check box instead.	Deselected	Selected and External The ownership change is made through the other application.	Selected Requires agents to enter a reference to the item instance being replaced in both Charges and the other application and moves the contract coverage to the new item.	Deselected

Case No.	Case Type	Description	Source Trans.Types Region	Source Ref. Reqd. Check Box	Source Change Owner Check Box	Non Source Ref. Reqd. Check Box	Non Source Change Owner Check Box
O4	Bill only	Bill for an install base item shipped or installed via another application. This line can be used to bill for regular shipments as well as replacements.	Enter Order Management. Do not select its Update IB check box. Enter the application that is doing the updating and select its Update IB check box instead.	Deselected	Selected and External The ownership change is made through the other application.	Deselected Makes entry of reference to the item instance being replaced optional both in Charges and in the other application. If entered, the other application moves the contract coverage to the new item.	Deselected
O5	Update IB and bill	Ship a loaner tracked by install base. Ownership of loaner item instance remains with the internal organization. Replaced item instance entry is not relevant.	Enter Order Management and select its Update IB check box.	Deselected	Deselected	Deselected	Deselected

Setting Up Returns (RMAs)

Oracle TeleService's Charges supports four types of returns:

- Return for credit
- Return for replacement

- Return with a Loaner
- Return for repair

This section describes how you can set up each type of return.

Return for Credit

To set up a return for credit, you must set up:

- Pricing and service contracts to determine the right refund amount.
- A service activity of line category Return.
- If the return involves an item tracked by Oracle Install Base, then set up an Install Base Transaction Subtype either case R1 or R2.

  Use R1 if the customer or agent can always identify the install base item being returned.

  Use R2 if the customer may not always know the unique identifier. For example, the instance serial number is invisible from the outside or unreadable. If the customer cannot supply it, then the receiving clerk can enter it at the time of receipt. Note that Oracle Order Management does not enforce any required entry to be set up.

Return for Replacement

For a return for replacement you must set up:

- Pricing and service contracts to determine the right net amount to charge the customer if there is an upgrade or a penalty such as a restocking fee.
- Two service activities: one for the return and one for the order.
- Two Install Base Transaction Subtypes: one for the return and one for the order.

  For the return, use R1 if the customer can always identify the item instance and if you want to ensure the transfer of a contract from the item returned to the item you are shipping as a replacement.

  Use R2 if the customer may not know the unique identifier.

  For the item to be shipped to the customer, use O1 if the replaced instance must be tracked, for example, to move contractual coverage from the replaced item to the replacement. Use O2 if tracking by Oracle Install Base is optional for the replacement part being shipped.

Return with a Loaner

For a return with a loaner, you must set up:

- Usually no pricing and service contracts setup is required because there is no charge for a loaner.
- Two service activities: one for the return and one for the order
- Two Install Base Transaction Subtypes: one for the loaner shipment (order) and one for the loaner return.

For the order line, use O5.

For the return line, use R6 if the customer can always identify the item instance. Use R5 if the customer may not know the unique identifier.

Return for Repair

For a return for repair you must set up:

- Usually no pricing and service contracts setup is required if the same item is being returned to the customer.
- Two service activities: one for the return and one for the order
- Two Install Base Transaction Subtypes: one for the return and one for the order.
- Additional service activities may be required, for example, bill only service activities for parts used during repair, as well as loaner shipment and return.

  The return line is the same as that for Return for Credit: Use R1 if the customer can always identify the item instance. Use R2 if the customer may not know the unique identifier.

  For the order line, use O2. Usually you ship out the same item the customer returned so there is no need to require a reference. In the rare case that the item is not repaired and a different item is being shipped, then the agent can supply the reference to the replaced item.

  For bill only service activities, use O3 or O4.

  For loaner service activities, use R5, R6, and O5.

Setting Up Debrief Lines for Replaced Parts

To set up a charge line for use by agents to record which parts have been replaced during debrief, set up O3 or O4 depending on whether you require a technician to enter the replaced part's Oracle Install Base reference or not. This applies to Oracle Field Service debrief as well as Oracle Depot Repair both task and WIP mode.

Setting Up Oracle Install Base Transaction Subtypes for an Activity

If agents are to ship or receive items tracked by Oracle Install Base, then you must set

up the service activities associated with those items as Oracle Install Base Transaction Subtypes.

Inventory items are associated with service activities indirectly through their billing types. You can determine the activities that need to be set up by looking at the billing type of an item and viewing all of the service activities associated with that billing type.

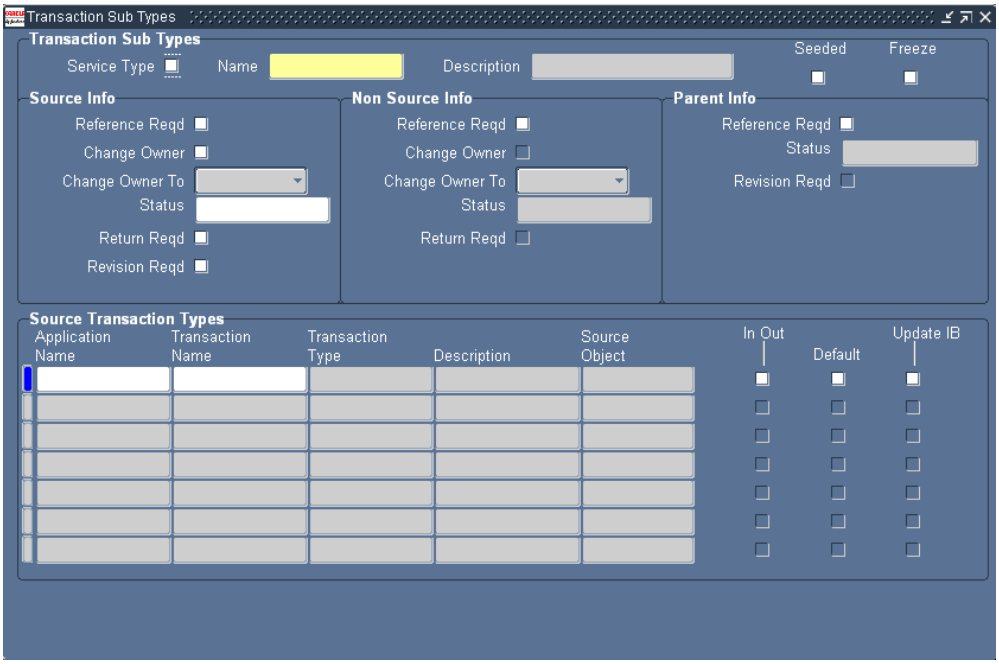
Prerequisites:

- You must implement Oracle Install Base including Transaction Types.
- You must create service activities first.
- You must know whether the activities are of type return or order. Return activities are used by agents to record items to be shipped back by customers. Order activities are used to ship items out.

To set up Oracle Install Base transaction subtypes:

1. Under the Service responsibility, navigate to Setup, then Charges, and select Install Base Transaction Types.

   The Transaction Sub Types window appears.



2. Select the Service Type check box.
3. Select the service activity you would like to set up from the Name list of values.

Note: Different types of activities require different setups in the Source and Non-Source Info regions.

4. If the activity you are setting up is of type return, used by agents to record return of parts from customers, then set up the Source Info region:

    1. Select the Reference Rqd check box.

    2. To change ownership of the part, select the Change Owner check box and select Internal from the Change Owner To list. This indicates the part is now owned by your organization. For loaners, deselect this check box.

    3. To update the status of the item in the customer's install base, select a new status using the Status LOV.

    4. To require agents to enter a date in the Return By date field in Charges, select the Return Reqd check box. The return by date is the date the return must be received.

5. If the service activity is of type order, used by agents to ship replacement parts to customers, then make entries in the Non Source Info region. You can either require agents to enter the instance of the part being replaced or you can choose to make the entry optional.

    Making the entry optional is useful for enabling agent to ship replacement parts to a customer if the instance of the part being replaced is not yet known. For example, you may wish to ship a replacement computer board to a customer with ten computers without knowing which instance is being replaced.

    - To make instance entry optional, deselect the check box and optionally display information in the other fields. In this case agents are permitted, but not required to enter instance information for the customer item being replaced.

    - To require agents to enter the instance information for the item being returned by the customer:

        1. Select the Reference Rqd check box in the Non Source Info region. This check box requires agents to enter an instance or serial number for the item being replaced.

        2. To record the change of ownership of the part, select the Change Owner check box and select "External" from the Change Owner To list. This indicates the part is now owned by the customer.

        3. To update the status of the item in the customer's install base, select a new status using the Status LOV.

Note: The Parent info region is reserved for future use.

6. In the Source Transaction Types region:

    1. Use the Application Name LOV to enter Oracle Order Management. This permits Oracle TeleService and Oracle Depot Repair users to use this subtype.

    2. Select a valid source transaction type from the Transaction Name LOV. Source transactions types are used by Oracle Install Base and are set up according to procedures described in the *Oracle Install Base Implementation Guide*.

    3. Select the Update IB check box to update the install base when an item is shipped or received.

       If you leave this check box deselected, Charges bills only. In this case you must enter a different application such as Oracle Field Service as a line in this region and select the Update IB check box to indicate that the update is made in the install base instead.

    4. Select the Default check box to have this subtype be the default for Oracle Order Management.

       Note: The Source Object field and the In Out check boxes are reserved for future use.

7. Enter any other applications that you wish to permit to use this subtype.

   Note: You cannot have more than one application update the install base at the same time. This means that you should create separate service activities and subtypes for Oracle Field Service and Charges. If you do want to use the same subtype for both, however, then you can permit only one application to make the update by selecting the Update IB check box for only one application.

33

Automating Submission of Oracle Field Service Charges

This chapter covers the following topics:

- About the Topics on the Automatic Submission of Charges
- Overview of Automatic Charges Submission
- Modifying the Automatic Submission Process
- About Setting Up Rules to Restrict Automatic Submission
- Adding a Restriction Rule
- Updating a Restriction Rule
- Setting Up Automatic Submission

About the Topics on the Automatic Submission of Charges

This group of topics explains how to set up the application to automatically submit Oracle Field Service debrief charges to Oracle Order Management and bill customers. It covers:

- Overview of Automatic Charges Submission, page 33-1
- Ways You Can Modify the Automatic Submission Process, page 33-3
- About Setting Up Rules to Restrict Automatic Submission, page 33-4
- Setting Up Automatic Submission, page 33-9

Overview of Automatic Charges Submission

You can set up the application to automatically submit any Oracle Field Service charges to Oracle Order Management that agents have entered in the Oracle Field Service

Debrief window.

There are two types of charge lines that can be created as a result of the Oracle Field Service debrief:

- In Progress: Debrief lines belonging to task assignment that are in one of five statuses: Completed, Closed, Cancelled, Rejected, or On Hold.
- Actual: Debrief lines belonging to task assignments not in any of the above five statuses.

The automatic submission process submits only charge lines of type Actual and only those resulting from Oracle Field Service Debrief.

These lines are created when an engineer creates a debrief line in the Debrief window and changes its Assignment Status to one of the five statuses: Completed, Closed, Cancelled, Rejected, or On Hold.

You must run the Charges Autosubmission Concurrent Program to automatically submit charges to Oracle Order Management.

The process does not submit:

- Estimates and pending charges (lines of type Estimate or In Progress)
- Charges entered in Oracle Depot Repair debrief
- Charges agents entered directly in the Charges tab of the Service Request Window
- Charge lines with errors

  The submission process can fail if Oracle Order Management requires additional information not supplied by Charges, such as the entry of a sales person associated with the order, for example.

  Agents can view any error messages provided by Oracle Order Management by clicking the Charge Line Status Details button in the Charges tab.

Agents can see if the line has been submitted by checking the Status field in the Charges tab of the Service Request window. The following table lists and describes the possible statuses:

Charge Line Status	Description
New	All charge lines start with this status including estimates and those in progress.

Charge Line Status	Description
Submitted	The charge line has been successfully submitted either by the automatic submission concurrent program or by an agent clicking the Submit button or from Oracle Depot Repair.
For Review	The charge line has violated one of the restrictions rules set up during implementation. For example, you can set up a rule that bars the automatic submission of charges that are more than ten percent from the original estimate price. Agents can review lines of this type and submit them manually.
Failed	Automatic submission has failed because Oracle Order Management requires additional information. Agents must view the error message, supply the missing information, and submit the line manually.

Modifying the Automatic Submission Process

There are several ways you can modify the automatic submission process. You can:

- Restrict charges from being automatically submitted and billed to customers.

  You can set up one or more rules that bars charges from being submitted automatically. For example, you can prevent the application from automatically submitting charges to specific customers, or prevent any charges from being submitted if they exceed the estimated price by more than ten percent. See About Setting Up Rules to Restrict Automatic Submission, page 33-4.

- Have Oracle Order Management bill the customer automatically or let agents book the order in Oracle Order Management.

  Set the system profile option Service: Charges Book Order Automatically to Yes to create orders with a status of Booked. Orders are in the Entered status if you retain the default setting of No.

- Specify at what stage you want to automatically submit charges

  By setting the system profile Service: Charges Auto Submit Mode, you can have charges submitted individually any time charges are created, wait until all of the tasks are closed, or until the service request has been set to a final status.

- Determine the frequency with which charges are submitted by specifying the frequency of the concurrent program runs.

About Setting Up Rules to Restrict Automatic Submission

You can set up rules that restrict which charges are submitted automatically.

For a description of the available rules, see About Restriction Rules, page 33-4.

For setup information, see:

- Adding a Restriction Rule, page 33-6
- Updating a Restriction Rule, page 33-7

About Restriction Rules

This topic describes the different rules you can use to restrict the automatic submission of charges.

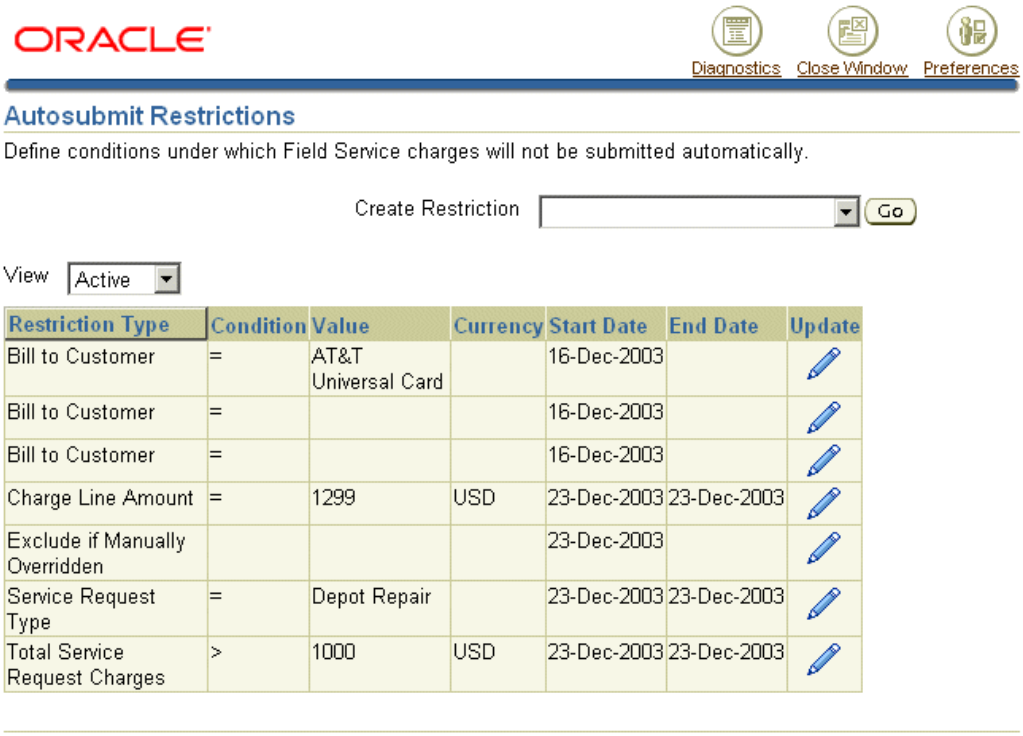
By default, the application includes one rule: the application does not submit charge lines if an agent has modified their pricing. (You can turn this rule off by entering an end date.)

The following table lists and describes the available restriction rules:

Rule	Description
Actuals Exceed Estimates	Limits automatic submission if the total service request charges fall within a percentage above the total estimated charges. You can specify only one rule of this type. The rule calculates the percentage based on the following formula: (Total Actuals + Total In Progress - Total Estimates)/Total Estimates * 100 If the service request contains charges in multiple currencies, each currency is evaluated separately.

Rule	Description
Bill to Customer	Does not submit the charge line if the customer you specify is to be billed for the service. This restriction is based on the Bill To party. You can create multiple rules of this type to exclude specific customers from automatic billing.
Charge Line Amount	Each charge line must be below (or above depending on the operator you select) the amount you specify. The rule considers only the charge lines for the currency you specify as it does not perform any currency conversions. You can create multiple rules of this type, one for each currency.
Exclude Manually Overridden Charges	By default, the application does not submit charge lines modified by agents. You have the option of turning this rule off by entering an end date.
Service Request Type	Prevents charges belonging to service requests of a particular type from being automatically submitted. You can create multiple rules of this type.
Total Service Request Charges	Total charges for the service request must be below (or above depending on the operator you select) the currency amount you specify. You can create only one rule of this type per currency.

You can view and update restriction rules on the Autosubmit Restrictions page available by navigating under the Service responsibility to Setup, Charges, Autosubmit Restrictions.



To add a rule, select the rule type from the Create Restriction list and click **Go**. For details see Adding a Restriction Rule, page 33-6.

To update a rule, click **Update** to the right of the rule. For details, see Updating a Restriction Rule, page 33-7.

Adding a Restriction Rule

Use this procedure to add a restriction rule.

For a description of the available rules, see About Restriction Rules, page 33-4.

To add a restriction rule:

1. Under the Service responsibility to Setup, and select Charges, Autosubmit Restrictions.

2. Select the rule type from the Create Restriction list and click **Go.**

   The application displays a different entry page depending on the rule you wish to add. The table below explains the different entries you can make depending on the rule you have selected:

Rule	What you enter:
Actuals Exceed Estimates	Enter a percentage (without the percent sign) in the Value(%) field.
Bill to Customer	Enter the customer in the Value field using the list of values.
Charge Line Amount	1. Enter the operator using the Condition drop-down list 2. Enter the amount. 3. Select the Currency using the list of values.
Exclude Manually Overridden Charges	You can turn this rule off by entering an end date.
Service Request Type	Enter the Service Request Type in the Value field using the list of values.
Total Service Request Charges	1. Enter the operator using the Condition list 2. Enter the amount. 3. Select the Currency using the list of values.

3. Click **Apply**.

   The new rule appears in the Autosubmit Restrictions page.

Updating a Restriction Rule

Use this procedure to update an automatic submission restriction rule.

For a description of the available rules, see About Restriction Rules, page 33-4.

To update a restriction rule:

1. Under the Service responsibility navigate to Setup, then Charges, and select Autosubmit Restrictions.

2. Click **Update**.

   The application displays a different entry page depending on the rule you want to update. The table below explains the different entries you can make depending on the rule you have selected:

Rule	What you can update:
Actuals Exceed Estimates	• Enter a new percentage (without the percent sign) in the Value(%) field • Disable the rule by entering an end date.
Bill to Customer	• Enter a different customer • Disable the rule by entering an end date.
Charge Line Amount	• Enter a different operator using the Condition list • Modify the amount. • Select a different Currency using the list of values.
Exclude Manually Overridden Charges	Turn this rule on and off by entering or removing dates.
Service Request Type	• Enter a different Service Request Type in the Value field using the list of values. • Specify an end date for the rule.

Rule	What you can update:
Total Service Request Charges	• Enter a different operator using the Condition list • Modify the amount. • Select a different Currency using the list of values. • Specify an end date for the rule.

3. Click **Apply**.

   You are returned to the Autosubmit Restrictions page.

Setting Up Automatic Submission

Use this procedure to set up the automatic submission of Oracle Field Service charges to Oracle Order Management, as entered by agents in debrief.

To set up the automatic submission of charges:

1. Set up any restrictions for submitting charges. See Setting Up Rules to Restrict Automatic Submission, page 33-4.

2. Under the Service responsibility, navigate to Others, then Profile System Values and set the system profile Service: Charges Autosubmit Mode.

   This system profile determines at what stage the charges are submitted. You can set this profile to:

   - **When All Tasks Final**

     This mode submits charges when all tasks that are in the Closed status. If the automatic submission process fails for any charge line associated with the service request, none of the lines are submitted.

   - **When Service Request Final**

     Submits charges when the service request is set to a status designated as Final. If the automatic submission process fails for any charge line associated with the service request, none of the lines are submitted.

   - **As Available**

Charges are submitted after the Oracle Field Service concurrent program creates them from debrief. If any line encounters errors, all subsequent charge lines for that service request are not submitted.

3. Run the Charges Autosubmission Concurrent Program with the frequency you desire. To run the program, navigate to Others, and select Submit Requests.

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Modifying Contact Center Behavior

This chapter covers the following topics:

- Modifying the Behavior of Contact Center Tabs Overview
- Modifying the Behavior of the Dashboard Tab
- Modifying the Behavior of the Interactions Tab
- Modifying the Behavior of the Notes Tab and All Notes Window
- Modifying the Behavior of the Tasks Tab
- Modifying the Behavior of the Service Request Tab
- Implementing the Contracts Tab
- Modifying the Behavior of the Install Base Tab
- Setting Up the Invoices Tab
- Modifying the Behavior of the Orders Tab
- Enabling the Collateral Tab
- Modifying the Behavior of the Addresses Tab
- Modifying the Behavior of the Contact Points Tab
- Restricting Access to the Accounts Tab and Account Details Window
- Modifying the Behavior of the Party Information Tab
- Modifying the Behavior of the Relationships Tab
- Modifying the Behavior of the Contact Center Header
- Enabling Attachments in the Contact Center
- Configuring the Contact Center Header

Modifying the Behavior of Contact Center Tabs Overview

You can modify the behavior of the Contact Center tabs by:

- Setting default values in the key fields to speed up agent entry
- Restricting access to tab functions or the entire tab itself
- Modifying the lookups which determine what agents see in the lists of values

The topics in this section cover the modifications you can make in each of the seeded Contact Center tabs:

- Dashboard, page 34-2
- Interactions, page 34-4
- Notes, page 34-5
- Tasks, page 34-6
- Service Request, page 34-8
- Contracts, page 34-11
- Install Base, page 34-11
- Invoices, page 34-12
- Orders, page 34-13
- Collateral, page 34-15
- Addresses, page 34-16
- Contact Points, page 34-17
- Accounts, page 34-18
- Party Information, page 34-18
- Relationships, page 34-20

Modifying the Behavior of the Dashboard Tab

The Dashboard tab displays summaries of key information about customers, accounts, and contacts. Agents can drill down to the individual documents summarized on the

tab. To gather the information displayed in this tab and drill down, you must set up customer profiles. For more information, About Customer Profiles, page 22-3.

In addition, you can modify the behavior of the tab. You can:

- Limit drill downs

  By default, agents are permitted to open multiple windows when they drill down to detailed customer information. You can restrict them by setting the system profile Customer Care: Open Multiple Sessions for Dashboard Drilldown to No.

- Permit automatic refresh of customer information

  You can refresh customer information on the dashboard each time an agent displays a customer. For details see Setting Automatic Refresh of Profiles on the Dashboard, page 22-31.

- Specify if the tab must display customer, contact, or account information by default.

  Using the View By list, agents can specify whether they want to display information for a customer, account, contact, customer address, or contact address.

  When you select a customer or a contact from the View Details For list in the Contact Center header, the dashboard is refreshed to display information for the selected customer or contact. You can later use the View By list to change the view on the dashboard.

  You can also set the default value for the View By list by setting the value in the Customer Care: Default Dashboard Display by Customer, Account or Address profile option. However, if the profile is set to Site or Account, and the values for the customer address or the account are not displayed in the Contact Center header, then the View By list displays information by customer. The values displayed in the View By list are associated with the CSC_DB_VIEW_BY_SELECTION lookup.

  When the type of contact is Employee, then the contact address value in the list is not displayed, as profile checks cannot be defined at the employee site level.

- Restrict access to the tab and Refresh button by responsibility

  You can specify which responsibilities can access the tab and button by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps all of these functions.

Description	Function
Access to the Dashboard tab	CSCSFDSB
Access to the Dashboard tab Refresh button	CSCSFRBU

You can bar responsibilities from viewing a tab or another UI interface such as a button by excluding the function from the responsibility or for all responsibilities by removing that function from the menu.

- Restrict access to the View Critical check box and View By list by responsibility

  You can specify which responsibilities can be used to enable the View Critical check box and the View By list by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide*. The Service responsibility maps all of these functions.

Description	Function
View the Critical Customer indicator on the Dashboard tab	CSCSFDBC
Access the View By Account check box on the Dashboard tab	CSCSFDBA

Modifying the Behavior of the Interactions Tab

Agents use the Interactions tab to view the history of interactions with a customer. You can:

- Specify the number of records the tab displays

  This is accomplished by entering the number in the system profile Customer Care: Number of Interactions Displayed in Contact Center. By default this system profile is set to 12.

- Restrict access to the tab or individual buttons by responsibility

  You can specify which responsibilities can access the tab and buttons by mapping the functions listed in the following table according to the procedures described in *Oracle Applications Setup Guide.* The seeded Service responsibility maps all of these functions.

Description	Function
Access to the Interactions tab	CSCSFINT
Access the Account Interactions button	CSCFAAB

Description	Function
Access to the All Interactions button	CSCSFAIB

Modifying the Behavior of the Notes Tab and All Notes Window

You must set up notes as described in the *Oracle Common Application Calendar Implementation Guide.*

Agents can view notes either in the Notes tab or in the View All Party Notes Web browser page. The tab permits agents to view only one note at a time and to create new notes. The Web page displays all notes for the customer with no creation permitted.

For the Notes tab, you can:

- Specify the default note type for new notes.

  This is accomplished by setting the system profile Customer Care: Default a Type for New Notes in the Notes Tab. By default, there is no default.

- Specify the default note status for new notes.

  Set the system profile Note: Default Note Status. By default, this profile is not set to any value. The default you enter affects not only new notes created in the Contact Center, but all notes in all applications.

  If you are capturing extended attributes for service requests created in the Contact Center, the application saves the information as notes. You choose to display these notes for customers on their Oracle iSupport Web portal by setting the system profile Service: Default Note Status for Extended Attributes to Publish. This system profile overrides Note: Default Note Status for these types of notes. For details see Capturing Additional Service Request Information with Extensible Attributes, page 45-1.

- Restrict access to the tab and the ability to create new notes by responsibility.

  You can specify which responsibilities can access the tab and create new notes by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps all of these functions.

Description	Function
Access to the Notes tab	CSCSFWKB

Description	Function
Create Notes on the Notes tab	CSCSFCNO

For the View All Party Notes page, you can:

- Include note details text in the list.

  Note details store additional text in a separate table from regular notes text and can only be entered in a separate Details window. Displaying this text is accomplished by setting the system profile Customer Care: Display Note Details in All Party Notes Page by Default to Yes. By default, this profile is set to No.

- Specify the number of records you want to display at one time.

  This is accomplished by setting the system profile Customer Care: Display Note Details in All Party Notes Page by Default to Yes. By defaul,t this profile is set to 10.

- Specify the maximum age of displayed notes.

  You can specify in days how far back you want to display notes by making an entry in the Customer Care: Default Date Range for View All Party Notes Page. By default, this system profile is set to 30.

Modifying the Behavior of the Tasks Tab

You must set up tasks as described in the *Oracle Common Application Calendar Implementation Guide.*

You can specify different default values for agents creating new tasks on the tasks tab. You can set:

- The default task Type for new tasks

  Set the system profile Task Manager: Default Task Type. The selection you make affects all tasks, not just those created in the Contact Center. The default value is Breakfast.

- The default task Priority

  Set the system profile Task Manager: Default Task Priority. The selection you make affects all tasks, not just those created in the Contact Center. The default value is Medium.

- The default task Status

  Set the system profile Task Manager: Default Task Status. The default setting is Open.

- The default Assignee Type, either a group, team, or individual employee

  Set the system profile Customer Care: Default Assignee Type for New Customer Tasks. Tasks can be assigned either to an individual employee (Employee Resource), a group (Group Resource), or a team (Team Resource). By default this profile is set to Employee Resource. An assignee is an individual or group responsible for carrying out the work.

- The Assignee responsible for completing the task

  Set Customer Care: Default Assignee for New Customer Tasks to an assignee of type you have specified in Customer Care: Default Assignee Type for New Customer Tasks.

- The default type of owner assigned to customer-related tasks created on the Tasks tab

  Set the system profile Customer Care: Default Owner Type on the Contact Center Tasks Tab to the type of owner responsible for coordinating the completion of the task.

  Task ownership can be assigned either to an individual employee (Employee Resource), a group (Group Resource), or a team (Team Resource). The default setting is Group Resource. All three owner types are set up in the Resource Manager foundation module.

  The Owner Type does not display in the tab but determines which resources appear in the list of potential task owners. This system profile does not affect service request tasks created on the Service Request tab.

- The default task Owner for customer-related tasks

  Set the system profile Customer Care: Default Task Owner for New Customer Tasks to the resource of the type you have specified in the Customer Care: Default Owner Type for Contact Center Tasks. A task owner is the person or group responsible for coordinating the completion of the task.

- Restrict access to the tab and individual tab functions by responsibility

  You can specify which responsibilities can access the tab and individual tab functions by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps all these functions.

Description	Function
Access to the Tasks tab	CSCSFTSK

Description	Function
Create a task on the Tasks tab	CSCSFCTK
Update a task on the Tasks tab	CSCSFUTK
Access the Assignment Manager button next to the Owner and Assignee fields of the Tasks tab	CSCSFAMB
Access the Details button on the Tasks tab	CSCSFATB
Access to the Add Notes button on the Tasks tab	CSCSFANB
Access to the Use Template button on the Tasks tab	CSCSFUTB
Access to the Launch Workflow button on the Tasks tab	CSCSFLWF
Access to the More button on the Tasks tab	CSCSFMBU

Modifying the Behavior of the Service Request Tab

You can modify the behavior of the Contact Center Service Request tab by:

- Specifying different default values for agents creating new service requests

  Set the system profiles described in the following table. Because agents can create service requests on this tab and in the Service Request window, all settings you make here apply to both.

System Profile	Description	Default Setting
Service: Default Service Request Type	Specifies the default value for service request Type	Customer Service Request
Service: Default Service Request Urgency	Specifies the default value for service request Urgency	High

System Profile	Description	Default Setting
Service: Default Service Request Severity	Specifies the default value for service request Severity	None
Service: Default Service Request Owner	Specifies the default value for service request Owner	None
Service: Default Service Request Status	Specifies the default value for service request Status.	Working
Service: Default Group Owner Type for Service Request	Specifies the default type of group for specifying a group owner. Available values are Group Resource and Team Resource.	Group Resource
Service: Default Group Owner for Service Requests	Specifies the default value for the group service request owner displayed in the Group field. The owner must be of the type you specify in Service: Default Group Owner Type for Service Request.	None
Service: Group Owner Mandatory	A setting of Yes, makes entry in the Group field mandatory.	No
Service: Individual Owner Mandatory	A setting of Yes, makes entry of the Owner field mandatory	No

- Restricting access to the tab and individual tab functions by responsibility.

  You can specify which responsibilities can access the tab and individual tab functions by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility includes this mapping.

Description	Function
Service Request Tab - Access Service Request Tab	CS_HA_AXS_SR_TAB
Service Request Tab - Access Charges Button	CS_HA_AXS_SRT_CHARGES_BTN
Service Request Tab - Access Folder Button	CS_HA_AXS_SR_TAB_FOLDER_BTN
Service Request Tab - Access Knowledgebase Button	CS_HA_AXS_SRT_KB_BTN
Service Request Tab - Access Log Button	CS_HA_AXS_SRT_LOG_BTN
Service Request Tab - Access Schedule Task Button	CS_HA_AXS_SRT_SCHL_TASK_BTN
Service Request Tab - Access Service Request Details Button	CS_HA_AXS_SRT_DETAILS_BTN
Service Request Tab - Access View Task Button	CS_HA_AXS_SRT_VIEW_TASK_BTN
Service Request Tab - Create Service Request	CS_HA_SR_TAB_INST_SR
Service Request Tab - Update Service Request	CS_HA_SR_TAB_UPDT_SR
Service Request Tab - View Service Request	CS_HA_SR_TAB_VIEW_SR
Service Request Tab - Access Attributes Button	CS_HA_AXS_SR_ATTR_BTN

- Setting the system profile Service: Autoquery the grid in Service Request tab to display the service request history in the non-telephony mode. The default setting for this profile is No.
- You can add the following fields using the Forms Folder tool:
  - Platform
  - Database Version

- Component
- Subcomponent
- Component Version
- Subcomponent Version

Implementing the Contracts Tab

You must implement Oracle Contracts according to the procedures described in the *Oracle Service Contracts Implementation Guide*.

In addition, you can:

- Specify the date range for contracts displayed in the tab.

  Set the OKS: Contact Center Date Range profile option to the time period in days.

- Restrict access to the tab by responsibility.

  You can specify which responsibilities can access the tab by mapping the function CSCSFOKS according to the procedures described in *Oracle E-Business Suite Setup Guide*. The predefined Service responsibility maps this function and permits access.

Modifying the Behavior of the Install Base Tab

On the Install Base tab, you can:

- Specify the maximum number of Oracle Install Base instances the application displays automatically in the Query Results tab when you enter a customer in the Contact Center header.

  The application automatically populates the Query Results subtab with customer items for customers that do not own more than the number of instances you specify in the system profile CSI:IB Tab - Query Threshold. A high setting affects application performance.

  The agent can initiate a manual search with additional restrictions when it is not automatically performed.

- Restrict access to the tab and its subtabs by responsibility

  You can specify the responsibilities that can access the subtabs by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps all these functions.

  You can restrict a responsibility from accessing the Install Base tab by not mapping

either of the subtabs.

Description	Function
Access to the Query Results subtab	CSCSFIBT
Access to the Selected Results subtab	CSI_CC_SELECTED_RESULTS_TAB

- Create different actions using the Actions architecture. See Setting Up Contact Center Actions, page 36-1.

Setting Up the Invoices Tab

To display Oracle Receivables invoices on the Invoices tab of the Contact Center, you must implement Oracle Receivables as specified in *Oracle Receivables User Guide.* If agents are to use the windows accessed from the tab, including Transaction Details, Adjustment Processing, Payment Processing, and Payment Details, you must also implement Oracle Advanced Collections according to *Oracle Advanced Collections Implementation Guide*.

In addition you can:

- Specify the default time period in the From Date and To fields of the tab by setting the system profile Customer Care: Default Date Range for Invoices Tab.

  You can set this profile at the system, site, responsibility, and user level. The default setting for this profile is 30. This means, that by default, the Invoices tab displays all invoices with transaction dates within the last thirty days.

- Specify the default value for the Include Closed as selected by setting the system profile Customer Care: By Default Include Closed Invoices in Invoices Tab. The default setting for this profile Option is No.

- Restrict access to the tab and its buttons by responsibility

  You can specify which responsibilities can access the tab and buttons by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps all these functions.

Description	Function
Access to the Invoices tab	CSCSFINV

Description	Function
Access to the Transaction Details button	CSCSFTDB
Access Adjustment Processing button	CSCSFAPB
Access Payment Processing button	CSCSFPPB
Access Payment Details button	CSCSFPDB

- Modify the search criteria for invoices

  The lookup described in the following table makes it possible for you to modify the Invoice tab search criteria.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_INVOICE_FILTERBY	Customer Care: Contact Center Invoice Tab Filter By	INVOICE_NUMBER ORDER_NUMBER PO_NUMBER	Invoice Number Order Number PO Number	User

Note: The addition of new search criteria is not supported.

Modifying the Behavior of the Orders Tab

To display orders on the Orders tab of the Contact Center, you must Implement Oracle Order Management as specified in the *Oracle Order Management Implementation Manual.*

In addition, you can:

- Specify the default time period in the From Date and To fields of the Orders tab by setting the system profile Customer Care: Default Date Range for Orders Tab.

  You can set this profile at the System, Site, Responsibility, and User level. The default setting for this profile is 30. This means, that by default, the Orders tab displays all orders created within the last thirty days.

- Restrict access to the tab and its subtabs by responsibility

You can specify the responsibilities that can access the tab and subtabs by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps all these functions.

The entire tab is hidden if you do not map any of these functions.

Description	Function
Access to Order List subtab	CSCSFORD
Access to the Order Information and Line Items subtabs	CSCSFOIL
Access to the Price Summary subtab	CSCSFORS

- Specify which sales order user interface opens when agents click on the New or Details buttons.

  Setting the system profile Customer Care: Launch OM details window specifies the window. The choices are:

  - **External Order Management Form**: Use this option to open an external custom application. (The application raises a custom event which can be captured in Oracle Forms Personalization Tool or a custom.pll)
  - **Orders: Order Information sub tab**: Use this option to display the Order Information subtab.
  - **Orders: Line Items sub tab**: Use this option to display the Line Items subtab.
  - **Sales Order Form**: Use this option to open the Oracle Order Management sales window specified in the system profile: OM: Sales Order Form Preference.

    You can set OM: Sales Order Form Preference to launch either the Sales Orders, or the Quick Sales Orders windows.

- Set the Orders tab as the default when the order number is used for customer identification by ensuring the system profile Customer Care: Default Tab for Order Number Service Key is set to the Orders tab. The default setting for this profile is the Orders tab.
- Modify the search criteria

  The lookup described in the following table makes it possible for you to modify the Orders tab search criteria.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_ORDERS_FILTER_BY	Customer Care: Contact Center Orders Tab Filter By	ORDER_AMOUNT ORDER_NUMBER PRODUCT QUOTE NUMBER	Order Amount Order Number Item Quote	User

Note: The addition of new search criteria is not supported.

- Order Information and Line Items tabs are folder enabled. Hidden fields can be enabled using the Oracle Forms Folders feature.
- Specify if agents use a list or a button to launch their actions by setting the system profile OM: Display Actions Button vs. Poplist to either Poplist or Button (the default).
- Create different actions using the Actions architecture according to Setting Up Contact Center Actions, page 36-1. Please refer to the *Oracle Order Management Implementation Manual* for more details on setting up defaulting rules in the tab.

Enabling the Collateral Tab

To enable the Collateral tab of the Contact Center, which agents can use to send both physical and electronic collateral to customers and to view collateral history, you must implement Oracle One-to-One Fulfillment according to the *Oracle One-to-One Fulfillment Implementation Guide* and have the fulfilment server running.

You can:

- Specify the responsibilities that can access the tab

  Map the function CSCSFCOL according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service Responsibility includes this mapping.

- Improve the performance of collateral name searches

  This is accomplished by requiring agents to enter a minimum number of characters. You can do this by setting the system profile OTS: Minimum Number of Characters for Lookup to the number of characters you require for the search. A larger number

makes the search more specific and improves performance. By default, this system profile is set to 0.

Modifying the Behavior of the Addresses Tab

You can:

- Restrict access to the tab and its buttons by responsibility

  You can specify the responsibilities that can access the tab and buttons by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps and enables all these functions.

Description	Function
Access to the Addresses tab	CSCSFADR
Create and update addresses on the Addresses tab	CSCSFCAD
Access to the Identifying Address button on the Addresses tab. This button is used to create or change the customer's identifying address.	CSCSFIAB
Access to the Site Contact Points button on the Addresses tab. This button makes it possible to enter addresses for customer sites.	CSCSFSCP

- Specify a default country for creating addresses and set up address formats for different countries. See Specifying Global Address Formatting and Address Validation, page 27-1.

- Modify the lists of values displayed in different lists of values

  You can modify the values displayed in list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for details.

Lookup Type	Field	Type
PARTY_SITE_USE_CODE	Site Usage list of values	Extensible

Modifying the Behavior of the Contact Points Tab

You can:

- Specify the responsibilities that can access the tab and create new contact points.

  Map the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps and thus enables both functions.

Description	Function
Access to the Contact Points tab	CSCSFCPT
The ability to create contact points in the Contact Points tab	CSCSFCCP

- Modify the values displayed in different lists of values

  You can modify the values displayed in the list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for more details.

Lookup Type	Field	Type
COMMUNICATION_TYPE	Type field list of values	System
CONTACT_USAGE	Preference Topic Type list of values	User
PHONE_LINE_TYPE	Contact Method list of values	Extensible
PREFERENCE_CODE	Reference code list of values	User
REASON_CODE	Reason list of values	User

Restricting Access to the Accounts Tab and Account Details Window

You can specify the responsibilities that can access the tab and the Account Details window launched from it, by mapping the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps and enables all functions on this tab.

Description	Function
Access to the Accounts tab	CSCSFACT
The ability to create accounts on the Accounts tab	CSCSFCAT
The ability to update account information in the Accounts tab	CSCSFUAT
Access to the Details button on the Accounts tab. This button launches the Customer Account Details window.	CSCSFADB
Access to the Credit tab of the Customer Account Details window.	CSCSFCRD
Access to the Roles tab of the Customer Account Details window and the ability to create and update roles.	CSCSFROL
Access to the Sites tab of the Customer Account Details window.	CSCSFSIT
Access to the Relationships tab of the Customer Account Details window and the ability to create new relationships.	CSCSFRTB
Access to the Customer Standard button on the Accounts Tab. This button launches the Customers - Standard window.	CSCSFCSN

Modifying the Behavior of the Party Information Tab

You can:

- Specify the responsibilities that can access the tab and its different functions

  Map the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps and enables all functions on this tab.

Description	Function
Access to the Party Information tab	CSCSFPTY
The ability to update customer information on the Party Information tab	CSCSFUPI
Access to the Details button on the Party Information tab	CSCSFDBU

- Modify the values displayed in different lists of values

  You can modify the values displayed in list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for more details.

Lookup Type	Field	Type
CONTACT_TYPE	Contact Method field in the Contact Restrictions window. This window is available from the tab by clicking **Contact Restrictions**	Extensible
DEPARTMENT_TYPE	Dept Code field used in the tab when the customer is an individual	User
MARITAL_STATUS	Marital Status field used in the tab when the customer is an individual	User
YES/NO	Residence Status field used in the tab when the customer is an individual	System
CODE_STATUS	Status field	System

Lookup Type	Field	Type
SIC_CODE_TYPE	SIC Code Type field for customers of type organization	Extensible
RESPONSIBILITY	The Title field on the Person Details window available by clicking **Details** for a customer of type person	Extensible
INTEREST_TYPE	Interest Type list of values in the Person Details and Organization Details windows.	User
HZ_PERSON_IDEN_TYPE	Person Id Type list of values for customer of type person	Extensible

Modifying the Behavior of the Relationships Tab

You can:

- Specify the responsibilities that can access the tab and create relationships

  Map the functions listed in the following table according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility maps and enables both functions.

Description	Function
Access to the Relationships tab	CSCSFREL
The ability to create relationships on the Relationships tab.	CSCSFCRE

- Modify the values displayed in different lists of values

  You can modify the values displayed in list of values by modifying the lookups listed in the following table. Please refer to Oracle Account Receivables documentation for more details.

Lookup Type	Field	Type
PARTY_RELATIONS_TYPE	Sets up the list of relationships between individuals and organizations.	Extensible
CODE_STATUS	Dept Code field used in the tab when the customer is an individual	System
RESPONSIBILITY	Marital Status field used in the tab when the customer is an individual	Extensible

Modifying the Behavior of the Contact Center Header

To modify the behavior of the Contact Center header, you can:

- Prevent users or groups of users from modifying a customer name displayed in the Contact Center header

  Set the system profile HZ: Change Party Name to No. By default, this system profile is set to Yes. You can set this profile at the site, application, or individual user level.

- Select to view details of customer or contact information

  Make a selection from the View Details For list, to specify whether they want to view customer or customer contact information in the Contact Center tabs.

  However, the following tabs are limited to displaying details on customers only:

  - Interactions
  - Tasks
  - Contracts
  - Invoices
  - Collateral
  - Accounts
  - Install Base

- Order Information and Line Items

You can specify the default setting of the View Details For list by setting the system profile Customer Care: Default View By in Contact Center to either Customer or Contact. By default this profile is set to Customer.

- Specify whether you want to include inactive accounts in the list of accounts

  The system profile Customer Care: Display Only Active Accounts in Contact Center determines whether inactive accounts are shown in the Acct Num field LOV of the Contact Center. A setting of Yes shows only active accounts. A setting of No includes inactive accounts as well. By default, this system profile is set to Yes.

- Specify whether you want to display inactive customer records

  The system profile Customer Care: Display Only Active Customers in Contact Center determines whether inactive customers are included in the Name LOV. A setting of Yes restricts the list to active parties. A setting of No includes inactive customers as well. By default, this system profile is set to Yes.

- Default the first customer account in the Acct Num field

  Set the system profile Customer Care: Default the First Customer Account in Contact Center Header to Yes to display the first default customer account record in the database in the Acct Num field of the Contact Center header. A setting of No leaves the field blank. By default, this system profile is set to Yes.

- Specify the default country for filtering records in the Contact Center.

  Set the system profile Customer Care: Restrict Searches to a Specific Country to specify whether customer searches in the Contact Center are limited, by default, to a specific country. The default profile is None.

- Specify the default party type on Contact Center header.

  Set the system profile Customer Care: Default Customer Type on Contact Center to determine the default value for the Type field within the Customer region on the Contact Center header. The default profile is Organization.

- Specify the default contact type in the Contact Center header.

  Set the system profile Customer Care: Default Contact Type For Contact Center to determine the default value in the Contact Type field. The valid values are Contact (the default setting) and Employee.

- Specify the default customer in the Contact Center header.

  When you enter an employee contact, you can display the default customer by setting the system profile Service: Default Customer Name. This profile specifies the default entry in the Customer field of the Contact Center header.

- Specify the default tab for Contact Center.

  Set the default value on the system profile Customer Care: Default Tab for Contact Center to determine the default tab when Contact Center form is opened. The default profile is Dashboard.

- Specify the default service key for searches

  See Setting Up Service Key Search Preferences, page 35-1 for setup details.

- Speed up customer searches by phone number by requiring agents to enter a minimum number of digits

  The system profile Customer Care: Minimum Number of Characters for Phone Search specifies the minimum number of phone number digits agents must enter in the Phone field in the Contact Center header when they search for a customer using the phone number. This search matches the concatenated phone number, ignoring any spaces or other delimiters. Greater number of digits improve search performance. By default, no number is specified.

- Specify the default title for contacts

  Customer Care: Default Title for a Person defaults the title for the contact in the Contact region of the Contact Center header. There is no predefined default value.

- Modify the text of the View Details For list

  The system lookup described in the following table makes it possible for you to modify the text agents can see in the View Details For list (Meaning column.)

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_VIEW_BY	Customer Care: View by's in Contact Center form	CONTACT	Contact	System
		CUSTOMER	Customer	

- Modify the values displayed in different lists of values

  You can modify the values displayed in a number of other fields by modifying the following Oracle Account Receivables lookups:

  - PARTY_TYPE
  - CONTACT_TITLE
  - PHONE_LINE_TYPE

- CODE_STATUS
- PARTY_RELATIONS_TYPE
- SITE_USE_CODE
- PARTY_SITE_USE_CODE

Please see Oracle Receivables documentation for details.

- Enable users to select party site in Contact Center header

  You can select addresses belonging to the selected customer in the Contact Center header using the Customer Address list.

  You can also query for customers based on site name, site number, or addressee. The customer address information is automatically displayed based on the selected site name, addressee, or site number. The customer site fields are enabled at the folder level.

  If a customer is not selected, then you can select an address from the list of addresses for active party sites and the customer party.

- Attach files to a customer, contact, or employee

  You can attach files to a customer by clicking the attachment icon on the toolbar. These files are available to all contacts of a customer. The attachment icon is enabled when you select a customer, combination of customer and contact, or employee based on the primary keys defined for the Contact Center header.

  See Enabling Attachments in the Contact Center, *Oracle E-Business Suite Developer's Guide.*

Enabling Attachments in the Contact Center

You can enable attachments in the Contact Center window for a customer, contact, and employee. You can add, update, and delete attachments.

1. Under the Application Developer responsibility, navigate to Attachments, and select Attachment Functions.

   The Attachment Functions window appears.

2. Query for Contact Center function.

3. Enter the name as CSCCCCRC.

4. Click Blocks.

5. . Select the CUSTOMER_HEADER_BLK block.

6. Click Entities.

7. Click Blocks.

8. Click the Primary Key Fields tab.

9. . Do any of the following:

To…	Enter...
Attach a file at the customer level, which must be available for all contacts of the customer.	CUSTOMER_HEADER_BLK.CUST_PARTY_ID as Key 1
Attach a file at the contact level, which must be available only for a specific combination of customer and contact	CUSTOMER_HEADER_BLK.CUST_PARTY_ID as Key 1 and CUSTOMER_HEADER_BLK.CONT_PER_PARTY_ID_C as Key 2
Attach a file at the employee level	CUSTOMER_HEADER_BLK.CONT_PER_PARTY_ID_C as Key 1

10. Save your work.

For more information, see Attachments, *Oracle E-Business Suite Developer's Guide*.

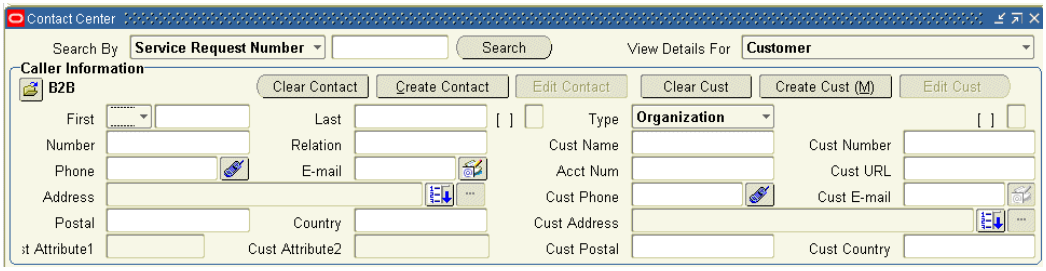
Configuring the Contact Center Header

You can use the standard Forms folder tools to specify the fields appear in the Contact Center header. By default, the Contact Center header is set up to display both customer and contact information. For business to consumer implementations, you can change the header to display only customer information, for example.

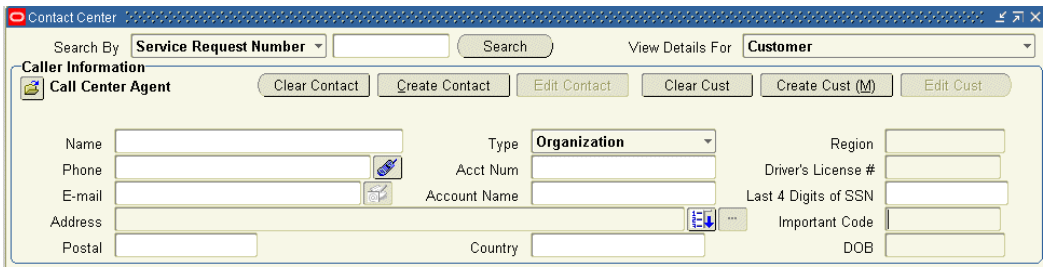
You can also use the folder tool to display the values entered in the header's Party Information descriptive flexfield. These fields display the values only, agents must make their entries via the flexfield itself.

> **Note:** Customer related fields are prefaced with "Cust". The remaining fields pertain to the contact.

Here is a sample business-to-business header showing both customer and contact information header:



And a sample header set up for agents handling consumers requests:



35

Contact Center Search Preferences

This chapter covers the following topics:

- Setting Up Contact Center Search Preferences
- Setting Up Service Key Search Preferences
- Limiting Searches to a Specific Country
- Modifying the List of Service Keys Used for Searches
- Extending the Service Key Search
- Specifying the Default Values in the Customer Search Window

Setting Up Contact Center Search Preferences

You can customize searches in the Contact Center by:

- Setting Up Service Key Search Preferences, page 35-1
- Limiting Searches to a Specific Country, page 35-4
- Modifying the List of Service Keys Used for Searches, page 35-4
- Configuring Customer Search Window Defaults, page 35-5

Setting Up Service Key Search Preferences

Agents can display customer information in the Contact Center by entering any one of the following pieces of uniquely identifying information, called service keys:

- Contract Number
- Instance Name
- Instance Number

- Invoice Number
- Order Number
- RMA Number
- Serial Number
- Service Request Number
- Social Security Number
- System
- Tag Number

Agents can enter the service key either in the Contact Center header or the Customer Search window.

If the implementation includes an IVR system, the service key can also be entered directly by customers themselves.

The application displays customer contact information only for service request numbers. In this case, the contact displayed is the contact associated with the service request. If the contact for the service request is an internal employee, the application displays customer information only.

You can specify:

- The default service key for agent searches by setting the system profile Customer Care: Default Contact Center Service Key to any one of the ten service keys. The value that is specified in profile option appears by default in the Search By list in the Contact Center header and Customer Search windows.
- Agents see the tab when they perform a service key search.

  You can specify the tab that by default displays for each service key by setting the profile options listed in the following table:

Profile Name	Description	Possible Settings	Default Value
Customer Care: Default Tab for Service Request Number Service Key	Default tab to be displayed when the Service Key is a service request number	All tabs	Service Request tab

Profile Name	Description	Possible Settings	Default Value
Customer Care: Default Tab for Order Number Service Key	Default tab to be displayed when the Service Key is an order number	All tabs	Orders tab
Customer Care: Default Tab for RMA Number Service Key	Default tab to be displayed when the Service Key is an RMA number	All tabs	Service Request tab
Customer Care: Default Tab for Invoice Number Service Key	Default tab to be displayed when the Service Key is an Invoice number	All tabs	Invoices tab
Customer Care: Default Tab for Contract Number Service Key	Default tab to be displayed when the Service Key is a Contract number	All tabs	Contracts tab
Customer Care: Default Tab for Serial Number Service Key	Default tab to be displayed when the Service Key is a Serial number	All tabs	Service Request tab
Customer Care: Default Tab for Tag Number Service Key	Default tab to be displayed when the Service Key is Tag number	All tabs	Service Request tab
Customer Care: Default Tab for System Service Key	Default tab to be displayed when the Service Key is a System number	All tabs	Service Request tab
Customer Care: Default Tab for Instance Name Service Key	Default tab to be displayed when the Service Key is an Instance Name	All tabs	Install Base tab

Profile Name	Description	Possible Settings	Default Value
Customer Care: Default Tab for Social Security Number Service Key	Default Contact Center tab displayed when the Service Key a user enters is a social security number	All tabs	Dashboard tab

Limiting Searches to a Specific Country

You can limit all searches to customers in a specific country by setting the system profile Customer Care: Default Country for Filtering Records in the Contact Center to a country of your choice. By default, this profile is null. This means that searches are not restricted by country.

Modifying the List of Service Keys Used for Searches

The following lookup makes it possible for you to modify the values in the Search By list that agents use to select a service key for a search in the Contact Center.

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CC_DEFAULT_SERVICE_KEY	Customer Care: Default Contact Center Service Key Lookup	CONTRACT_NUMBER	Contract Number	User
		EXTERNAL_REFERENCE	Tag Number	
		INSTANCE_NAME	Instance Name	
		INVOICE_NUMBER	Invoice Number	
		ORDER_NUMBER	Order Number	
		RMA_NUMBER	RMA Number	
		SERIAL_NUMBER	Serial Number	
		SERVICE_REQUEST_NUMBER	Service Request Number	
		SSN	SSN	
		SYSTEM_NUMBER	System	

Extending the Service Key Search

You can extend the service key search using user hooks. The following steps provide guidelines to extend the service key search:

To extend the service key search:

1. Verify that the CSC_Service_Key_CUHK package body has been created before enabling the service key user hook.

   Note: After the Customer User Hook is enabled, the custom code written in CSC_Service_Key_CUHK package body is the only code executed. This means that none of the original product is executed after you enable the service key search customer user hook.

2. Set the execute_flag column value to Y in the JTF_USER_HOOKS table for the Customer User Hook that should be enabled.

   You can use the following script to enable the Service Key search customer user hook:

```
UPDATE jtf_user_hooks SET execute_flag = 'Y'
    WHERE pkg_name = 'CSC_SERVICE_KEY_PVT'
    AND api_name = 'SERVICE_KEY_SEARCH'
    AND processing_type = 'B'
    AND user_hook_type = 'C'
```

Specifying the Default Values in the Customer Search Window

You can modify the behavior of the Customer Search window in two ways:

- Force agents to use the search window whenever they open the Contact Center

  By setting the system profile Customer Care: Display Customer Search Window by Default to Yes, you can have the Customer Search window appear by default each time an agent launches the Contact Center, forcing the agent to search customer records before creating a new customer record.

- Specify whether you want to display the Basic or Advanced search tab of the Customer Search window, by default.

  This is accomplished by setting the system profile Customer Care: Default Tab in Customer Search Window to the tab of your choice. By default, this profile is set to Basic.

36

Setting Up Contact Center Actions

This chapter covers the following topics:

- Actions Architecture Overview
- Setting Up Actions for Contact Center's Install Base Tab
- Setting Up Actions for Contact Center's Orders Tab

Actions Architecture Overview

The Install Base and Orders tabs of the Contact Center include actions agents can use to speed up tasks such as the creation of service requests for an install base item or the creation of a new item instance.

You can use Personalization to create new actions of your own or add code using the CUSTOM.pll stub library.

You can create different sets of actions for different classes of users (which menu is available for which user is determined by setting a system profile option.)

You have more flexibility when you use the CUSTOM.pll stub library because it has complete access to all PL/SQL and SQL. However, Personalization can handle the vast majority of your changes.

Form Personalization and CUSTOM library changes can coexist. Whenever an event is fired, Personalization processes them first, then passes them to the CUSTOM library.

Personalization makes it possible for you to alter the behavior of the Contact Center and Service Request windows, including changing properties, executing built-ins, displaying messages, and adding menu entries. For each function (a form running in a particular context based on parameters passed to it), you can specify one or more rules. Each rule consists of an event, an optional condition and its scope, and one or more actions to perform.

To use Form Personalization you must be familiar with Oracle Forms, including the PL/SQL programming language, and the *Oracle E-Business Suite Developer's Guide*. Additionally, any change you make can interfere with the base code of a form (the code

that Oracle ships).

Actions on the Install Base Tab

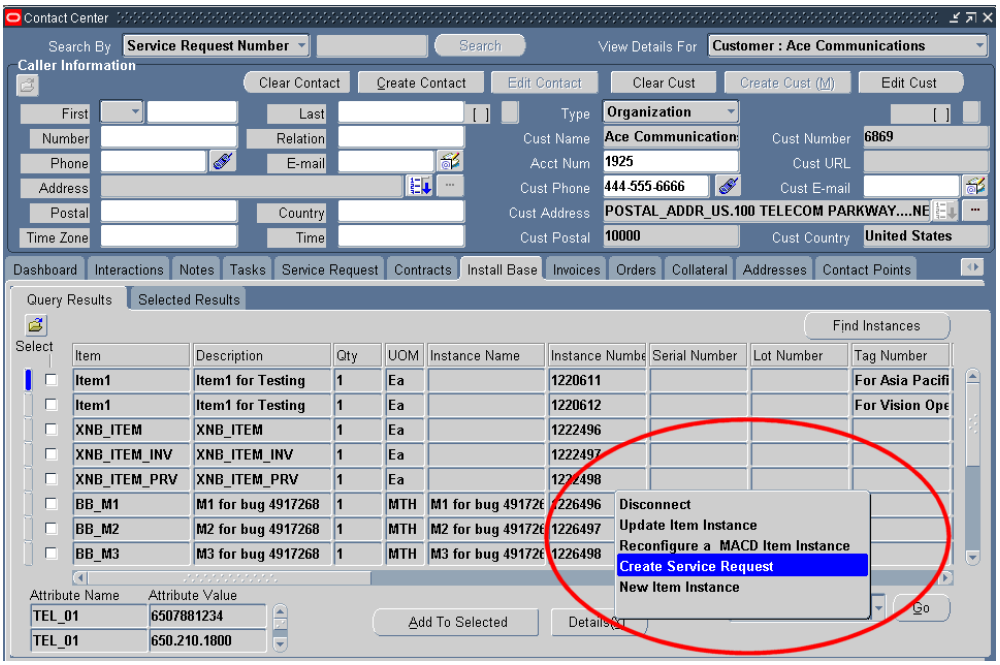
The following actions are available to agents in the Install Base tab:

Action	Description
Disconnect	Intended for telecommunications customers only: Creates an order to disconnect telephone service. See *Oracle Telecommunications Ordering Process Guide* for details.
Update Item Instance	Displays in a new browser window the item in the Item Instance Details page (Oracle Install Base) where the agent can make updates.
Reconfigure a MACD Item Instance	Intended for telecommunications customers only: brings up Oracle Configurator where agents can reconfigure the customer telephone services. See *Oracle Telecommunications Ordering Process Guide* for details.
Create Service Request	Opens up the Service Request tab of the Contact Center and populates a new service request with the selected install base item.
New Item Instance	Displays in a new browser window the Create Item Instance page (Oracle Install Base).

Here is how the Create Service Request action works:

1. An agent reviews the items the customer owns on the Install Base tab.
2. Selects a serviceable item.
3. Creates a service request for it by choosing **Create Service Request** from a drop-down menu highlighted in the image below.

   Note: Although the user interface permits the selection of multiple items, agents can create a service request for only one item at a time.

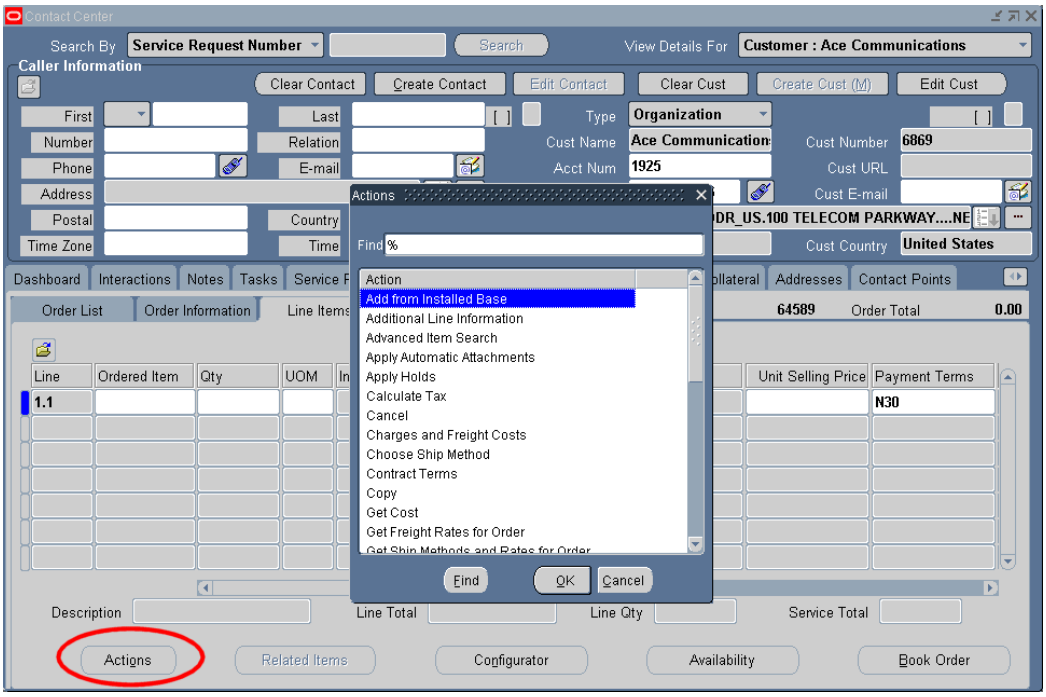


4. Click **Go** to open the Service Request tab with the item populated in the new service request.

Actions on the Orders Tab

The Orders tab includes only one predefined action: Add from Installed Base. This permits agents to add new instances on the Create Item Instance page of Oracle Install Base.

This action is added to actions already available to Oracle Order Management users as shown on the image below:



You must extend or disable any of the Oracle Order Management actions separately according to the procedures described in that product's documentation.

Note that the user procedure is slightly different on this tab: Agents must display the order details by drilling down on an order in the tab and then click the Actions button (highlighted in the image above).

Setting Up Actions for Contact Center's Install Base Tab

Use these guidelines to set up actions for the Oracle TeleService Contact Center's Install Base tab.

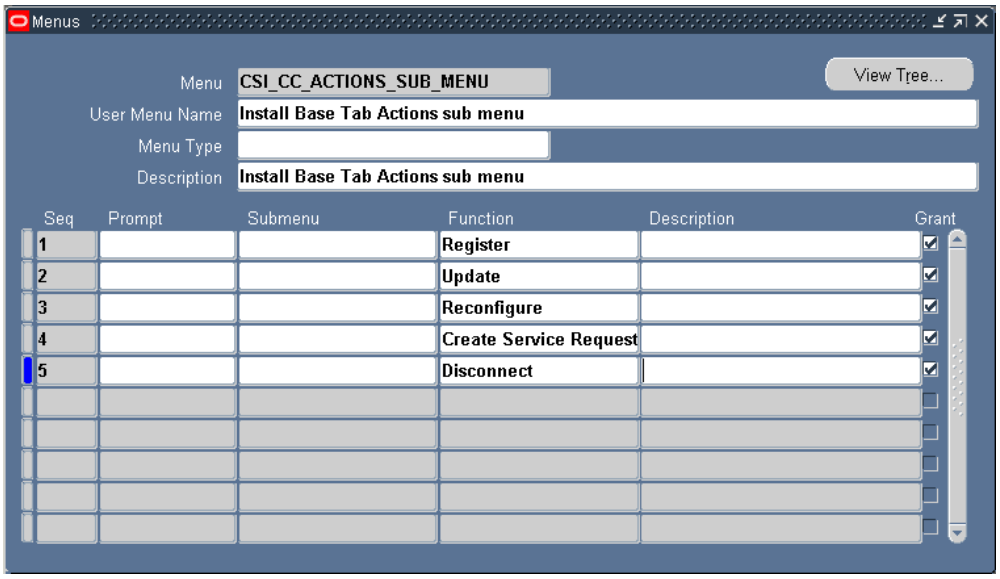
Prerequisites:

Familiarity with Oracle applications architecture and Personalization.

To set up actions for the Install Base tab:

1. Under the Application Developer responsibility, create the function (the action itself). Note that agents see the text of the description you enter here when choosing the action in the drop-down list.)

2. You can create a new menu or add the new function to menu CSI_CC_ACTIONS_SUB_MENU (User Menu Name: Install Base Tab Actions sub menu). The image below shows the seeded menu:



3. Use Personalization or the CUSTOM.pll to write the code. The trigger event when a user clicks the Go button is: CSC_IB_TAB_ACTION_EVENT.

4. Set the system profile CSI: IB Tab - Action Menu to the menu you want to use. Note that the List of Values displays the menu's User Menu Name. For the seeded menu: "Install Base Tab Actions sub menu".

   You can create multiple menus with different actions for different users and use this system profile to specify which responsibility sees which menu.

Setting Up Actions for Contact Center's Orders Tab

Use these guidelines for setting up actions for the Oracle TeleService Contact Center's Install Base tab.

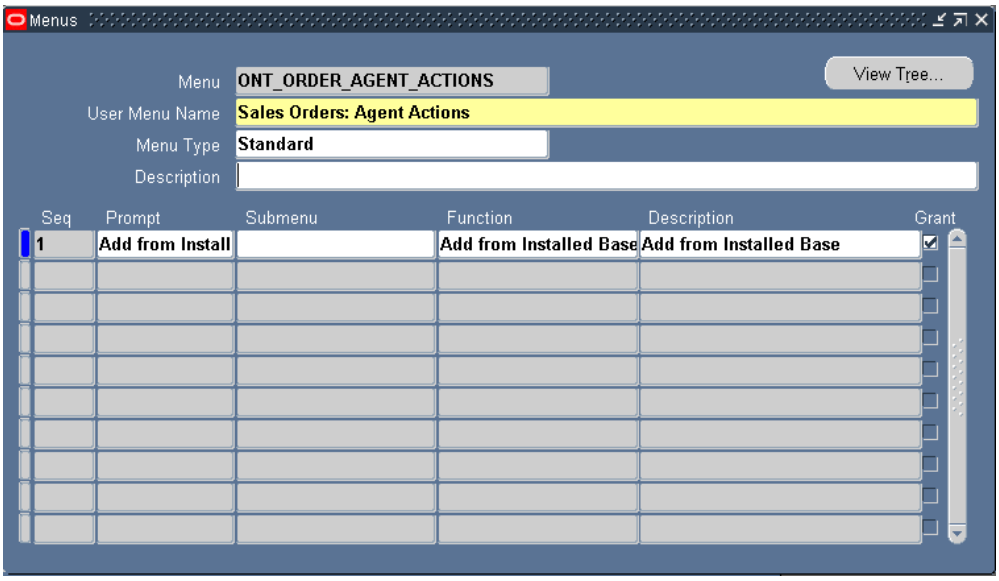
Prerequisites:

Familiarity with Oracle applications architecture and Personalization.

To set up actions for the Orders tab:

1. Under the Application Developer responsibility, create the function (the action itself). Note that agents see the text of the description you enter here in the Actions list.

2. You can create a new menu or add the new function to menu ONT_ORDER_AGENT_ACTIONS (User Menu Name: Sales Orders: Agent Actions). The image below shows the predefined menu:



3. Use Personalization or the CUSTOM.pll to write the code. The trigger event when a user clicks the Actions button is: OM_PRE_ACTION_EVENT.

4. Set the system profile OM: Contact Center Actions Menu Name to the menu you want to use. Note that the List of Values displays the menu's User Menu Name. For the predefined menu: "Sales Orders: Agent Actions".

   You can create multiple menus with different actions for different users and use this system profile to specify which responsibility sees which menu.

37

Additional Contact Center Setups

This chapter covers the following topics:

- Setting Up Criteria to Flag Customers as Critical
- Specifying the Default Values for the Override Customer Criticality Window
- Setting Up Quick Menu
- Setting Up Wrap-up
- Setting Up Party and Account Numbering
- Enabling E-Mail for the Contact Center
- Enabling Oracle Knowledge Management
- Enabling Oracle Scripting

Setting Up Criteria to Flag Customers as Critical

Customers are automatically flagged as critical whenever a customer meets conditions defined in a customer profile check.

The application includes the predefined boolean customer profile check Critical Customer. It flags a customer as critical if the customer has more than five open service requests.

You can change the criteria by modifying the predefined customer profile check or by creating a new one altogether as outlined in Customer Profile Setup Process Overview, page 22-6. You must select any new profile to be used for criticality checking in the system profile Customer Care: Profile Check for Determining Customer Criticality.

Agents can manually reset the criticality of a customer making a noncritical customer as critical or vice versa and view the audit history of such manual overrides. See Specifying the Defaults for the Override Customer Criticality Window, page 37-2.

Window

Agents can use the Override Customer Criticality window to change the status of a customer to critical or to remove the customer from the critical list. You can:

- Modify the customer profile check to determine if a customer is critical.

  See Setting Up Criteria to Flag Customers as Critical, page 37-1.

- Modify the list of reasons agents can give when they change the criticality of a customer.

  You can modify the list by updating the lookup described in the table below:

Lookup Type	Meaning	Lookup Code	Meaning	Level
CSC_CRITICUST_OVERRIDE_REASONS	Reasons to override Customer Criticality	CRUCIAL_IMPLEMENTATION	Crucial Implementation	User
		DELICATE_SITUATION	Delicate Situation	

Setting Up Quick Menu

Quick menu is based on the predefined filters. Filters have a many to many relationship with AOL functions and are seeded in the Quick Menu tables. This section defines the association of the filter with its function in AOL.

For the Service responsibility, the Quick Menu is already setup.

To familiarize yourself with the quick menu setup:

1. View the profile values:
   1. Open the System Profile Values window from the navigator.
   2. Query on the system profile Customer Care: Start Menu in Quick Menu.
   3. The default value is `Quick Menu for Customer Support`.
2. Verify the AOL menu for quick menu:
   1. Using the Application Developer Responsibility, navigate to Application, Menu.

      The Menus window appears.

2. Run a query to open the seeded menu CSX_CUSTOMER_SUPPORT_QM.

3. View the results of the query.

4. Close the window.

3. Configure the Quick Menu.

   You can configure a different quick menu for each responsibility by adding or deleting Quick Menu enabled forms.

   The predefined quick menu displays all quick menu enabled forms:

   - Manage Critical Customer
   - Maintain Relationship Plans
   - Order Capture (Order Quoting - Forms)
   - View Customer Product
   - Maintain Systems
   - Contact Center
   - Service Request
   - Depot Repair

   The following item is not quick menu enabled as it uses the HTML interface:

   - Search Knowledge Base

     You can add any additional form function to the Quick Menu, even though the form function is not quick menu enabled. This enables you to quickly navigate to the form, but the variables in the original form are not passed to the form on the quick menu. Only quick menu enabled forms can accept variables from the original form.

     Note: Do not use the colon in any menu name or description for the QuickMenu. The ":" is a reserved character and must not be used.

Setting Up Wrap-up

Agents record their interactions with customers using the Call Wrap Up window. You can use this procedure to make call wrap-up mandatory or optional and to specify what

information is recorded by default.

Prerequisites:

Every interaction between an agent and a customer and each action an agent takes can have multiple outcomes, each outcome can have multiple results, and each result can have multiple reasons.

You must set up the outcome, results, and reasons and their possible combinations by following the procedures described in the *Oracle Customer Interaction History Implementation Guide*.

To set up interaction wrap-up:

1. Under the Service responsibility, navigate to Others, and select Profile System Values.

2. To make wrap-up mandatory for every agent interaction with the customer in the Contact Center, set the system profile Customer Care: Make Call Wrap Up Mandatory in Contact Center to **Yes**. By default wrap up is optional and this profile is set to **No**.

3. To make wrap up mandatory for agent interactions in the Service Request window, set the system profile Service: Make Call Wrap Up Mandatory in Service Request to Yes. A setting of No makes entry optional.

4. Set the system profile Default Interaction Wrap-Up Combination for Contact Center to the combination of outcome, result, and reason codes you wish to use by default for interactions.

   The list of values lists all of the wrap-up combinations of outcome, result, and reason codes you have created. See the wrap-up section of the *Oracle Customer Interaction History Implementation Guide.*

5. Set the system profile Customer Care: Default Value for Wrap-Up Activities to the combination of outcome, result, and reason codes you wish to use by default for each activity recorded by the agent.

Setting Up Party and Account Numbering

Party numbers and account numbers can be generated manually or automatically.

To setup party and account numbering:

1. Set up automatic account numbering:

   1. Select an Oracle Receivables responsibility and navigate to System, and select System Options.

The System Options window appears.

2. Open the Trans and Customers tab.

3. Check the Automatic Customer Numbering check box to have the application generate customer account numbers automatically.

   Note: Although this number is referred to as Customer Number in Oracle Receivables, this number is referred to as Account Number in Oracle TeleService.

2. Set the HZ: Generate Party Number system profile option to Yes to enable automatic party number generation in Oracle TeleService.

Enabling E-Mail for the Contact Center

E-mail functionality in the Contact Center is provided through the Oracle Email Center. Please see Implementing Oracle Email Center and E-Mail Templates, page 17-1 for further details.

Enabling Oracle Knowledge Management

To enable knowledge searches within the Contact Center you must implement the Oracle Knowledge Management service foundation module according to the procedures described in *Oracle Knowledge Management Implementation and Administration Guide*.

The *Knowledge: Search to display for integrating applications* profile option must be set to enable Knowledge Management in Oracle TeleService. The values for the profile option are *Simple Search*, *Advanced Search*, and *InQuira Search*.

You can specify which responsibilities can:

- Access the Knowledge Base Search icon in the toolbar, by mapping the function Access Knowledge Base Icon (CSCSKBIC) according to the procedures described in *Oracle E-Business Suite Setup Guide.*

- Access the Search Knowledge button within the Service Request tab, by mapping the function Service Request Tab - Access Knowledgebase Button (CS_HA_AXS_SRT_KB_BTN), according to the procedures described in *Oracle E-Business Suite Setup Guide.*

  The predefined Service responsibility includes these mappings and thus enables the searches.

Enabling Oracle Scripting

You must create scripts and implement scripting according to the procedures described in *Oracle Scripting Developer's Guide*, *Oracle Scripting Implementation Guide*, and the *Oracle Scripting User Guide*.

In addition, the system profiles in the following table enable Oracle Scripting in the Contact Center and modify the performance of scripts.

The table columns are explained as follows:

- System Profile Name: The system profile name. An asterisk (*) next to a profile name indicates the profile is new.
- Description: A description
- Level: A list of abbreviations representing the different levels at which the profile can be set:
  - S: Site
  - A: Application
  - R: Responsibility
  - U: User
- Default Setting and Level: The predefined default setting and the predefined level.

System Profile Name	Description	Level	Default Setting and Level
Customer Care: Automatically Launch a Script for Identified Callers	This profile defaults a script in the Oracle Scripting window used to launch a script.	S,A,R,U	None Default Level: S
CSC: Server Machine for Oracle Scripting	Name of the host computer where the scripting server resides.	S,A,R,U	None Default Level: S
CSC: Port for Oracle Scripting Application	Port for communicating with the scripting server.	S,A,R,U	None Default Level: S

System Profile Name	Description	Level	Default Setting and Level
CSC: SID of Oracle Scripting Database	The database used to support the scripting tool.	S,A,R,U	None
CSC: Oracle Scripting Three Tier Installation	Specifies if the scripting server is a two- or three-tier installation.	S,A,R,U	None

38

Enabling Telephony

This chapter covers the following topics:

- About Telephony Integration in Oracle TeleService
- Implementing Direct Contact Center Integration with CTI Applications
- Enabling Direct CTI Telephony Integration in the Contact Center
- Implementing Contact Center Telephony through Oracle Telephony Applications
- Contact Center IVR Parameters, Call Reasons, and Window Behavior
- Service Request IVR Parameters, Call Reasons, and Window Behavior

About Telephony Integration in Oracle TeleService

Telephony integration makes it possible for agents working in the Contact Center and the Service Request windows to receive screen windows displaying customer information and to automatically start interactions when they accept a call from a customer.

You can implement telephony integration for Oracle TeleService via:

- Oracle Advanced Inbound, Oracle Advanced Outbound, and the Oracle Universal Work Queue

  If you are implementing telephony with these applications, you can display the Contact Center window, the Service Request window, or both, depending on the rules that you set up.

- Direct integration with third party CTI software.

  If you are implementing direct CTI integration as described in this chapter, you can display the Contact Center window, the Service Request window, or both.

The application automatically records all screen windows in interaction history regardless of the telephony integration method that you choose. Agents can view past interactions with customers on the Interactions tab of the Contact Center window.

Implementing Telephony in the Service Request Window

To enable telephony in the Service Request window, follow one of the implementation guidelines in this chapter depending on your implementation method:

- Enabling Direct CTI Telephony Integration in the Contact Center, page 38-6
- Implementing Contact Center Telephony via Oracle Telephony Applications, page 38-9

You must specify the integration method you are implementing by setting the system profile Customer Care: Telephony Screen Pop Mode.

For a list of IVR parameters, call reasons, and supported window behavior, see Service Request IVR Parameters, Call Reasons, and Window Behavior, page 38-20.

For an understanding of key user procedures, see User Procedures in Oracle Telephony Applications, page 57-1.

Implementing Telephony in the Contact Center Window

To enable telephony in the Contact Center window, follow one of the implementation guidelines in this chapter depending on your implementation method:

- Enabling Direct CTI Telephony Integration in the Contact Center, page 38-6
- Implementing Contact Center Telephony via Oracle Telephony Applications, page 38-9

You must specify which integration method you are implementing by setting the system profile Customer Care: Telephony Screen Pop Mode.

For a list of IVR parameters, call reasons, and supported window behavior, see Contact Center IVR Parameters, Call Reasons, and Window Behavior, page 38-10.

For an understanding of key user procedures when you implement the telephony integration via Oracle telephony applications, please see User Procedures in Oracle Telephony Applications, page 57-1.

Implementing Direct Contact Center Integration with CTI Applications

Direct integration with third party CTI software provides faster screen windows than integration by Oracle telephony applications. However, direct integration does not support "warm transfers", the ability to transfer caller information between agents, a feature of Oracle Advanced Inbound.

This section explains how you can implement direct integration with third party CTI applications. It consists of:

- An overview of the technology, page 38-3
- An overview of the login procedure, page 38-4
- An overview of the call flow, page 38-5
- A general procedure for setting up the integration, page 38-6

Direct Integration with CTI Applications Overview

Both the Contact Center window and the Service Request window can be enabled for direct telephony integration. Implementing a direct integration between third party CTI applications and an enabled window makes it possible for you to refresh the enabled window based on CLI (Calling Line Identification), DNIS (Dialed Number Identification Service), and IVR (Interactive Voice Response) inputs from any CTI application.

XML format messaging makes the integration suitable for use with any third party software. You can perform the integration from either the CTI client or from middle ware.

The direct integration improves performance over the use of Oracle Advanced Inbound. This is especially important for high volume call centers.

The integration uses a message signature that is consistent with the Basic SDK, simplifying migration for customers who have integrated using the Basic SDK.

The implementation involves a subset of the steps outlined in the Basic Integrations chapter of the *Oracle Telephony Adapter SDK Developers Reference Guide*.

Direct integration supports:

- Screen Windows
- Call Release
- Integrated Log In and Log Out

The integration does not support:

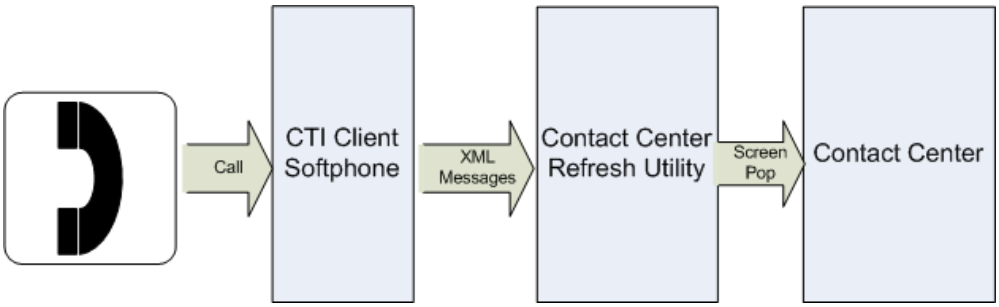
- Launching the window itself. The window is refreshed with each call, but the agent must open it first.
- Transferring customer data with a call transfer between agents ("Warm Transfers"). Warm transfers are possible with Oracle Advanced Inbound.
- Call control. Call control must be provided through the CTI application.

A sample of how it works, using the Contact Center window is given below:

1. The incoming call lands on the CTI application client softphone.

2. The CTI application invokes the Contact Center Refresh Utility and passes the call data parameters using XML messaging.

3. The Contact Center Refresh Utility displays the relevant customer data in the Contact Center window.



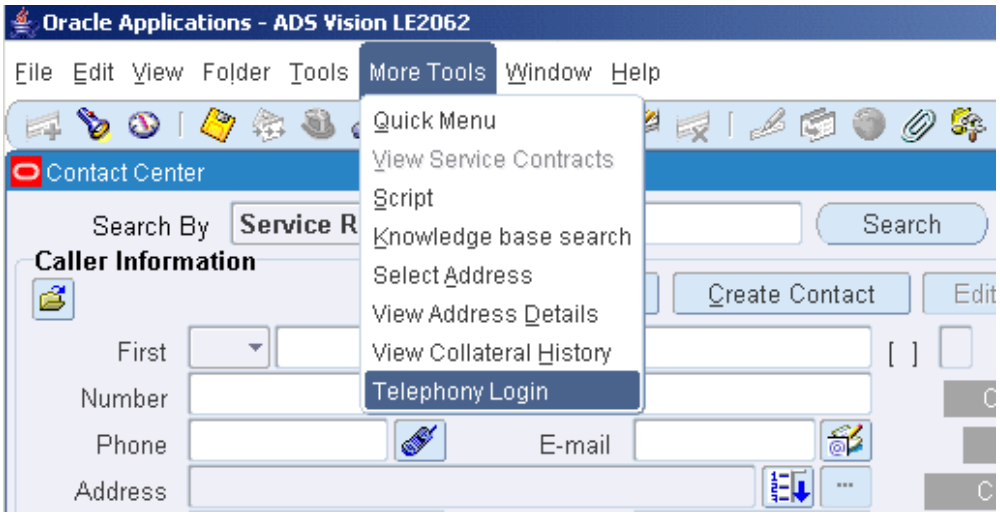
Login Sequence for the Contact Center Window

The login sequence, using the Contact Center window is as follows:

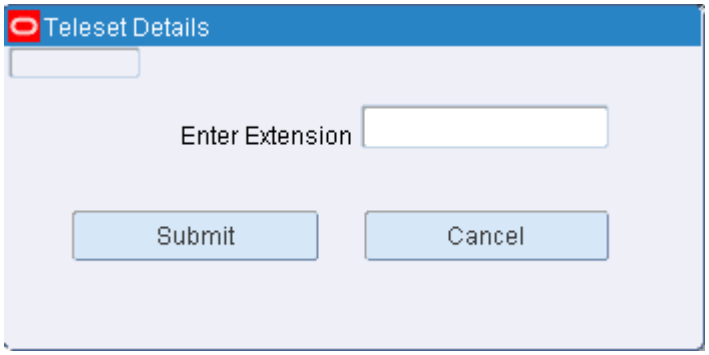
1. An agent logs in to the CTI client softphone in an unavailable status (so they do not immediately start receiving phone calls).

2. The agent logs in to Oracle applications and opens the Contact Center.

3. The agent chooses **Telephony Login** from the More Tools menu as shown in the following image. (In the Service Request window, the Telephony Login choice appears on the Tools2 menu.)



4. The agent enters the extension in the Teleset Details window.



5. The Contact Center Refresh Utility sends the Telephony Login message to the CTI switch.

6. The CTI switch enables the CTI softphone.

> **Note:** Agents can also log into Oracle Applications before logging into the CTI client. In this case, the agents must manually make themselves available on the CTI client.

Call Flow Sequence for the Contact Center Window

The flow for incoming calls is as follows:

1. An agent accepts a call on the CTI softphone.

2. The softphone sends an XML message with the customer information to the Contact

Center Refresh Utility and changes into an unavailable mode.

3. The Contact Center Refresh Utility refreshes the Contact Center with customer information, starts and interaction, and changes into an unavailable mode.

4. When an agent ends the interaction, either by doing a call wra- up or by clicking the End Interaction icon in the toolbar, the utility sends the end interaction message to the CTI softphone causing it to become available again.

Enabling Direct CTI Telephony Integration in the Contact Center

This topic covers the steps to enable the direct integration that you have implemented.

To enable direct telephony integration:

1. Set the system profile Customer Care: Telephony Screen Pop Mode is to Direct.

2. To enable the Contact Center window, set Customer Care: Enable Integrated Telephony Login to Yes, to send the login details to the CTI system.

   A setting of No (the default) does not send the login details.

3. To enable the Service Request window, set Service: Enable Integrated Telephony Login to Yes. This setting sends login details to the CTI system.

   A setting of No (the default) does not send the login details.

4. Perform the following basic SDK setups. (Some are required and some optional as indicated in parentheses.) These setups are described in detail in the Basic Integrations chapter of the *Oracle Telephony Adapter SDK Developers Reference Guide*.

   1. Set the following system profiles:

      - CCT: Basic Telephony Listener Port (Optional)
      - CCT: Basic Telephony: Reconnect Interval (Optional)
      - CCT: Basic Telephony: Third Party URL (Required)

   2. Set up the following callouts:

      - Register (required)
      - Unregister (required)
      - Login (optional)
      - Logout (optional)

3. To enable direct telephony integration with the Contact Center window, set up the following events:

   - CallReleased (optional)

   - ScreenPop (required)

     The application sends a message to the Refresh utility when an agent accepts the call. The utility triggers the refresh of the Contact Center based on the defined parameters. If multiple customers match the defined parameters, then, the application displays the matches for agents to choose from or to initiate a customer search. If no customers match the parameters, the application displays a blank Contact Center window.

     The call parameters include both phone numbers and the service keys. You can use the following parameters in the message:

IVR Parameter	Internal Name for Use with the XML Message
Account Number	AccountCode
ANI	occtANI
Contact Number	ContactNum
Contract Number	ContractNum
Customer Number	CustomerNum
Employee ID Number	employeeID
Instance Name	InstanceName
Instance Number	InstanceNum
Invoice Number	InvoiceNum
Order Number	OrderNum
RMA Number	RMANum
Serial Number	SerialNum

IVR Parameter	Internal Name for Use with the XML Message
Service Request Number	ServiceRequestNum
Social Security Number	SocialSecurityNumber
System Name	SystemName
TAG Number	TagNumber

5. To enable direct telephony integration with the Service Request window, set up the following events:

   - CallReleased (optional)
   - ScreenPop (required)

     The application sends a message to the Refresh utility when an agent accepts the call. The utility triggers the refresh of the Service Request window based on the ranking logic of the defined parameters. For details of this ranking logic, refer to the *Oracle Telephony Adapter SDK Developers Reference Guide*. You can use the following parameters in the message from the application to the Refresh utility:

IVR Parameter	Internal Name for Use with the XML Message	Rank
Account Number	AccountNum	2
Area Code	AreaCode	3
Country Code	CountryCode	3
Customer Number (Party Number)	CustomerNum	3
Customer/Contact Phone	occtANI	4
Employee Number	EmployeeNum	3

IVR Parameter	Internal Name for Use with the XML Message	Rank
Instance Number	CustomerProductID	1
Inventory Item ID	InventoryItemID	5
Phone Number	PhoneNumber	3
Product Name	ProductName	5
Serial Number	SerialNum	1
Service Request Number	ServiceRequestNum	1
Tag Number	TagNum	1

Implementing Contact Center Telephony through Oracle Telephony Applications

Implementing telephony integration using Oracle Advanced Inbound, Oracle Advanced Outbound, and the Universal Work Queue does not require any custom development and supports the warm transfer of customer data between agents.

To set up telephony in the Contact Center via Oracle telephony applications:

1. Make sure the system profile Customer Care: Telephony Screen Pop Mode is set to "UWQ".

2. Implement both Oracle Advanced Outbound and Oracle Advanced Inbound as described in *Oracle Advanced Inbound Implementation GuideOracle Advanced Outbound Implementation Guide*, *Oracle Universal Work Queue Implementation Guide*, and the *Oracle Interaction Blending Implementation Guide*.

   You must specify the window you want to display in the "Configuring a Screen Pop" procedure outlined in the *Universal Work Queue Implementation Guide*:

   - To display the Contact Center window, enter the "Customer Care Media function" in the Media Action field.

   - To pop the Service Request window, enter the "Service Request Media

function".

3. In addition, you can:

   - Improve the performance of automatic identification of customers via Automatic Number Identification (ANI)

     Set the system profile Customer Care: Use Exact Matches in ANI Searches to Yes.

     - Setting this profile to Yes improves performance by restricting the search to exact matches.

     - Setting this profile to No permits the application to use an inexact match. This may be preferable in locations where multiple telephone codes may prevent exact matches.

   - Specify the responsibilities that can access the SoftPhone icon in the toolbar

     Map the function CSCSFSPB according to the procedures described in *Oracle E-Business Suite Setup Guide.* The predefined Service responsibility includes this mapping and thus enables the icon. The SoftPhone is used by agents for both inbound and outbound calls.

   - Specify the responsibilities that can access the Initiate Call button in the Contact Center header, Contact Points tab, and the Tools menu.

     Map the function CSCSFPBU according to the procedures described in *Oracle E-Business Suite Setup Guide*.

Contact Center IVR Parameters, Call Reasons, and Window Behavior

This topic describes the IVR parameters and the call reasons customers can enter and the resulting Contact Center window behavior.

Contact Center IVR Parameters

If you have chosen to display the Contact Center window, customers can select one of the following identifiers within the IVR:

- Account Code (Customer Account Number)
- ANI
- Contact Number (Contact Party Number)
- Contract Number

- Customer Number (Customer Party Number)
- Employee ID Number
- Instance Name
- Invoice Number
- Order Number
- RMA Number
- Serial Number
- Service Request Number
- Social Security Number
- System Name
- Tag Number

Contact Center Call Reasons

Customers can select one of the following call reasons within the IVR (Please Note: In Oracle Advanced Inbound, call reasons are called "Key Value Pairs".):

- InquireSR: to inquire about a service request.
- CreateSR: to create a service request.
- InquireOrder: to inquire about an order number.
- InquireContract: to inquire about a contract number.
- InquireInvoice: to inquire about an invoice number.
- InquireIB: to inquire about an item instance.
- InquireRMA: to inquire about an RMA number.
- DisconnectService: to Disconnect Service, "Disconnect Service" is defaulted in the list of actions in Install Base tab.
- ReconfigureService: to Reconfigure Service, "Reconfigure an Instance" is defaulted in the list of actions in Install Base tab.

Contact Center: IVR and Call Reasons Matrix

The following table describes the various combinations of IVR parameters and call reasons that a customer can enter, as well as to describe the intended behavior of the application.

Note: An asterisk (*) indicates that a tab is predefined as the default, but can be changed with a profile option.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Account Code	None	Yes	Contact Center opens with customer information and default tab.
Account Code	None	No	Contact Center opens with default tab. (blank)
Account Code	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Customer Number	None	Yes	Contact Center opens with customer information and default tab.
Customer Number	None	No	Contact Center opens with default tab. (blank)
Customer Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Contact Number	None	Yes	Contact Center opens with customer information and default tab.
Contact Number	None	No	Contact Center opens with default tab. (blank)
Contact Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Service Request	None	Yes	Contact Center opens with customer information and the default Service Request tab *
Service Request (no value entered)	None	No	Contact Center opens with default tab. (blank)
Service Request (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Service Request	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Serial Number	None	Yes	Contact Center opens with customer information and the default Service Request tab *
Serial Number (no value entered)	None	No	Contact Center opens with default tab. (blank)
Serial Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Serial Number	None	Yes (multiple parties)	Customer search window opens with multiple matches.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
RMA Number	None	Yes	Contact Center opens with customer information and the default Service Request tab *
RMA Number (no value entered)	None	No	Contact Center opens with default tab. (blank)
RMA number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
RMA Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Instance Name	None	Yes	Contact Center opens with customer information and the default Service Request tab *
Instance Name (no value entered)	None	No	Contact Center opens with default tab. (blank)
Instance Name (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Instance Name	None	Yes (multiple parties)	Customer Search window opens with multiple matches.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Instance Number	None	Yes	Contact Center opens with customer information and the default Service Request tab.
Instance Number (no value entered)	None	No	Contact Center opens with default tab. (blank)
Instance Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank). Message appears stating the search returned no results.
Instance Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
System Name	None	Yes	Contact Center opens with customer information and the default Service Request tab*
System Name (no value entered)	None	No	Contact Center opens with default tab. (blank).
System Name (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
System Name	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Tag Number	None	Yes	Contact Center opens with customer information and the default Service Request tab*

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Tag Number (no value entered)	None	No	Contact Center opens with default tab. (blank)
Tag Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Tag Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Order Number	None	Yes	Contact Center opens with opens with customer information and the default Orders tab*
Order Number (no value)	None	No	Contact Center opens with default tab. (blank).
Order Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Order Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Contract Number	None	Yes	Contact Center opens with opens with customer information and the default Contracts tab*
Contract Number (no value)	None	No	Contact Center opens with default tab. (blank).

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Contract Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Contract Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Invoice Number	None	Yes	Contact Center opens with opens with customer information and the Invoice tab defaulted*
Invoice Number (no value)	None	No	Contact Center opens with default tab. (blank).
Invoice Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Invoice Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Social Security Number	None	Yes	Contact Center opens with opens with customer information and the default Dashboard tab*
Social security Number (no value)	None	No	Contact Center opens with default tab. (blank).

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Social Security Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Any	InquireSR	Yes	Contact Center Opens with the Service Request tab defaulted in inquire mode.
Any	InquireSR	No	Contact Center Opens with the Service Request tab defaulted in inquire mode.
Any	InquireSR	Yes (multiple parties)	Contact Center Opens with the Service Request tab defaulted in inquire mode.
Any	CreateSR	Yes	Contact Center Opens with the Service Request tab defaulted in create mode.
Any	CreateSR	No	Contact Center Opens with the Service Request tab defaulted in create mode.
Any	CreateSR	Yes (multiple parties)	Contact Center Opens with the default Service Request tab in create mode.
Any	InquireIB	Yes	Contact Center opens with the default Install Base tab.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Any	InquireIB	No	Contact Center opens with the default Install Base tab .
Any	InquireIB	Yes (multiple parties)	Contact Center opens with the default Install Base tab.
Any	InquireRMA	Yes	Contact Center opens with the default Service Request tab in inquire mode.
Any	InquireRMA	No	Contact Center opens with the default Service Request tab in inquire mode.
Any	InquireRMA	Yes (multiple parties)	Contact Center Opens with the default Service Request tab in inquire mode.
Any	InquireIB	Yes	Contact Center opens with the default Install Base tab.
Any	InquireIB	No	Contact Center opens with the default Install Base tab.
Any	InquireIB	Yes (multiple parties)	Contact Center opens with the default Install Base tab.
Any	InquireOrder	Yes	Contact Center opens with the default Orders tab.
Any	InquireOrder	No	Contact Center opens with the Orders tab defaulted.
Any	InquireOrder	Yes (multiple parties)	Contact Center opens with the default Orders tab.
Any	InquireInvoice	Yes	Contact Center opens with the default Invoices tab.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Any	InquireInvoice	No	Contact Center opens with the default Invoices tab.
Any	InquireInvoice	Yes (multiple parties)	Contact Center opens with the default Invoices tab.
Any	InquireContract	Yes	Contact Center opens with the default Contract tab.
Any	InquireContract	No	Contact Center opens with the default Contract tab.
Any	InquireContract	Yes (multiple parties)	Contact Center opens with the default Contract tab.

Service Request IVR Parameters, Call Reasons, and Window Behavior

This topic describes the IVR parameters, call reasons, and behavior for the Service Request window.

Service Request IVR Parameters

If you are displaying the Service Request Windows, customers can select one of the following identifiers within the IVR:

- Service Request Number
- Account Code (Customer Account Number)
- Serial Number
- Tag Number
- Customer Number (Customer Party Number)
- RMA Number
- Contract Number

Service Request Call Reasons

Customers can select one of the following call reasons within the IVR. (Note: In Oracle Advanced Inbound, call reasons are called "Key Value Pairs".):

- InquireSR: to inquire about a service request.
- CreateSR: to create a service request.

Service Request: IVR and Call Reasons Matrix

The following tables describes the various combinations of IVR parameters and call reasons that a customer can enter, as well as to describe the intended behavior of the application.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Account Code	InquireSR	Yes	Find Service Request Lists all open service requests.
Account Code	InquireSR	No	Find Service Request
Account Code	CreateSR	Yes	Create Service Request Defaults party details.
Account Code	CreateSR	No	Create Service Request (blank mode)
Customer Number	InquireSR	Yes	Find Service Request Lists all open service requests.
Customer Number	InquireSR	No	Find Service Request
Customer Number	CreateSR	Yes	Create Service Request Party details are displayed by default.

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Customer Number	CreateSR	No	Create Service Request (blank mode)
Serial Number	InquireSR	Yes	Find Service Request Lists all open service requests.
Serial Number	InquireSR	No	Find Service Request
Serial Number	CreateSR	Yes	Create Service Request form Instance details are displayed by default.
Serial Number	CreateSR	No	Create Service Request (blank mode)
Tag Number	InquireSR	Yes	Find Service Request Lists all open service requests.
Tag Number	InquireSR	No	Find Service Request
Tag Number	CreateSR	Yes	Create Service Request form Defaults instance details.
Tag Number	CreateSR	No	Create Service Request (blank mode)
RMA Number	InquireSR	Yes	Service Request Opens main service request.
RMA Number	InquireSR	No	Find Service Request

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Contract Number	CreateSR	Yes	Find Service Request Lists all open service requests.
Contract Number	CreateSR	No	Find Service Request
Contract Number	InquireSR	Yes	Create Service Request Party details are displayed by default.
Contract Number	CreateSR	Yes	Create Service Request (blank mode)
Service Request Number	InquireSR	Yes	Service Request Opens main service request.
Service Request Number	InquireSR	No	Find Service Request

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Setting Up Custom Tabs in the Contact Center

This chapter covers the following topics:

- About Setting Up Custom Tabs in the Contact Center
- Guidelines for Setting Up Custom Tabs in the Contact Center
- Parameters Passed from the Contact Center Header
- Function Names for Custom Tabs

About Setting Up Custom Tabs in the Contact Center

You can create two custom tabs in the Contact Center window by modifying the code for the Contact Center form and the associated library.

The customization must be made on a view or a table which has a reference or intersection with HZ_PARTIES. The fields that can be displayed in the custom tabs are based on this view or table.

The implementer must write public APIs to perform transactions against this table. Code for insert, update and delete must be built into these APIs after the necessary validations.

The form you create can be compiled and run standalone. There are no dependencies for running this form.

This topic covers:

- Guidelines for Setting Up Custom Tabs, page 30-2
- Parameters Passed from the Contact Center Header, page 30-4
- Function Names for Custom Tabs, page 39-4

Guidelines for Setting Up Custom Tabs in the Contact Center

These steps provide guidelines to help you with custom tab implementation.

Prerequisites:

Knowledge of Oracle Forms development procedures and an understanding of Oracle TeleService code.

To set up the two custom tabs:

1. Customize the form using the following guidelines:
   - In the form `CSCCUST1.fmb` and/or `CSCCUST2.fmb`, create a data block with all the fields you wish to display in the custom tab.
   - Code an On Insert trigger for the data block to insert data into the tables.
   - Code an On Update trigger for the data block to update data in the tables.
   - Code an On Delete trigger for the data block to delete data from the tables.
   - The fields in the data block must be placed on the tabbed canvas `CC_MAIN_TAB_CANVAS.CUSTOM1` and/or `CC_MAIN_TAB_CANVAS.CUSTOM2`.
   - Any record groups and LOVs must be coded.
   - To integrate this with the Contact Center, The data block, record groups, and LOVs for `CSCCUST1.fmb` must be dropped in the `CUSTOM1_OBJ_GRP` object group. Those for `CSCCUST2.fmb` must be dropped in the `CUSTOM1_OBJ_GRP2` object group.
2. Modify the library using the following guidelines:
   - You can use any of the following event handlers:

Trigger Name	Description
WHEN-NEW-FORM-INSTANCE	This trigger calls WHEN-NEW-FORM-INSTANCE of the custom form. Code is added to the custom library based on the requirements of the custom form.

Trigger Name	Description
KEY-CLRFRM	This trigger calls CLEAR_CTRL_FIELDS which clears the control field values populated by values from the header region.
WHEN-NEW-FORM-INSTANCE RESTART WHEN-TAB-PAGE-CHANGED	These triggers call the POPULATE_CTRL_FIELDS procedure which populates the control fields from the header region.

- All the code to handle API calls can be put in the library `CSCCUST1.pld` and/or `CSCCUST2.pld`.

3. Integrate the forms with the Contact Center:
   1. Copy the forms `CSCCUST1.fmb` and/or `CSCCUST2.fmb` to the $AU_TOP/forms/US directory in the patched environment.
   2. Compile the corresponding library and copy `CSCCUST1.pll` and/or `CSCCUST2.pll` to the `$AU_TOP/`resource directory in the patched environment.
   3. Run the adadmin utility to compile CSC forms and libraries so that the changes made to the custom form and library are displayed in the Contact Center.

Parameters Passed from the Contact Center Header

The following parameters are passed from the Contact Center form to the CSCCUST1 and CSCCUST2 forms:

Parameter	Description
Customer_Header_blk.Cust_Party_Type	Customer's party type
customer_header_blk.cust_account_number	Customer's account number
customer_header_blk.cust_cust_acct_id	Customer's account identification number

Parameter	Description
contact_header_blk.cont_per_party_id	Identification number for the Contact's party of Person
contact_header_blk.cont_relationship_id	The identification number for the party relationship
contact_header_blk.cont_party_type	Contact's party type

Function Names for Custom Tabs

The function name for `CSCCUST1` is `CSCSFCU1`. For `CSCCUST2`, it is `CSCSFCU2` . These functions are added to the `CSC_CONTACT_CENTER_MENU`. You can use it to hide and show the custom tabs.

By default, the tabs are hidden so you must enable the function in the menu `CSC_CONTACT_CENTER_MENU`.

> **Note:** Please back up your custom forms and libraries before applying any future CSC patches for these files so as to not overwrite them in $AU_TOP/forms/US and $AU_TOP/. After the patch is applied successfully, you must copy the customized files back to these directories and run adadmin to generate CSC forms and libraries.

40

Capturing Additional Service Request Attributes

This chapter covers the following topics:

- Overview of Capturing Additional Service Request Attributes in the Contact Center and Service Request Windows
- About Additional Attributes
- Process Overview of Attribute Setup
- Creating Prompts and Questions
- Creating the Lists of Values for the Answers
- Setting Up Attributes for a Service Request Type
- Implementing the Validate Address User Hook
- Enabling Attribute Capture in Oracle iSupport
- Using Request Types and Additional Attributes to Generate Tasks or Launch Workflows

Overview of Capturing Additional Service Request Attributes in the Contact Center and Service Request Windows

This section explains how to set up the capture of additional service request information (attributes) in a structured question and answer format at the time a service request is created in the Contact Center and by customers on their Oracle iSupport Web portal.

> **Note:** You must use a different method of capturing additional service request information if you are using Customer Support, Case Management, or Service Desk. See Capturing Additional Service Request Information with Extensible Attributes, page 45-1.

For a general explanation of attributes see About Additional Attributes, page 40-2.

For an overview of the setup steps see Process Overview of Attribute Setup, page 40-3
.

The remaining topics explain individual setup steps:

- Creating Prompts and Questions, page 40-4
- Creating Lists of Value for the Answers, page 40-4
- Setting Up Attributes for a Service Request Type, page 40-5
- Enabling Attribute Capture in Oracle iSupport, page 40-8

About Additional Attributes

You can require agents or customers creating a service request to enter additional information in response to a set of prompts or questions. Obtaining additional information in this structured format is important for reporting problems that do not involve inventory or install base items and permits the application to take action based on the information provided.

For example, a government agency receiving a call about an abandoned vehicle must capture the make, model, color, and the license plate number so the towing service knows which vehicle to tow away and what tow truck to send to do the job.

Based on the information entered, the application can:

- Automatically create different tasks

  For example, you can set up the application to create a task to send a different type of tow truck depending on whether the abandoned vehicle is a passenger car or a bus.

- Automatically check if the new service request is a duplicate

  You can have the application automatically check past service requests for potential duplicates. Has anyone else called about an abandoned car with the same make, model, and color within the last ten days?

You can capture the additional attributes for service requests created by agents from the following locations:

- Service Request tab of the Contact Center
- Customers in Oracle iSupport
- Workbench tab of a Service Request window
- Header region of a Service Request window

Note: This method of capturing additional attributes is not available for service requests created using Customer Support, Case Management, Service Desk, Oracle Depot Repair, and Oracle Email Center applications.

Note: Some elements of the user interface in the setup windows refer to the Oracle Citizen Interaction Center or "CIC" rather than to Oracle TeleService. This is because the additional attribute functionality was developed by the Oracle Citizen Interaction Center which is an integral part of Oracle TeleService. Not all of the terminology has been changed in setup windows.

Process Overview of Attribute Setup

This overview summarizes setups for the capture of additional attributes. Follow the references in each step for detailed procedures.

To set up the capture of additional service request attributes:

1. Set up the prompts or questions agents see and lists of values they use to select the answers:
    1. Enter the prompts or questions in the CUG_SR_TYPE_ATTRIBUTES lookup. For example: "Is the vehicle blocking traffic?" or "License Plate Number." See Creating Prompts and Questions, page 40-4.
    2. Agents can either enter an attribute by typing it in or by making a selection from a list of values.

       To have agents make their entries using the list of values, create a new lookup for each list of answers. See Creating Lists of Values for the Answers, page 40-4.

       A list of values ensures consistency of entries and improves duplicate checking. Although the application can check for duplicates based on free-text answers, the matches must be exact, including capitalization and spacing.
2. Navigate to Setup, then Mapping, and select Extended Attribute Mapping and specify which questions and answers you wish to use for each service request type. See Setting Up Attributes for a Service Request Type, page 40-5.
3. To have customers fill in the same information when they create service requests using Oracle iSupport, follow the steps described in Enabling Attribute Capture in Oracle iSupport, page 40-8.

4. The application stores entries in the attribute fields as service request notes. You can choose to automatically display these notes for customers on their Oracle iSupport portal by setting the system profile Service: Default Note Status For Extended Attributes to Publish. By default, this system profile is set to Public. This means that the notes are visible only to other agents. The setting of this profile overrides the setting of system profile Notes: Default Notes Status for those notes created from service request attributes.

Creating Prompts and Questions

Use this procedure to create the prompts or questions agents must answer for attribute capture.

To create the questions or prompts for capturing attributes:

1. Under the Application Developer Responsibility, navigate to Lookups, and select Application Object Library.

   The Application Object Library Lookups window appears.

2. In the Type field, use the Query Enter and Query Run method to display the lookup `CUG_SR_TYPE_ATTRIBUTES`.

3. Set up each question or prompt on a separate row (you can create additional rows by clicking **New** in the toolbar):

   1. In the Code field, enter a unique code. This code is for internal use only and does not get displayed to agents or users.

   2. Enter the text of the question or prompt in both the Meaning field and Description field.

      The text you enter in the Description field is what agents see.

      The Meaning field is displayed in the list of values you use to link the answers to the questions. For this reason you may wish to make the entries identical.

4. Click **Save** in the toolbar.

Creating the Lists of Values for the Answers

Use this procedure to create lookups with the lists of answers for questions you have defined.

To define the list of answers:

1. Under the Application Developer Responsibility, navigate to Lookups, and select

Application Object Library.

The Application Object Library Lookups window appears.

2. In the Type field, enter a name for the list of answers. This is the name that appears in the list of values when you link the list to the prompt or question.

3. In the User Name field, enter a user friendly name for the value list.

4. Use the Application field LOV to select **Oracle Citizen Interaction Center**.

5. Optionally enter a description for this group of answers.

6. Set up the list of values in the table below the control region. You can create additional rows by clicking **New** in the toolbar as needed. For each value:

    1. In the Code field, enter a unique code. This code is for internal use only and does not get displayed to agents or users.

    2. Enter the text in the Meaning and in the Description fields.

        The text you enter in the Description field is what agents see in the list of values.

7. Click **Save** in the toolbar.

Setting Up Attributes for a Service Request Type

Use this procedure to specify the attributes to be captured for a service request type.

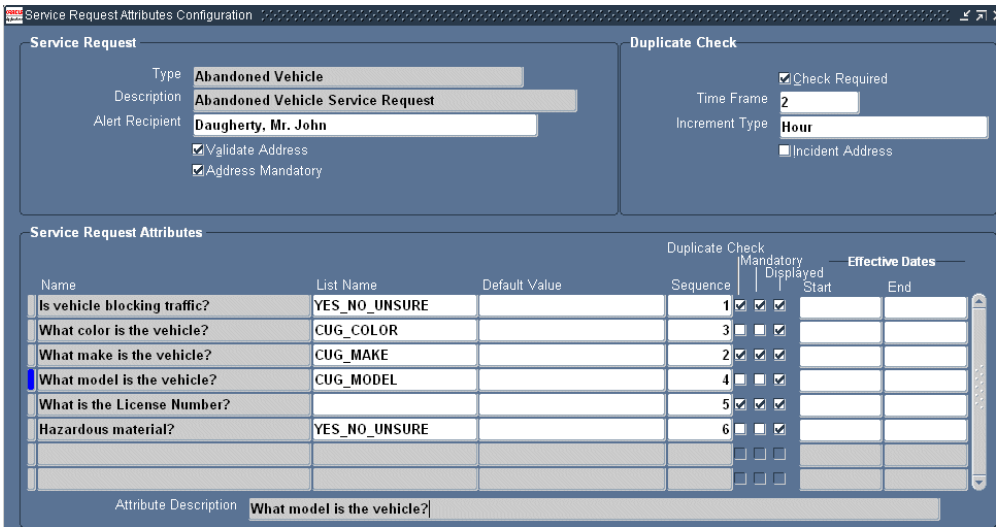
Prerequisites:

Service request types must be defined and you must have completed the setup of both the prompts and of the lists of values agents use to make their entries.

To specify which attributes to capture for a service request type:

1. Navigate to Setup, then Mapping, and select Extended Attribute Mapping.

    The Service Request Attributes Configuration window appears.



2. Use the Type LOV to select the service request type you want to set up. The description of the service request type appears in the Description field.

3. Enter an Alert Recipient. The application notifies this recipient when a potential duplicate service request is created on Oracle iSupport Web portal.

4. To validate the address by a user hook you have created, select the Validate Address check box. The user hook can be read by a third party application that may have specific address format requirements. See Implementing the Validate Address User Hook, page 40-7.

5. Select the Address Mandatory check box to make it mandatory for agents to enter the incident address.

6. In the Service Request Attributes region, set up each attribute:

    1. In the name field, select the prompt or question you defined in the `CUG_SR_TYPE_ATTRIBUTES` lookup type.

        Note: The agents see the text displayed in the Attribute Description, not the name.

    2. If agents must use the list of values for their entries, then use the List Name LOV to select the lookup where you defined the valid values.

        If you do not select a lookup here, agents are permitted to make entries as free text.

    3. If you have not selected a lookup in the previous step, then, optionally, enter a default value for this field. The default value is displayed automatically in the

attribute capture window and is saved if agents do not modify it.

4. Enter an integer in the Sequence field corresponding to the order you wish to present the prompt. The prompts are displayed in descending order.

   Entry in this field is optional. If you do not enter a sequence, the application displays the prompts in alphabetical order.

   If you specify an order, then the application displays those prompts with sequence first followed by any without a sequence in alphabetical order.

5. To make entry optional, deselect the Mandatory check box. This check box is selected by default requiring agents to enter a value before saving the service request.

6. The Displayed check box must be selected to display the attribute to agents. This check box is selected by default.

7. Save your work.

8. To set up duplicate checking based on the attributes you have defined, follow the instruction described in Setting Up Automatic Duplicate Checking for Service Requests, page 9-1.

9. To have customers fill in the same attribute information when they create service requests using Oracle iSupport, follow the steps described in Enabling Attribute Capture in Oracle iSupport, page 40-8.

Implementing the Validate Address User Hook

You must use a Global Information System application such as Oracle Spatial, for the storage, retrieval, and manipulation of spatial data. Oracle TeleService provides the user hook for the address validation against this data.

This topic provides guidelines for implementing the validate address user hook.

To implement the validate user address hook for Runtime Form:

Upon commit, CUG_VALIDATE_ADDRESS_TYPE.Validate_Incident_Address_Type (CUGVADTS.pls and CUGVADTB.pls) is called to validate address and jurisdiction; which then calls CUG_Validate_Address_Pkg.Validate_Incident_Address (CUGVADIS.pls) for address validation, and CUG_Validate_Type_Pkg.Validate_Incident_Type (CUGVTPIS.pls) for jurisdiction validation.

You can customize or create the package body to implement address and jurisdiction validation logic in CUG_Validate_Address_Pkg.Validate_Incident_Address and CUG_Validate_Type_Pkg.Validate_Incident_Type package.

Note: The previously mentioned pls files can be found at $CUG_TOP/patch/115/sql.

To implement the validate user address hook for Oracle iSupport:

Citizen Interaction Center (CIC) has CugValidateAddressIF.java, CugValidateTypeIF.java, interface located under oracle.apps.cug.cm. This interface is the container of abstract methods that might be required to conduct address validation and jurisdiction check on a given incident address and incident type.

You must set the following profiles to determine the customer implementation class for performing jurisdiction and address validation:

- CUG_ADDRESS_VALIDATION_CLASS: Class Name for Validating the Address
- CUG_TYPE_VALIDATION_CLASS: Class Name for Jurisdiction Check

  Note: CugValidateTypeAndAddress is a public Java class which instantiates the interface implementation classes entered in the CUG_ADDRESS_VALIDATION_CLASS and CUG_TYPE_VALIDATION_CLASS profiles.

The architecture (PL/SQL and Java) is executed only if the Validate Address flag is selected for the service request type in the Service Request Attribute Configuration window of the CIC setup.

Enabling Attribute Capture in Oracle iSupport

Use this procedure to make service request attribute capture available for use in Oracle iSupport. The procedure involves running two concurrent programs to map the attribute setup to iSupport templates. By doing so, customers entering service requests are asked to submit the same information as agents in Oracle TeleService.

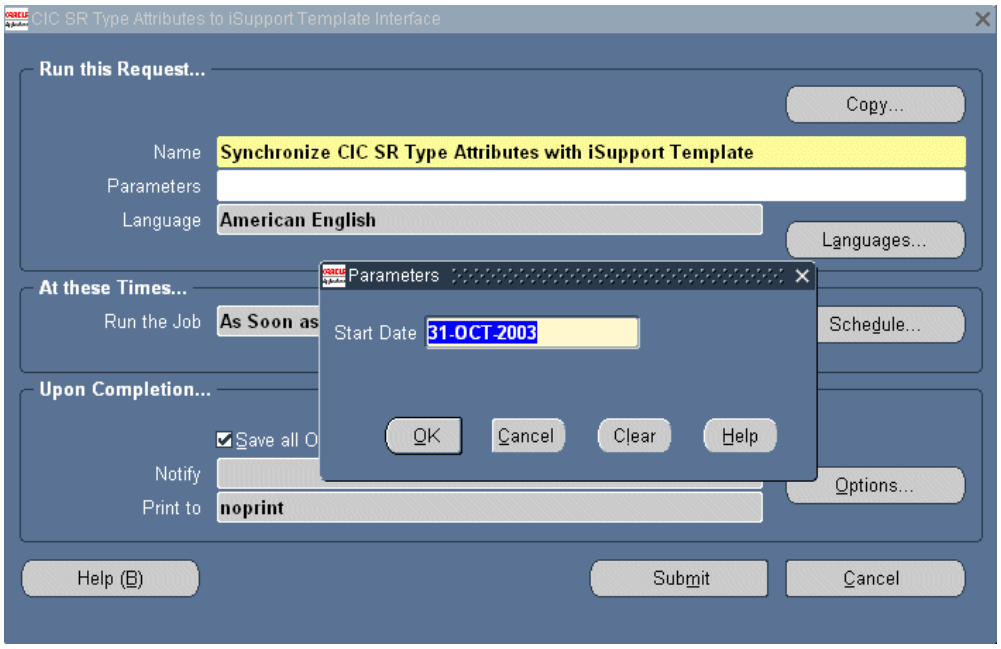
Prerequisites:

- Be familiar with running concurrent programs.
- Set up attribute capture for service request types first.

To enable attribute capture in Oracle iSupport:

1. Navigate to Setup, Synchronize TeleService with iSupport, Sync SR Type to iSupport Template.

   The Parameters and the CIC SR Type Attributes to iSupport Template Interface windows appear.



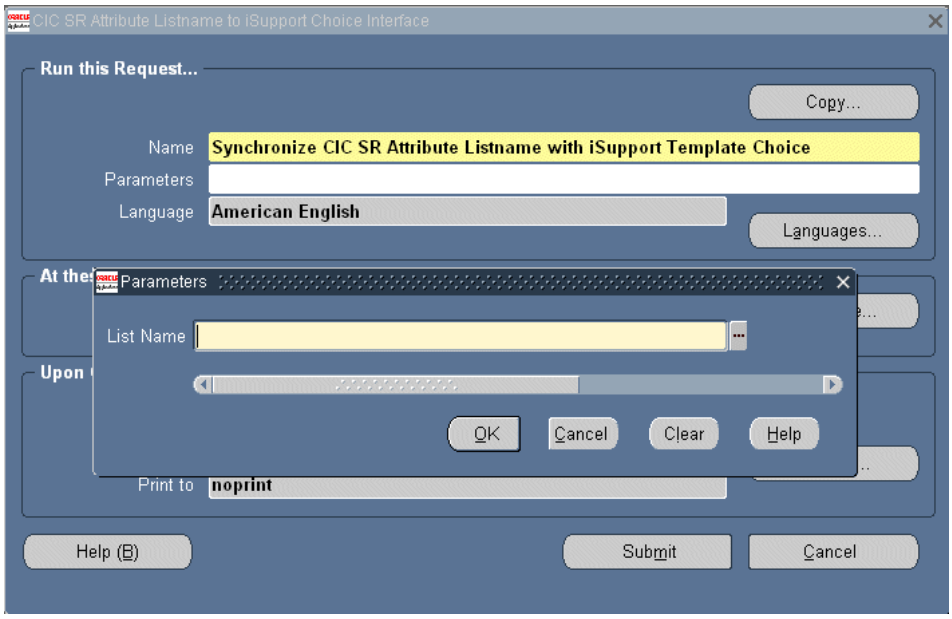
2. Enter the start date. All attribute setups created on or since this date are mapped to Oracle iSupport templates.

3. Click **Submit** and follow the standard procedures for running concurrent programs.

4. You must run a separate concurrent program to map each of the lookups (lists of values) that are used by your attribute setups. For each lookup:

    1. Navigate to Sync SR Attribute Listname to iSupport.

        The Parameters and the CIC SR Attribute Listname to iSupport Choice Interface windows appear.



2. Enter the name of the lookup in the List Name field.

3. Click **OK**.

4. Submit the concurrent program following the standard procedure for running concurrent programs.

Using Request Types and Additional Attributes to Generate Tasks or Launch Workflows

If you have set up your service request types to capture additional information, you can generate tasks based on a combination of the service request type and the information agents or customers enter.

For example, a government agency sets up the Abandoned Vehicle service request type to capture additional information required to deal with the problem.

Whenever agents create a service request of type "Abandoned Vehicle", a list of questions appear: What is the make of the vehicle?, the model?, The color?, The license plate number?, Does it carry hazardous materials?

You can automatically create a task based on the values an agent enters in any attribute. For example, if the agent specifies that the vehicle is a bus, the application creates a task to send a large tow truck. If the vehicle is a passenger car, the task may be for a small tow truck. If the vehicle carries hazardous materials, the application creates an additional task to alert the hazardous materials team.

Optionally, you can set up the task to launch an Oracle Workflow process and pass to it

parameters you specify.

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Generating Tasks on Additional Service Request Attributes

This chapter covers the following topics:

- Overview of Task Generation on Additional Contact Center Attributes
- Generating Tasks on Request Type and Attribute Values
- Modifying and Extending Task Generation
- Overview of Modifying Task Generation
- Extending Task Generation with a Workflow Process
- Defining Task Types
- Defining Task Status
- Defining Task Priority
- Defining Additional Attributes for Tasks
- Mapping Additional Attributes to a Task Type
- Sample Generic E-mail Notification Workflow
- Enabling the Sample E-mail Workflow Process

Overview of Task Generation on Additional Contact Center Attributes

This chapter describes how you can automatically generate tasks based on the capture of the additional service request attributes you have set up for the Contact Center. (The setup of these attributes is described in Capturing Additional Service Request Attributes, page 40-1.)

> **Note:** If you are not implementing the Contact Center attributes or using the other Oracle TeleService modules, you can instead generate tasks based on a combination of the service request type, the item or

item category, and the problem code. See Generating Tasks Automatically, page 25-1.

For example, that a government agency in charge of disposing of abandoned cars on city streets needs to ensure it sends the right kind of tow truck for the job. Whenever agents create a service request of type Abandoned Vehicle in the Contact Center, the application presents them with a list of questions: What is the make of the vehicle? The model? The color? The license plate number? Does the vehicle carry hazardous materials?

Based on the information the agents enter, you can set up the application to automatically create the appropriate tasks. For example, if an agent specifies that the vehicle is a bus, the application creates a task to send a large tow truck. If the vehicle is a passenger car, the application generates a task for a small tow truck. If the vehicle carries hazardous materials, the application creates an additional task to alert the hazardous materials team.

Optionally, you can set up the task to launch an Oracle Workflow process and pass to it parameters you specify.

If you choose to use this method of generating tasks, you cannot generate tasks based on service request type, item, and problem code. The two methods are mutually exclusive. You must choose between them at the site, application, or responsibility level, by setting the profile Service: Auto Generate Tasks. The available settings are:

- None (the default setting)

  Disables the automatic creation of tasks based on the attributes.

- Task Type Attribute Configuration

  Enables automatic creation of tasks based on the information entered in the attributes. If a task is created from task attributes, the Assignment Manager automatically assigns the task owner if a value is not specified for the owner. But, if the Assignment Manager is unable to assign the task to an owner, the Auto Assignment program uses the values specified in the Service: Default Service Request Task Owner Type and Service: Default Service Request Task Owner profile options.

- Task Template Mapping

  Enables automatic creation of tasks based on mapping of service request types to problem codes, items, and item categories.

Generating Tasks on Request Type and Attribute Values

Using this procedure to set up the generation process.

Prerequisites:

You must set up the attributes first. See Capturing Additional Service Request Attributes, page 40-1.

To generate tasks based on extended attribute values:

1. Set the system profile Service: Auto Generate Tasks to Task Type Attribute Configuration:
    1. Navigate to Others, and select Profile System Values.

       The Find System Profile Values window appears.

    2. Make sure Site and Profiles with no values check boxes are selected.

    3. Enter `%Auto Generate%` as the search term in the Profile field.

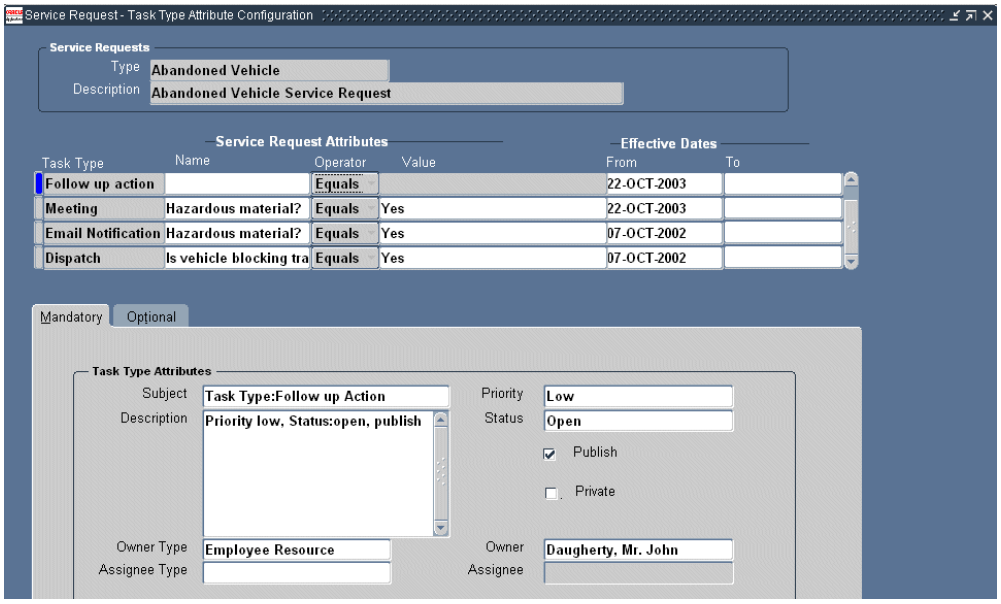
       The System Profiles window displays the profile option.

    4. Make your selection and save.

2. Navigate to Setup: Mapping, and select Task Type Attribute Mapping.

3. Select the service request type you want to map in the Service Request Types search window.

   The Service Request Task Type Configuration window appears.



4. Set up the rules for creating tasks based on attribute values in the Service Request Attributes region. For each rule:
    1. If required, create a new entry line by clicking **New**.

2. Use the Task Type LOV to select the task type for the task to be generated.

3. Using the Name LOV, select the attribute.

4. Select the = operator. This is the only operator supported.

5. In the Value field enter the value to trigger the task generation. If you have set up the attribute with a list of values, then you must select the value. If you have not, then you must enter the value as text.

6. On the Mandatory tab, enter the details of the task, such a description, its default status, priority, publish flag, private flag. The application uses the information for creating tasks.

   Note: You must enter a task owner, the individual responsible for the completion of the task. This means that you cannot automatically assign tasks created in this way via automatic assignment.

   Select the Publish flag to have the task display in Oracle iSupport where it can be viewed by customers.

5. To trigger a workflow when the task is created, you must associate the workflow with the task type in the Task Types window. (See Defining Task Types, page 41-5).

6. If you have set up a workflow for this task and wish to pass it additional task attributes, then select the Optional tab and select the values for the attributes there. See Modifying and Extending Task Generation, page 41-5.

Modifying and Extending Task Generation

This section describes how you can extend the task generation process, for example, to launch an Oracle Workflow process. Much of the setup is done in Task Manager, a separate application foundation module. For further details on task setups, see the Task Manager section of the *Oracle Common Application Calendar Implementation Guide*.

Overview of Modifying Task Generation

There are multiple ways you can modify the automatic task generation process. Some modifications involve the standard task setups performed in the Task Manager. For example, you can create additional task types, statuses, and priorities.

You can also set up a task to automatically launch an Oracle Workflow process, for example, to notify assignees by e-mail that tasks have been created. Oracle supplies a

sample process with your application. (See Sample E-mail Notification Workflow Customization, page 41-12.)

To launch a Workflow process, you associate it with a task type. (This is done in the same Task Type window where you set up task types. See Defining Task Types, page 41-5.)

For example, a government department handling hazardous material spills needs to notify different individuals via e-mail depending on the type of the material involved in a spill.

To do this, the department creates an Oracle Workflow process, which automatically sends an e-mail notification and maps it to the task type. The department sets up additional task attributes to pass the text of the e-mail, the e-mail address of the individual to be notified, and other information.

This way the workflow can send different e-mails to different individuals depending on whether the spill involves acid or radioactive material.

Extending Task Generation with a Workflow Process

This topic outlines how you can extend task generation to launch a workflow.

To extend task generation to launch an Oracle Workflow process:

1. Create an Oracle Workflow process with the attributes you wish to capture and upload it into the Service Request item type.

2. Create a task type and associate it with the workflow. For details, see Defining Task Types, page 41-5.

3. Create additional attributes you want to pass to the Workflow process according to the procedure described in Defining Additional Attributes for Tasks, page 41-10.

4. Map the attributes to the Task Type and enter the values to be passed into the task attributes. See Mapping Additional Attributes to a Task Type, page 41-10.

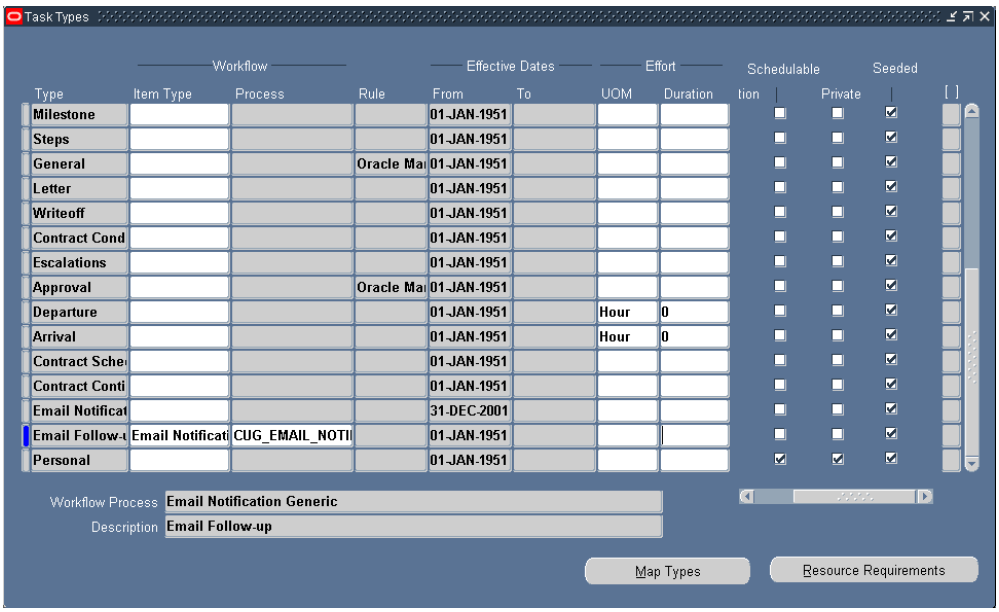
Defining Task Types

Use this procedure to set up and modify task types. While the primary function of task types is to classify tasks, you can use task types to specify the types of resources that can be assigned, determine whether the tasks can be scheduled for Oracle Field Service, and to automatically launch workflows when tasks of this type are created. For further information see the tasks section of the *Oracle Common Application Calendar Implementation Guide*.

To define task types:

1. Navigate to Setup, then Task Management, and select Task Types.

   The Task Types window appears.



2. If you are creating a new task type, click **New** in the toolbar to insert a new row for entering task type.

3. In the Type field, enter a name for the task type. This is the name of the task type agents see in the list of values.

4. To launch a workflow each time for this task type:

   1. For Item Type, select Worklfow type.

   2. Use the Process LOV to select the name. The Task Workflow and Description fields towards the bottom of the window display information about the workflow.

5. If you are planning to use this type for Oracle Field Service, then select Field Service using the Rule field LOV.

6. Make entries in the Effective Dates From and Effective Dates To fields to limit the availability of this type.

7. To specify the amount of time this task should take:

   1. In the UOM field, select the unit of measure for quantifying the effort for the

task type.

2. In the Duration field, enter the default amount of time this task type would take to complete.

8. Select the Notification check box to notify the task owner that a task has been created through the Oracle Workflow notifications page.

9. Select the Schedulable check box to have the task scheduled through Oracle Advanced Scheduler.

   Note: The Private check box is reserved for future use.

10. The Seeded check box indicates predefined task types.

11. To specify the type of resources that can be assigned to complete the task:

    1. Click **Resource Requirements.**

       The Resource Requirements window appears.

    2. Using the Name LOV, select the resource type to be used with this task type.

    3. In the Required Units field, enter the estimated number of units of the selected resource type that would be required to perform this task type.

    4. Select the Enabled Flag check box to activate the resource type assignment for the task type.

    5. Select OK to save your assignments and return to the Task Types window.

12. Save your work.

Defining Task Status

You can limit the user's choices of task status by defining the list of status options and determining the employee type that has access to each status type. When you provide a list of values for the Task Status field, task creators choose from a predefined template of status options. Use this procedure to define types of task status.

You can also define a group of tasks that must be performed and impose a sequence of statuses to the tasks. A status transition is the imposed sequence of statuses. For example, one status transition may dictate the following status sequence:

- Open

- Assigned
- Working
- Closed

As each status in the sequence is completed, the subsequent status appears on the agent's list.

In addition, you can define rules for each status transition. A status transition rule defines access and read-write privileges for the status transition. Rules can be associated to responsibilities, so that a manager may have more privileges than an agent.

To define task status:

1. Navigate to the Task and Escalation Status window.
2. Define a type name and enter it in the Status field.
3. Enter a brief description of the status type in the Description field.
4. Enter the effective dates in the From and To fields.
5. Select the appropriate task status check boxes. The following check boxes are available:
    - Task Status
    - Assignment Status
    - Assigned
    - Working
    - Schedulable
    - Accepted
    - Rejected
    - Onhold
    - Approved
    - Completed
    - Cancelled
    - Delete Allowed

- Closed
- Seeded

6. Optionally, define transition values that determine the user privilege for each status type.

   Use this procedure to define transition values.

   1. Click Define Transition.

      The Status Transition window opens.

   2. In the Rules tab, enter a name for the user privilege relationship in the Rule Name field.

   3. Enter an initial and final status type for the user.

      Use the initial and final status values to determine the user's range for selecting task status.

   4. In the Responsibility tab, enter a rule name.

   5. Enter a user type in Responsibility Name field and click OK.

      A transition value stipulating user status privilege now exists.

   6. Save your task status type.

      The new task status and corresponding privileges register as lists of values for their fields in the application.

Defining Task Priority

Determine task priority by choosing terms for varying levels of priority and setting an importance rating that corresponds with each term.

To define task priority:

1. In the Tasks window, click Navigator on the Task toolbar.
2. In the Task Manager Navigator, double-click Setup to expand the node.
3. Select Task Priority and click **OK**.

   The Task Priority window opens.

4. Define a name and enter it in the Priority field.

5. Enter a numerical value in the Importance field.

   Choose an importance value from a larger defined scale of priority.

6. Enter a brief description of the priority value.

7. Enter the effective dates in the From and To fields.

8. Select Seeded to restrict the edit of task priority from future users.

9. Save your task type.

   The new task priority registers as a lists of value for the Priority field in the application.

Defining Additional Attributes for Tasks

You can define additional attributes in the lookup CUG_TASK_TYPE_ATTRIBUTES.

To define additional task type attributes:

1. Under the Application Developer Responsibility, navigate to Lookups, and select Application Object Library.

   The Application Object Library Lookups window appears.

2. In the Type field, use the Query Enter / Query Run method to display the lookup CUG_TASK_TYPE_ATTRIBUTES.

3. Set up each question or prompt on a separate row (you can create additional rows by clicking **New** in the toolbar):

   1. In the Code field, enter a unique code. This code is for internal use only and does not get displayed to agents or users.

   2. Enter the attribute name in both the Meaning field and Description field.

4. Click **Save** in the toolbar.

Mapping Additional Attributes to a Task Type

Use this procedure to map additional task attributes to a task type. Doing so makes it possible for you to pass values of these attributes to an Oracle Workflow process you have created.

Prerequisites:

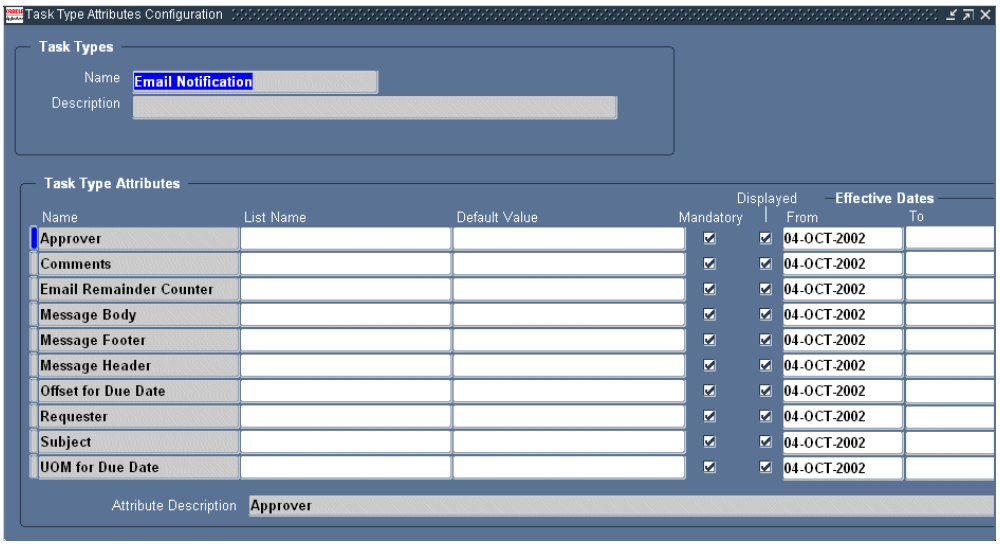
- Create the task types

- Create the attributes in the CUG_TASK_TYPE_ATTRIBUTES lookup.
- To use a list of values to pass values to an attribute, you must create the lookups with the values first.

To map additional attributes to a task type:

1. Navigate to Setup, then Task Management, and select Task Type Attributes.

   The Task Type Attribute Configuration window appears.



2. Use the Name LOV to select the task type you want to set up.
3. In the Task Type Attributes region, enter the attributes you wish to map:
   1. Using the Name LOV, select the attribute from those you have defined in the CUG_TASK_TYPE_ATTRIBUTES lookup.
   2. If you are using a list of values to select values for the attributes, then use the List Name LOV to select the lookup where you defined the valid values.

      If you do not select a lookup here, you can enter text instead.
   3. If you have not selected a lookup in the previous step, then, optionally, enter a default value for this field.
   4. Enter an integer in the Sequence field corresponding to the order you wish to present the prompt. The prompts are displayed in descending order.
   5. To make entry optional, deselect the Mandatory check box. This check box is selected by default.

6. The Displayed check box must be selected to display the attribute. This check box is selected by default.

4. Save your work.

Sample Generic E-mail Notification Workflow

To illustrate how you can extend automatic task generation, Oracle includes a sample process that sends an e-mail when a task of type Email Notification is created with content you specify in the additional attributes.

The sample extension includes:

- The "Email Follow-up" task type, page 41-12: This task type has been set up with additional task attributes
- The "Email Generic Notification Process", page 41-13: This Oracle Workflow process sends an e-mail via the workflow mailer.

To use this sample e-mail extension, follow the steps described in Enabling the Sample E-Mail Workflow Process, page 41-14.

E-Mail Follow-up Task Type

The following table lists the sample Email Follow-up task type attributes which pass information to the Email Generic Notification workflow process. The second column of the table explains what entries you can make for each attribute.

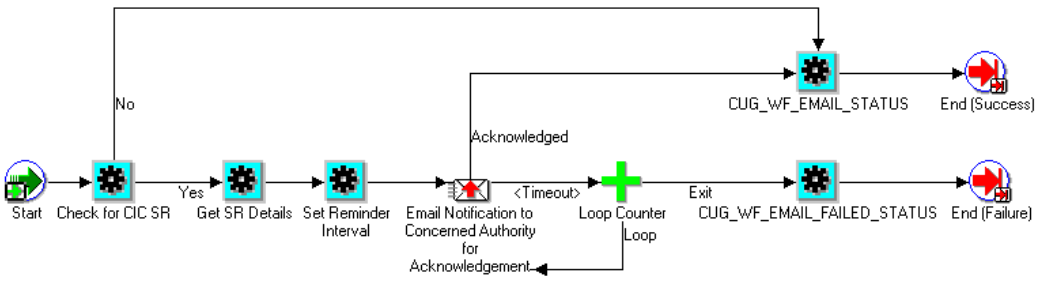
Attribute	What You Enter
Approver	A user name with an e-mail address. The approver is the message recipient.
Subject	Text that appears as the subject of the e-mail message.
Message Body	Text of the message.
Requester	A user name with an e-mail address. The requester is the person who is listed as the sender
Message Header	Text, which appears as the header of the message.

Attribute	What You Enter
Message Footer	Text, which appears as the footer of the message.
Email Reminder Counter	The number of reminders you want to send to the requester.
UOM for Due Date	Unit of measure for the due date: DAY, WEEK, MONTH
Offset for Due Date	The number of days, weeks, or months.

Note: For the Approver and Requester task type attribute you must enter an Oracle Application user name. This is defined in the Users window under the System Administrator Responsibility. The Email Notification workflow uses the e-mail address entered for the user in the same window.

E-mail Notification Generic Process

The following diagram illustrates the sample workflow process Oracle Workflow Process Email Notification Generic (CUG_EMAIL_NOTIFICATION)



1. The process initiates when a task of type Email Follow-up is created.

   Note: You must make sure that the workflow is mapped to the task type in the Task Type window.

2. The process gets the task attribute details (requester, approver, subject, etc.) from the values you enter on the Optional tab of the Task Type: Attribute Configuration window.

3. The process sets a due date for the approver to acknowledge the e-mail notification. The due date is set based on the service request creation date and the number of days you enter in the Offset for Due Date attribute.

4. The process sends an e-mail to the Approver with the text you entered in the Subject, Message Header, Message Body, and Message Footer attribute.

5. If the approver does not acknowledge the message by the end of the due date, the process sends a reminder notification. The process sends the number of reminders you specify in the Email Remainder Counter attribute. If the approver acknowledges any of the notifications (the original or a reminder), the workflow terminates.

6. If the approver does not respond, the workflow sends the maximum number of reminders. The work flow then fails and terminates.

7. When the process completes successfully, the workflow updates the task status to Completed. If the processing fails, the process sets the task status to Cancelled. You can modify these statuses by setting the following system profiles:

   - CUG_TASK_FAILED_STATUS
   - CUG_TASK_SUCCESS_STATUS

Enabling the Sample E-mail Workflow Process

Use this procedure to enable the sample e-mail workflow process.

To enable the sample e-mail Workflow process:

1. Navigate to Setup, then Task Management, and select Task Type.

2. For the Email Follow-up task type:

   1. Enter "Email Notification Workflow for CIC Task" in the Item Type field.

   2. In the process field, enter CUG_EMAIL_NOTIFICATION.

3. Save.

4. Make sure that the notification mailer is set up. See "Setting Up Notification Mailers " in the *Oracle Workflow Administrator's Guide*.

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Launching Workflow on Status Transition

This chapter covers the following topics:

- Implementing Workflow Launch on Status Transition

Implementing Workflow Launch on Status Transition

This procedure outlines the steps for implementing workflow launch based on status transition.

Prerequisites

❒ You must create workflows that are required for status transitions.

To set up workflow launch:

1. Navigate to Setup, Rules, Status Groups and Transitions.

   The Status Group Summary page lists status groups that have already been set up and provides the launching point for updating, copying, and creating new status groups and their transitions.

2. Select a status group and click the update icon.

3. In the Transitions section, for each status transition, select the appropriate workflow from the LOV. However, this may be optional for some status transitions as workflow launch is not required for them.

Part 5

Common HTML Module Setups

This part of the guide includes procedures common to the HTML-based modules: Customer Support, Service Desk, and Case Management.

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Configuring and Personalizing HTML Modules

This chapter covers the following topics:

- HTML Module Architecture Overview
- Configuring and Personalizing HTML Modules Process Overview
- Enabling HTML Page Personalization
- Exposed and Hidden Flexible Content in Application Pages
- About Personalizing the Advanced Search Page
- Replicating Predefined Responsibility-Level Personalizations for Case Management
- Modifying the Content of Lists
- Available Search Criteria for Advanced Search Page

HTML Module Architecture Overview

Customer Support, Service Desk, and Case Management are based on the same HTML user interface built with the Oracle Applications Framework.

Each module exposes different elements of the interface appropriate for the intended use. The others are hidden through personalization at the function level. For example, Customer Support is designed for providing support to customers so it includes regions and fields that display the customer name, contracts, and billing information. The Service Desk, a module targeted to provide support for employees within an organization, hides these regions.

Case Management adds capabilities for capturing information on parties associated to a case, the suspects and the charges against them. This capability is hidden in the other modules.

The predefined personalizations for each module are stored in a template. At implementation time, you must specify the application template that you want to use in

your implementation by setting the system profile Service: Application Template.

You can then use personalization to hide or expose content, rename tabs and fields, and make other personalization changes.

For example, Customer Support implementations may choose to expose My Tasks and Unassigned Tasks on the Agent Dashboard if agents are using tasks in the resolution of service requests.

For Case Management, you must expose customer related content in the template if you are creating a case management application for social services agencies that want to use the Oracle Install Base to track benefits.

The default Case Management application is targeted for investigative agencies resolving cases that have no client or customer, so these regions are hidden by default. (For details about which content to expose, see About Personalizing Case Management for Social Service Agencies, page 49-1.)

If you do expose hidden content, be aware that exposing one region may require you to expose other hidden regions as well. For example, you cannot expose Oracle Install Base information without also exposing customer information.

> **Note:** While Oracle Application Framework personalization makes it possible for you to make additional fields mandatory, doing so does not guarantee agents are always required to make an entry. This is because the application verifies entry in the additional mandatory field only when that field is exposed on the user interface. If the field is hidden in a subtab when the user saves, for example, the application does not enforce the entry.

Agent Dashboard Variations for Work Assignment and Distribution Models

Agents track their work and accept new assignments on the Agent Dashboard page.

Each application module includes a fully configured Agent Dashboard page with all of the available content exposed as well as three different designs personalized for common work assignment and distribution modes.

Each of these four designs is represented by a function mapped to the responsibility where you want the design to be used. To choose the design you want, you must exclude the functions you do not want in the Menu Exclusions tab of the Responsibilities window.

The following table describes each of the four available dashboard designs (functions) and specifies the work assignment and distribution mode they were designed for. (For more details about the common work assignment and distribution modes, see Implementing Work Assignment and Distribution, page 16-1.)

Dashboard Function Name	Description	Assignment and Distribution Modes
Agent Dashboard	Choose this fully configured agent dashboard design if you are setting up a work assignment and distribution model of your own. Use application personalization to hide the regions and fields you do not use.	Custom assignment and distribution.
Agent Dashboard Push	The application assigns work to agents' personal work queues. Agents choose items to work on next by selecting its link in their work queue.	Automatic assignment to individuals Manual distribution (agents choose their work from work queues)
Agent Dashboard Pull	The application decides which task or service request is the most urgent by examining both the pool of unassigned work and that already assigned to the agents' personal work queues. To get their work assignment, agents click the Get Next Work button on the dashboard. (If they already have a service request or a task open, they instead use Apply and Next or Snooze and Next to get the next most urgent work item. See Automated Work Distribution User Considerations, page 43-4.	Automatic assignment to groups Automated work distribution via the Get Next Work and Apply and Next buttons

Dashboard Function Name	Description	Assignment and Distribution Modes
Agent Dashboard Cherry Pick	The application assigns work only to groups. This means that all work shows up in the unassigned work queues on the Agent Dashboard. Agents choose their own assignments. Before working on an unassigned service request or its tasks, agents must first assign ownership of the service request to themselves using the Assign to Me function on the Actions list.	Automatic assignment to groups Manual distribution

If you are planning to develop a work assignment and distribution model that is different from the common variations listed here, you must use the fully configured agent dashboard for your personalizations.

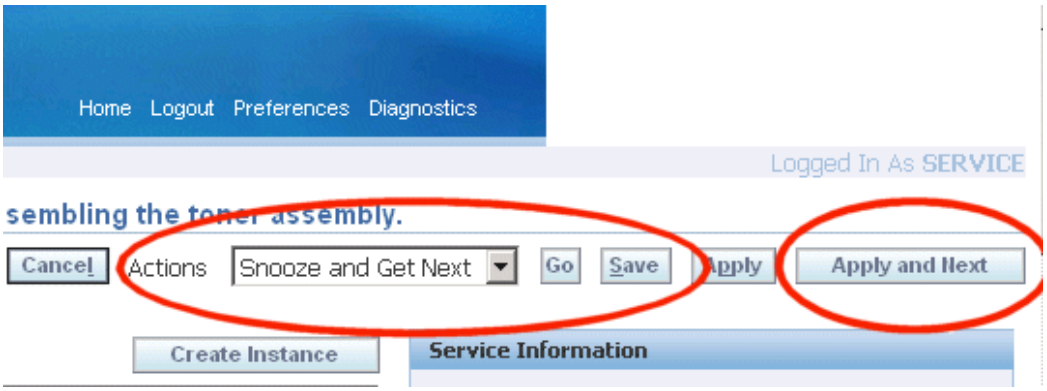
For a listing of regions in all the different dashboard designs, see Exposed and Hidden Content in Application Pages, page 43-8.

Automated Work Distribution User Considerations

If you implement automated work distribution, letting the application decide on the most important item for an agent to work on, then you must instruct agents to use the Get Next Work, Apply and Next, and Snooze and Next buttons to get their work rather than opening an item in a work queue by selecting its link.

When agents click the Get Next Work button on the Agent Dashboard, the application opens up the most urgent work item either in the Update Service Request page or the Update Task page, depending on which type of work is most urgent.

If the service request is opened via the Get Next Work button, the Service Request Update page includes the Update and Next button and the Snooze and Next choice in the Actions list (both highlighted in the image of the top right corner of the page below).



When agents complete work on the service request, they can click the Update and Next button to request the next most important work item.

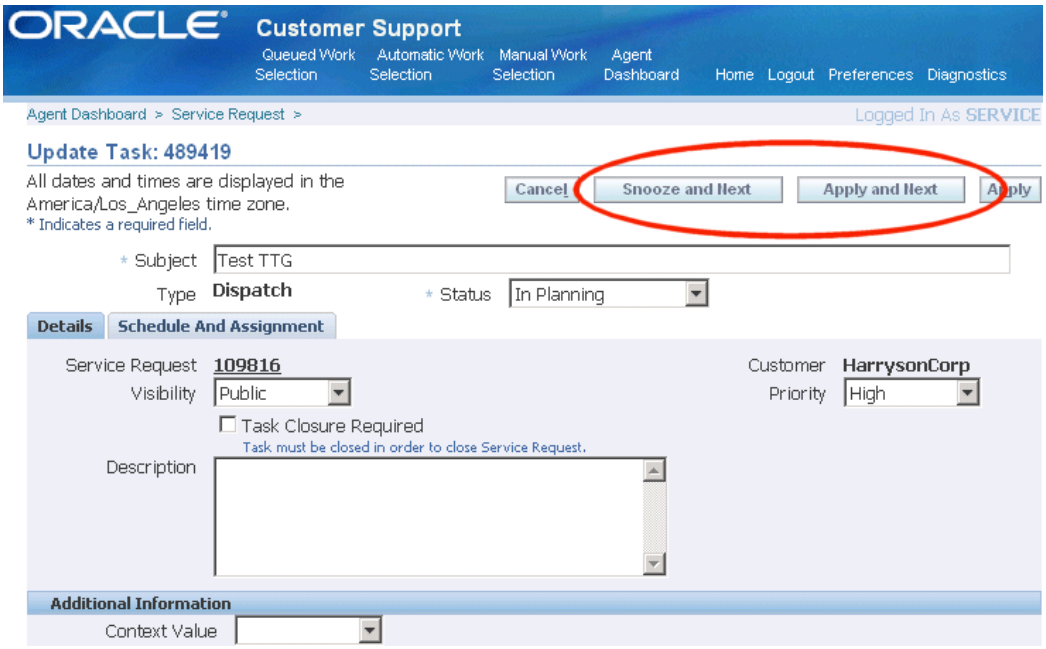
If they cannot work the service request for some reason, they can instead choose Snooze and Get Next from the Actions list and have the application open the next most urgent work item.

The application automatically delays reopening up the snoozed work item for 30 minutes.

If agents instead open up the same Service Request by clicking on the service request link directly from the Agent Dashboard, the application does not include the Apply and Get Next button or the Snooze and Get Next action.

To have the application suggest another item, users must return to the dashboard and click the Get Next Work button.

The Update Task page works the same way except that the Snooze and Get Next page appears as a button rather than an action as shown in the image below:



Configuring and Personalizing HTML Modules Process Overview

Use this procedure as a guideline for setting up user interface and other common setups for the Customer Support, Case Management, and Service Desk modules. For more information about personalization, see the *Oracle E-Business Suite Framework Personalization Guide*.

To configure and personalize your HTML module:

1. Under the System Administrator responsibility, navigate to Security, then Responsibility.

2. Create a new responsibility. You can base it on a predefined responsibility, such as Customer Support Analyst or Case Worker.

3. Create a user and associate it to the new responsibility.

4. Switch to the Functional Administrator responsibility, and navigate to Core Services, Profiles.

5. Set the system profile Service: Application Template to the template you want to implement: Customer Support, Case Management, or Service Desk.

6. Navigate to Core Services, then Caching Framework, and select Tuning.

7. Clear the system profile option cache.

8. Specify the Agent Dashboard design you want to use by excluding those you do not want from the responsibility:

    1. Under the System Administrator responsibility, navigate to the Security, then Responsibility, Define.

    2. In the Responsibilities window query the new responsibility you have created and on the Menu Exclusions tab exclude the agent dashboard designs you do not want to use. (For an explanation of these designs, see Agent Dashboard Variations to Support Different Work Assignment and Distribution Models, page 43-2.)

        The functions are:

        - Agent Dashboard

            This is the fully configured agent dashboard design you must use for personalizations if you are setting up a work assignment and distribution model different from those supported by seeded designs.

        - Agent Dashboard Cherry Pick

        - Agent Dashboard Push

        - Agent Dashboard Pull

9. Log in as the new user.

10. Make sure that personalization is enabled by setting the following system profiles to Yes:

    - FND: Personalization Region Link Enabled

    - FND: Personalization WYSIWYG Enabled

    - Personalize Self-Service Defn

11. Now you are ready to personalize your application module according to the procedures described in the *Oracle E-Business Suite Framework Personalization Guide*.

    For a list of hidden flexible content you can expose, see Exposed and Hidden Content in Application Pages, page 43-8.

    On the Advanced Search page you can expose different search parameters as described in Personalizing the Advanced Search Page, page 43-20.

12. Modify the content of the lists, such as available actions in the Service Request Update page, by modifying the underlying lookup types. You must do this to reflect the features you have implemented. For example, if you have not

implemented Oracle Web Collaboration integration, then you must hide the Web Conferencing action in the Service Request Update page. For details, see Modifying the Content of Lists, page 43-29.

13. If you are implementing Case Management, you must personalize pages from other application modules to conform with case management terminology and features. The required personalizations are seeded under the Case Worker responsibility, but must be repeated for every new responsibility. For details, see Replicating Predefined Responsibility-Level Personalizations for Case Management , page 43-27.

Enabling HTML Page Personalization

You can turn on the HTML page personalization by setting the following system profiles to Yes:

- FND: Personalization Region Link Enabled
- FND: Personalization WYSIWYG Enabled
- Personalize Self-Service Defn

See *Oracle E-Business Suite Framework Personalization Guide* for further details.

Exposed and Hidden Flexible Content in Application Pages

The tables in this section list the exposed and hidden flexible content for each application page for each of the seeded application templates.

Please note that some templates exclude regions available in others as indicated. You can only display a hidden feature; not an excluded one.

You can add most of the hidden content by the usual personalization procedures. However, some pages require additional setup. For example:

- To add the Contracts region to the Update Service Request page, you must not only add it, but also specify its rendered property as true.
- The Agent Dashboard comes in four different design variations, so you must first specify which one you want to use before making any changes using personalization.
- The Advanced Search page requires yet additional setups to display or hide fields (see Personalizing the Advanced Search Page, page 43-20.)

Please note that adding flexible content to a page layout does not by itself guarantee that the regions and fields within it display on the page. If the desired content does not appear, please check that the rendered property of the flexible content and the rendered

properties of its constituent regions and fields are all set to "True".

If you add flexible content with a region that does not have its rendered property set to "True", for example, that specific region does not display on the page.

Some application content does not display unless the application requires it, regardless of your setting. For example, the Service Request Update page does not display Instance Notes or Previous Service Requests unless you enter an Oracle Install Base item instance into the service request and save.

Agent Dashboard Page

Each application module includes four variations of the agent dashboard design. You must select one of these variations as the Agent Dashboard for your implementation before personalizing it. (This is accomplished by excluding all of the others with menu exclusions for your responsibility. For details, see Setting Up the User Interface and Other Common Setups, page 43-6.)

> **Note:** You must expose the hidden flexible content in all dashboard designs by setting their rendering properties to True. The content does not appear in the list of values in the Add Region button.

Hidden and Exposed Content on the Customer Support Agent Dashboard

The following table lists the available (A), hidden (H), and excluded (X) content of the four different Agent Dashboard designs for Customer Support:

Flexible Content or Region	Agent Dashboard (All Content Exposed)	Agent Dashboard Pull	Agent Dashboard Push	Agent Dashboard Cherry Pick
Next Work	H	H	H	H
Request Work	H	H	H	H
Universal Work Queue	H	H	H	H
Get Next Work	A	A	H	H
My Service Requests	A	A	A	A

Flexible Content or Region	Agent Dashboard (All Content Exposed)	Agent Dashboard Pull	Agent Dashboard Push	Agent Dashboard Cherry Pick
My Tasks	A	H	H	H
Unassigned Service Requests	A	H	H	A
Unassigned Tasks	A	H	H	H
Party Search	X	X	X	X
Create Case	X	X	X	X
KPI Bin	A	A	A	A
Create SR Bin	A	A	A	A
My Links	A	A	A	A
Assignment Region	A	H	A	H
Advanced Search	A	A	A	A
Workflow Notification	X	X	X	X

Hidden and Exposed Content on the Service Desk Agent Dashboard

The following table lists the available (A), hidden (H), and excluded (X) content of the four different Agent Dashboard designs for the Service Desk:

Flexible Content or Region	Agent Dashboard (All Content Exposed)	Agent Dashboard Pull	Agent Dashboard Push	Agent Dashboard Cherry Pick
Get Next Work	A	A	H	H
My Service Requests	A	A	A	A
My Tasks	A	A	A	A
Unassigned Service Requests	A	H	H	A
Unassigned Tasks	A	H	H	A
Party Search	X	X	X	X
Create Case	X	X	X	X
KPI Bin	A	A	A	A
Create SR Bin	A	A	A	A
My Links	A	A	A	A
Assignment Region	A	H	A	H
Advanced Search	A	A	A	A
Workflow Notification	X	X	X	X

Hidden and Exposed Content on the Case Management Agent Dashboard

The following table lists the available (A), hidden (H), and excluded (X) content of the four different Agent Dashboard designs for Case Management:

Flexible Content or Region	Agent Dashboard (All Content Exposed)	Agent Dashboard Pull	Agent Dashboard Push	Agent Dashboard Cherry Pick
Next Work	H	H	H	H
Request Work	H	H	H	H
Universal Work Queue	H	H	H	H
Get Next Work	A	A	H	H
My Cases	A	A	A	A
My Tasks	A	A	A	A
Unassigned Cases	A	H	H	A
Unassigned Tasks	A	H	H	A
Party Search	A	A	A	A
Create Case	A	A	A	A
KPI Bin	H	H	H	H
Create SR Bin	X	X	X	X
My Links	A	A	A	A
Assignment Region	A	H	H	H
Advanced Search	A	A	A	A
Workflow Notification	A	A	A	A

Create Service Request Page Exposed and Hidden Content

The following table lists the available (A), hidden (H), and excluded (X) page components for the Create Service Request page for each of the three application modules.

Flexible Content or Region	Customer Support	Case Management	Service Desk
Customer Search page	X	A	X
Customer service keys	A	H	A
Customer contact	A	X	A
Subject region	A	H	A
Summary and notes	A	A	A
Flexfields	H	H	H
Extensible attributes	A	A	A
Service request type extensible attributes	A	A	A
Request header information	A	A	A
Assignment region	A	A	A
Incident address region	A	A	H
Bill-to address region	A	H	H
Ship-to address region	A	H	H
Contract region	A	A	A

Flexible Content or Region	Customer Support	Case Management	Service Desk
Relationship plans region (Service Info.)	A	H	X
Associated party roles region	X	A	X
Associated party search	X	A	X
Create associated party information	X	A	X
Update associated party information	X	A	X

Update Service Request Page Exposed and Hidden Content

The following tables list the available (A), hidden (H), and excluded (X) page content for the Update Service Request page for each of the three application modules.

Please note that you must expose hidden content marked with an asterisk (*) by changing that regions rendered property to "True". These regions do not appear in the list of values for adding regions.

If you are using the HTML charges feature you can use either the Charges region in the Update Service Request page or the standalone Charges page.

If you opt to use the Charges region in the Update Service Request page, then disable the Charges and Service Logistics option in the Actions list by specifying an end date for the lookup code Charges and Service Logistics, which is part of the CSZ_GLOBAL_ACTIONS lookup type.

If you opt to use the standalone Charges page, then hide the Charges region in the Update Service Request page through OA Personalization.

If you are using the new charges feature in HTML, then disable the existing Charges tab in the Forms interface by adding the Access Charges Tab function to the list of Menu Exclusions for that responsibility.

Header Region

The following table lists the page content in the page header region:

Flexible Content or Region	Customer Support	Case Management	Service Desk
Issue region	A	A	A
Subject region	A	H	A
Summary region	A	A	A
Flexfields region	H	H	H
Global extensible attributes	A	A	A
Service request type extensible attributes	A	A	A

Information Bins

The following table lists the information in page containers:

Flexible Content or Region	Customer Support	Case Management	Service Desk
Service information	A	H	H
Search knowledge	A	A	A
Primary contact	A	H*	A
My Links	A	A	A

Subtabs

This table lists the information in the subtabs:

Flexible Content or Region	Customer Support	Case Management	Service Desk
Service request log	A	A	A

Flexible Content or Region	Customer Support	Case Management	Service Desk
Additional service request attributes	A	A	A
Contracts region*	A	H	H
Bill-to address region	A	H	H
Ship-to address region	A	H	H
Incident address region	A	A	H
Tasks region	A	A	H
Linked solutions	A	A	A
Attachments region	A	A	A
Related service requests	A	A	A
Related objects	A	A	H
Instance notes	A	H	H
Instance service requests	A	H	H
Associates parties region	X	A	X
Resolutions region	A	A	A
Request dates region	A	A	A

Notes

This table lists the information in the notes region:

Flexible Content or Region	Customer Support	Case Management	Service Desk
Notes region	A	A	A

Read-Only Service Request Information Page

The following table lists the available (A), hidden (H), and excluded (X) page content for the Read-Only Service Request page for each of the three application modules.

Please note that for you must expose the hidden Subject Region in Case Management, marked with an asterisk (*), by changing that region's rendered property to "True". This content does not appear in the list of values for adding regions.

Flexible Content or Region	Customer Support	Case Management	Service Desk
Issue Region	A	A	A
Subject Region	A	H*	A
Summary Region	A	A	A
Flex Fields Region	H	H	H
Global Extensible Attributes	A	A	A
Service Request Type Extensible Attributes	A	A	A
Primary Contact Region	A	H	A
All Notes	A	A	A
Contracts Region	A	A	A
Incident Address Region	A	A	H
Attachments Region	H	H	H

Flexible Content or Region	Customer Support	Case Management	Service Desk
Related Service Request	A	A	A
Related Objects	H	H	H
Associates Parties Region	X	A	X

Advanced Search Page Exposed and Hidden Content

The following tables list the available (A), hidden (H), and excluded (X) page content for the Advanced Search page for each of the three application modules.

Flexible Content and Region	Customer Support	Case Management	Service Desk
Service request attributes	A	A	A
Global and context sensitive index attributes	A	A	A
Other extensible attributes	H	A	H
Associated party region	X	A	X
Key word region	A	A	A
Dates region	A	A	A
Display columns region	H	H	H
Sort order columns region	H	H	H

Flexible Content and Region	Customer Support	Case Management	Service Desk
Results without associated party roles	A	X	A
Results with associated party roles	X	A	X

Saved Search Page Exposed and Hidden Content

The following tables list the available (A), hidden (H), and excluded (X) page content for the Saved Search page for each of the three application modules.

Flexible Content or Region	Customer Support	Case Management	Service Desk
Title region	A	A	A
Advanced search	A	A	A
Results without associated party roles	A	X	A
Results with associated party roles	X	A	X

Party Information Page Exposed and Hidden Content

The following tables list the available (A), hidden (H), and excluded (X) page content for the Party Information page for each of the three application modules.

Component or Region	Customer Support	Case Management	Service Desk
Profile tab	A	A	A
Address Book tab	A	A	A

Component or Region	Customer Support	Case Management	Service Desk
Relationships and Classifications tab	A	A	A
Service Request/Cases tab	X	A	X

About Personalizing the Advanced Search Page

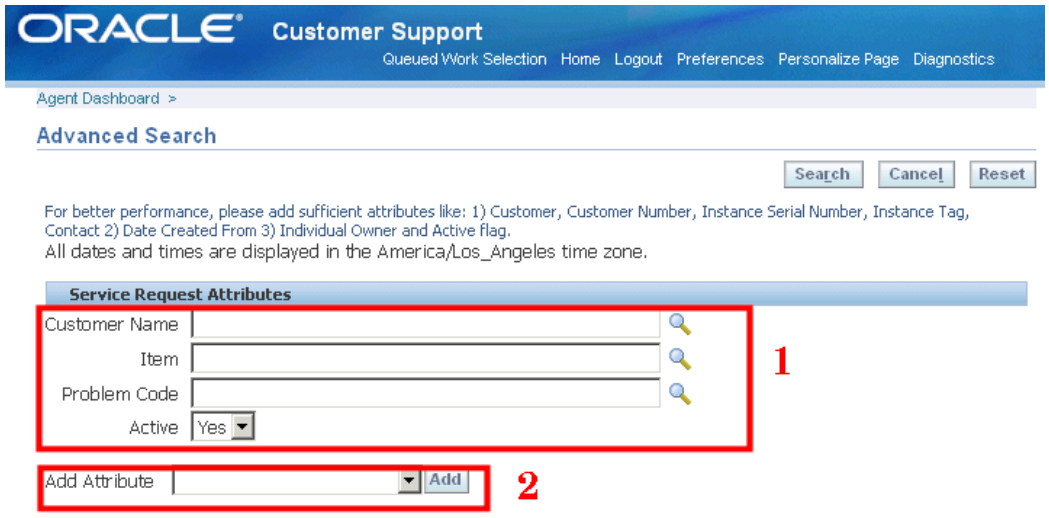
This topic outlines different ways you can personalize the Advanced Search page in Customer Support, Service Desk, and Case Management. It shows how you can specify:

- The attributes that you want to display as the default search criteria.
- The attributes that agents can select as their search criteria from the Add Criteria list.
- The columns that appear in the search results.

For example, you may want to hide the contract-related search criteria if you are not using Oracle Service Contracts.

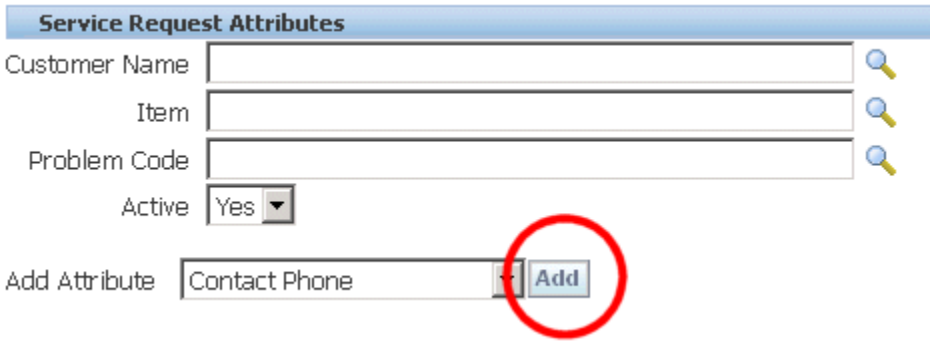
About Specifying Search Criteria for the Service Request Attributes Region

The Service Request Attributes region located at the top of the Advanced Search page contains the most frequently used search criteria.

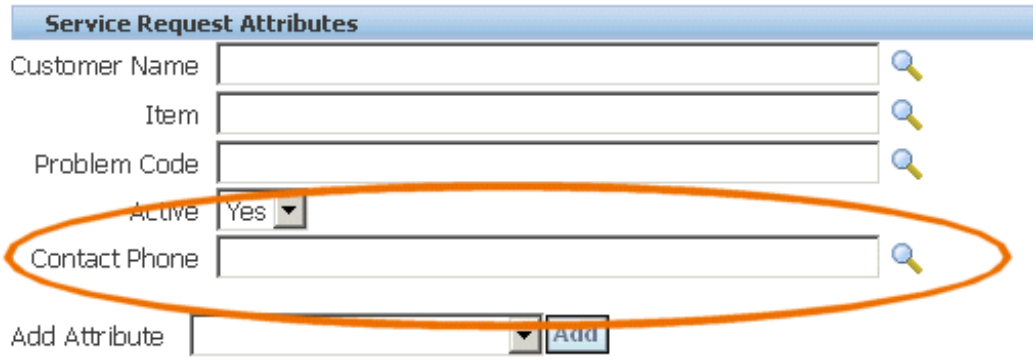


The page displays some of the search parameters as fields by default (region 1 in the above image).

Users can add additional search criteria with the Add Attribute list (region 2). For example, to search by contact phone, an agent chooses contact phone from the Add Attribute drop-down list and clicks **Add**:



The Contact Phone appears as a new field right below the default parameters (as highlighted in the image below):



You can specify the search fields:

- That are display in the region, by default.
- That appear in the list and must be added by agents manually.
- That do not appear at all.

The behavior is controlled by two personalization properties:

- Read only
- Rendered

The following table shows how to set the two parameters Read Only and Rendered to get the desired behavior:

Search Parameter Behavior	Read Only	Rendered
Displayed as one of the default fields	False	True
Listed in the Add Attribute list	False	False
Hidden completely	True/False	False

Exposing the search parameter as a field on the page automatically removes it from the list and vice versa. Hiding a field removes it from both the list and the page.

See Displaying Internal Severity as One of the Default Search Criteria, page 43-23 for a sample of how you can expose one of the search parameters as a default search field.

See Removing Problem Code from the Search Criteria, page 43-25 for a sample of how you can remove a search parameter from the Attribute list.

Note: The method of using a combination of Rendered and Read Only personalization parameters to display and hide fields discussed in this section applies only to the Service Request Attributes region of the Advanced Search page.

Different application modules expose different search criteria. For the list of displayed and hidden search parameters for each module see Available Search Criteria, page 43-44.

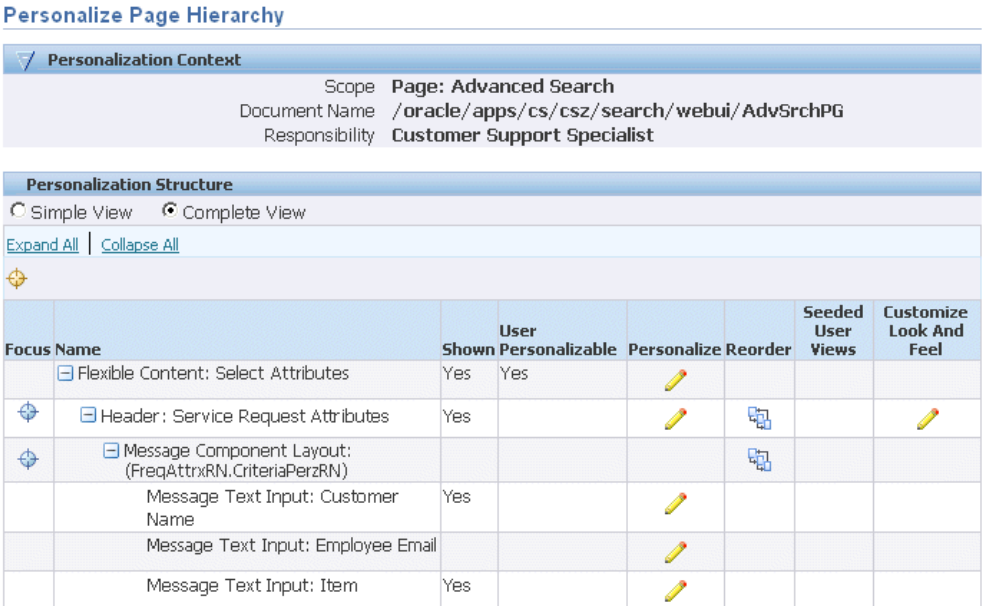
Example: Displaying Internal Severity as One of the Default Search Fields

In this example, you are adding the field Internal Severity as one of the default search fields in the Service Request Attributes region of the Advanced Search Page.

To add Internal Severity as one of the default search fields:

1. Navigate to the Advanced Search Page.
2. Select the Personalize Page link at the top of the page.
3. Choose the site or a responsibility for the Personalization level and click **Go**.
4. Select the Content subtab.
5. Click on the Personalize Properties icon for the Service Request Attributes region.

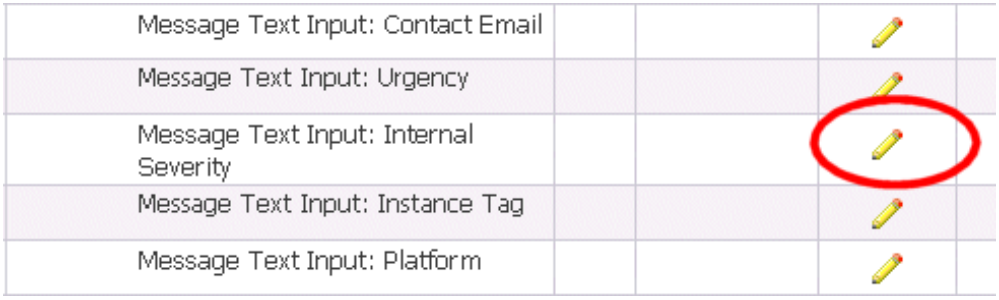
   The Personalize Page Hierarchy page displays.



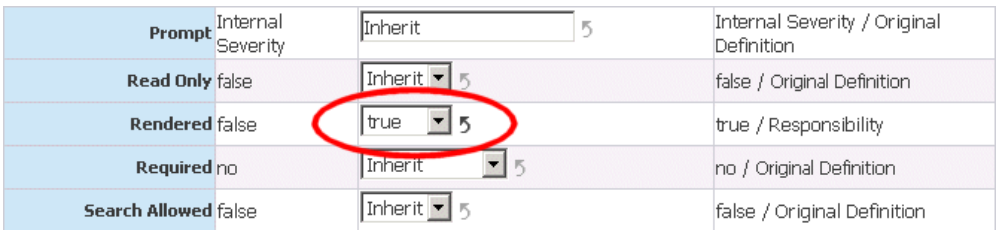
6. Select **Complete View** and **Expand All**.

7. Using the browser's search utility, find "Internal Severity" on the page and click the Personalize icon.

   The Personalize Message Text Input: Internal Severity page appears.



8. Set Rendered to "True".



9. Click **Apply**.

To view the new search criteria, you must log out and log in again.

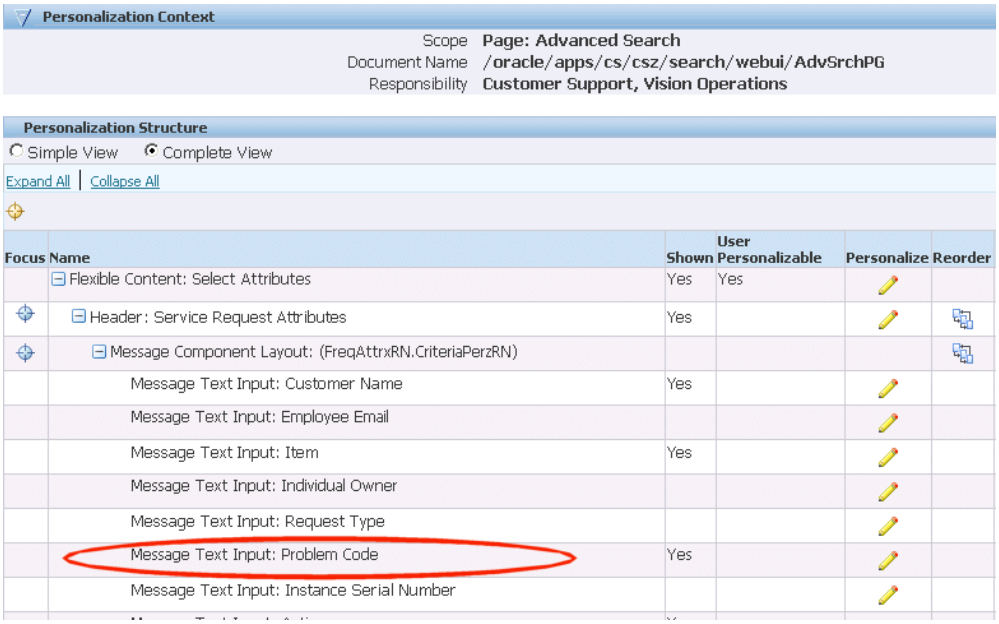
Example: Removing Problem Code from the Search Criteria

The following example explains how you can remove Problem Code from the Add Criteria list. The application automatically removes this parameter from the search results page as well.

To remove Problem Code from the Add Criteria list:

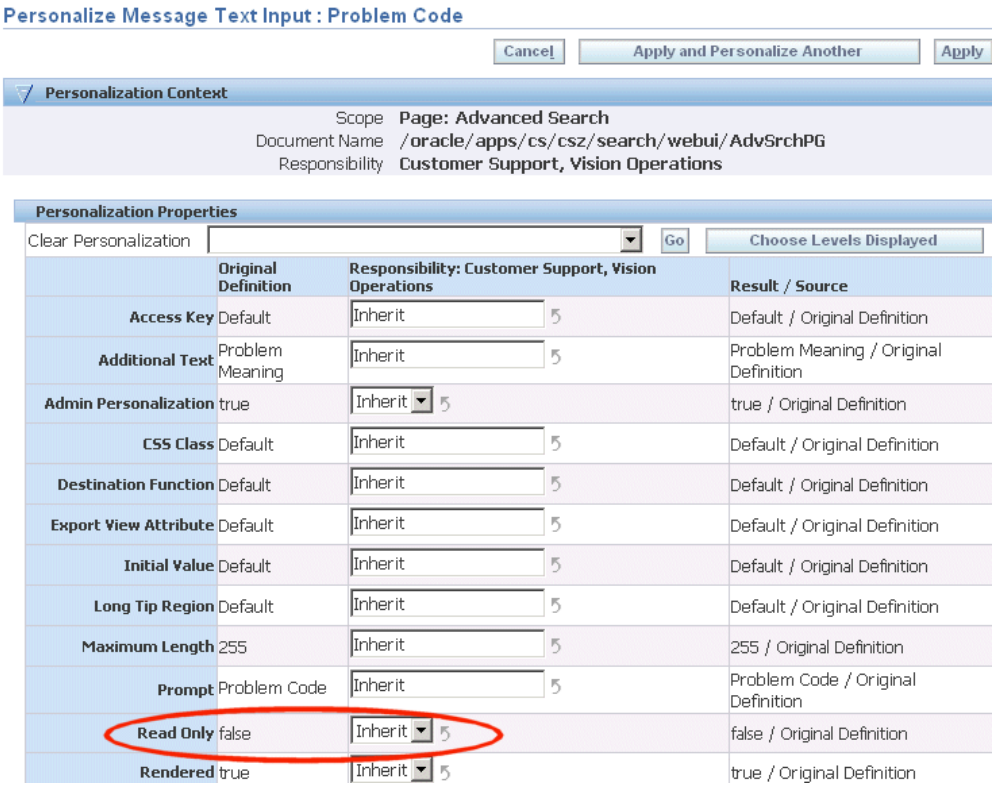
1. Under the responsibility you want to personalize, navigate to the Advanced Search Page.
2. Click the Personalize Page link (located at the very top of the page).
3. Choose the site or a responsibility as the personalization context and click **Go**.
4. Select the Content tab.
5. Click the Personalize Properties icon for the Service Request Attributes region.

   The Personalize Page Hierarchy page displays.
6. Select **Complete View** and **Expand All**.
7. Using the browser's search utility, find "Problem Code" and click the Personalize icon.



The Personalize Message Text Input: Problem Code page appears.

8. Set the Read Only property (highlighted in the image below) to "True".



9. Click **Apply**.

To verify the search parameter is removed from use, you must log out and log in again.

Replicating Predefined Responsibility-Level Personalizations for Case Management

For Oracle Case Management, some application pages (Knowledge Management and Advanced Search) are personalized at the responsibility level to change the terminology from "service request" to "case", for example.

You must replicate these predefined personalizations for every responsibility you create.

Perform the following responsibility-level personalizations:

1. Under the Service responsibility, navigate to Agent Dashboard, Update SR Page, KM Search, Advanced Solution Search.

2. Hide the Products and Platforms regions.

3. Navigate to Agent Dashboard, Update SR Page, KM Search, Create Solution.

4. Hide the Products and Platforms regions.

5. Navigate to Agent Dashboard, Update SR Page, KM Search, Personalize Table Layout: (SearchCriteriaRN).

6. Hide the Item field.

7. Navigate to Agent Dashboard, Advanced Search, Personalize Problem Code LOV and personalize the following elements:

   - <modify element="TopRN" text="Search and Select: Issue Type"/>
   - <modify element="SearchText" prompt="Issue Type"/>
   - <modify element="ProbCodeNameHdr" prompt="Issue Type"/>
   - <modify element="SelectedRN" text="Search Issue Types"/>
   - <modify element="ProbCodeNameSelHdr" prompt="Issue Type"/>

8. Navigate to Agent Dashboard, Advanced Search, Personalize Resolutions Code LOV and personalize following elements:

   - <modify element="TopRN" text="Search and Select: Resolution Type"/>
   - <modify element="SearchText" prompt="Resolution Type"/>
   - <modify element="ResCodeNameHdr" prompt="Resolution Type"/>
   - <modify element="SelectedRN" text="Selected Resolution Types"/>
   - <modify element="ResCodeNameSelHdr" prompt="Resolution Type"/>

9. Navigate to Agent Dashboard, Advanced Search, Personalize Service Request Type LOV and personalize following elements:

   - <modify element="TopRN" text="Search and Select: Case Type"/>
   - <modify element="SearchText" prompt="Case Type"/>
   - <modify element="SRTypeHdr" prompt="Case Type"/>
   - <modify element="SelectedRN" text="Selected Case Types"/>
   - <modify element="SRTypeSelHdr" prompt="Case Type"/>

Modifying the Content of Lists

You can modify the content of lists in your application by hiding or exposing content. You must hide a selection, for example, when you have not implemented the corresponding feature.

Except for the Add Criteria list on the Advanced Search page, the lists in the user interface are controlled by lookups.

(The Add Criteria list of values are part of the application code and must be modified through personalization as described in a separate topic.)

There is a separate lookup type for the same feature in each application module.

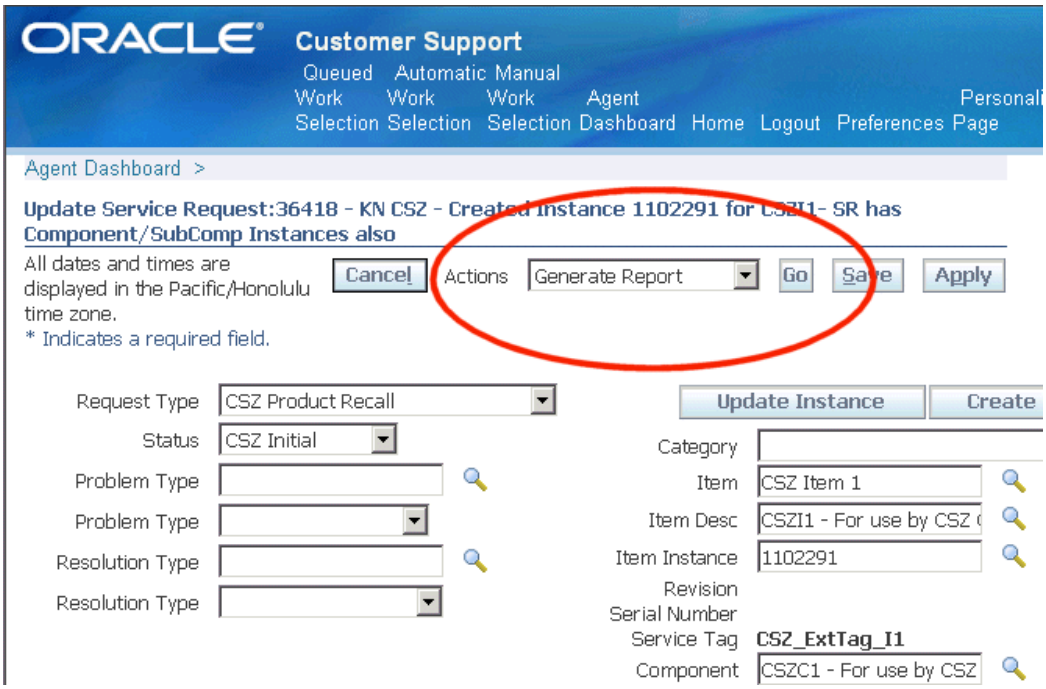
> **Note:** The lookup type internal names for all the modules start with CSZ and are similar. Case Management lookups contain a "_CASE" suffix. For Service Desk they contain "_SDESK".

You can disable or expose different values (lookup codes) in the lookups by logging in under the Functional Administrator responsibility and navigating to the Core Services tab and the Lookups subtab.

You must disable lookup codes for features that you have not implemented in your application and ensure that those that are used are enabled.

Example of When You Must Disable Codes

For example, by default the Actions list on the Update Service Request page (highlighted in the image below) includes the Generate Report code which generates a service request report.



If you have not implemented Oracle XML Publisher integration for generating reports, as described in Enabling Service Request Reports, page 20-1, then you must specify an end date for the code in the lookup so that it does not appear as a selection for agents.

Example of When You Must Enable Codes

If you have enabled Web conferencing, as described in Setting Up Web Collaboration, page 24-1, then you must enable the Start Conference entry in the Actions list by deleting the end date of the lookup code.

The following sections provide the lookup types for the lists in Customer Support, Service Desk, and Case Management.

Customer Support Lookups

The following table details the Customer Support lists and their corresponding lookup types and codes. The Enabled/Disabled Codes column, which lists the codes by their meaning, specifies those codes that are enabled and disabled by default.

> **Note:** Adding additional attributes for use with the Quick Find may degrade search performance.

List	Lookup Type	Enabled/Disabled Codes
Agent Dashboard, QuickFind	CSZ_SRCH_QUICKFIND_CODE	Enabled: • Account • Contact Email • Contact Phone • Contract Number • Customer Email • Customer Name • Customer Number • Customer Phone • Employee Email • Employee Name • Employee Number • Project Number • Serial Number • Service Request Number • Service Tag • System Name

List	Lookup Type	Enabled/Disabled Codes
Agent Dashboard, Create Service Request bin, Service Key	CSZ_INCIDENT_SKTYPES	Enabled: • Account • Contact Email • Contact Name • Contact Phone • Contract Number • Customer Email • Customer Name • Customer Phone • Employe Email • Employee Name • Employee Number • Service Request Number • Instance • Instance Current Location • Customer Number • Serial Number • System Name • Service Tag

List	Lookup Type	Enabled/Disabled Codes
Update Service Request, Global Actions	CSZ_GLOBAL_ACTIONS	Enabled: • Assign to Me • Audit Report • Charges and Service Logistics • Copy Service Request • Create Solution • E-Record Detail • Generate Report • Profit Margin Report • Search For Similar • Service Request Escalation • Snooze and Get Next • View Cost Details Disabled: • Start Conference • Create Task • Create Task from Template

List	Lookup Type	Enabled/Disabled Codes
Update Service Request, Audit Report	CS_SR_AUDIT_FIELDS	Enabled • Account • Bill To Account Number • Bill To Address • Bill To Contact • Bill To Party • Channel • Close Date • Component • Component Version • Contract Number • Customer • Database • Database Version • Error Code • Expected Resolution Date • Expenditure Org • Group Name • Group Type • Incident Address • Incident Occured Date • Item Instance

List	Lookup Type	Enabled/Disabled Codes
		• Language • Maintenance Org • Obligation Date • Operating System • Order Number • Owner • Platform • Platform Version • Problem • Project • Project Number • Project Task Number • Publish • Resolution Code • Resolution On • Resolved On • Resource Type • Responded On • Revision • SLA Date 1 • SLA Date 2

List	Lookup Type	Enabled/Disabled Codes
		• SLA Date 3 • SLA Date 4 • SLA Date 6 • SLA Duration 1 • SLA Duration 2 • Sales PO Number • Serial • Severity • Ship To Account Number • Ship To Address • Ship To Party • Ship to Contact • Site • Status • Sub Component • Sub Component Version • System • Tag • Ticket Number • Tier • Tier Version

List	Lookup Type	Enabled/Disabled Codes
		• Time Zone • Type • Urgency

Service Desk Lookups

The following table lists the Service Desk lists and their corresponding lookup types and codes. The Enabled/Disabled Codes column, which lists the codes by their meaning, specifies those codes that are enabled and disabled by default.

> **Note:** Adding additional attributes for use with the Quick Find may degrade search performance.

List	Lookup Type	Enabled/Disabled Codes
Agent Dashboard, QuickFind	CSZ_SRCH_QUICKFIND_CODE_SDESK	Enabled: • Employee Email • Employee Name • Employee Number • Project Number • Serial Number • Service Request Number • Service Tag • System Name Disabled: • Account • Contact Email • Contact Phone • Contract Number • Customer Email • Customer Name • Customer Number • Customer Phone

List	Lookup Type	Enabled/Disabled Codes
Agent Dashboard, Create Service Request bin, Service Key	CSZ_INCIDENT_SKTYPES_SDESK	Enabled: • Employee Email • Employee Name • Employee Number • Service Request Number • Instance • Instance Current Location • Serial Number • System Name • Service Tag Disabled: • Account • Contact Email • Contact Name • Contact Phone • Contract Number • Customer Email • Customer Name • Customer Phone

List	Lookup Type	Enabled/Disabled Codes
Update Service Request, Global Actions	CSZ_GLOBAL_ACTIONS_SDESK	Enabled: • Assign to Me • Audit Report • Copy Service Request • Create Solution • E-Record Detail • Generate Report • Search For Similar • Service Request Escalation • Snooze and Get Next Disabled: • Start Conference

Case Management Lookups

The following table lists the Case Management lists and their corresponding lookup types and codes. The Enabled/Disabled Codes column, which lists the codes by their meaning, specifies those codes that are enabled and disabled by default.

> **Note:** Adding additional attributes for use with the Quick Find may degrade search performance.

List	Lookup Type	Enabled/Disabled Codes
Agent Dashboard, QuickFind	CSZ_SRCH_QUICKFIND_CODE_CASE	Enabled: • Case Number Disabled: • Account • Contact Email • Contact Phone • Contract Number • Customer Email • Customer Name • Customer Number • Customer Phone • Employee Email • Employee Name • Employee Number • Serial Number • Service Tag • System Name

List	Lookup Type	Enabled/Disabled Codes
Update Case, Global Actions	CSZ_GLOBAL_ACTIONS_CASE	Enabled: • Assign to Me • Audit Report • Case Escalation • Copy Case • Create Solution • E-Record Detail • Generate Report • Search For Similar • Snooze and Get Next Disabled: • Start Conference
Filter By (Party Information page, Cases subtab)	CSZ_CASE_FILTER_BY	Enabled: • Associated Role • Case Number • Case Type
Search For Type (Party Search page)	CSZ_CASE_SEARCH_FOR_TYPE	Enabled: • Employee Name • Organization • Person

ITIL Lookups

The following table lists ITIL lists and their corresponding lookup types and codes. The

Enabled/Disabled Codes column, which lists the codes by their meaning, specifies those codes that are enabled and disabled by default.

List	Lookup Type	Enabled/Disabled Codes
Agent Dashboard, Create Service Request bin, Service Key	CSZ_INCIDENT_SKTYPES_SDESKITIL	Enabled: • Configuration Item • Configuration Item Currrent Location • Employee Email • Employee Name • Employee Number • Service Request Number • Instance Current Location • Serial Number • System Name • Service Tag • Ticket Number

List	Lookup Type	Enabled/Disabled Codes
Update Service Request, Global Actions	CSZ_GLOBAL_ACTIONS_ITIL	Enabled: • Assign to Me • Audit Report • Copy Ticket • Create Solution • E-Record Detail • Generate Report • Search For Similar • Snooze and Get Next • Ticket Escalation
Agent Dashboard, QuickFind	CSZ_SRCH_QUICKFIND_CODE_ITIL	Enabled: • Employee Email • Employee Name • Employee Number • Project Number • Serial Number • Ticket Number • Tag • System Name

Available Search Criteria for Advanced Search Page

The different application modules expose different choices for search criteria on the Advanced Search page as described in this section.

Note: Extensible attributes you set up appear automatically among the search criteria. You cannot hide or expose them using Oracle Applications Personalization. For details, see Where Extensible Attributes Are Displayed, page 45-3.

Available Search Criteria for Customer Support

The following table lists the exposed search criteria on the Advanced Search Page:

Search Criteria Exposed as Fields	Description
Customer Name	The person or organization that is the customer for the service request.
Item	Inventory item.
Problem Code	Service request problem code.
Active	Has not been end-dated.

The following table lists the search criteria on the Add Attribute list:

Search Criteria on the Add Attribute List	Description
Assigned Group	Assigned group owner of the service request.
Channel	Service request creation channel.
Contact Email	E-mail of the customer contact (different from the service request contact).
Contact Name	Customer contact name.
Contact Phone	Customer contact phone number.
Contact Number	The ID for the customer contact record.
Created By	The name of the person who created the service request.

Search Criteria on the Add Attribute List	Description
Employee Name	Employee in HRMS who has been set up as a resource.
Employee Email	Employee e-mail address.
Employee Number	The HRMS ID for the employee.
Employee Phone	Employee phone number.
Project Number	The number for the project.
Project Task Number	The number for the task related to the project.
Escalated	The service request has been escalated through the Escalation Manager.
Individual Owner	Agent currently assigned ownership of the service request.
Serial Number	Serial number of a customer product (instance) tracked by Oracle Install Base.
Service Tag	Internal ID for the Oracle Install Base instance.
Internal Severity	Service request severity.
Jeopardy	Service requests in jeopardy of missing due dates. See Setting Up Jeopardy for Service Requests, page 44-6.
Maintenance Org	Maintenance organization in Oracle Inventory.
Missed Deadline	Returns service requests with any missed deadline.
Number	Service request number.
Platform	Oracle Install Base platform.
Request Type	Service request type.

Search Criteria on the Add Attribute List	Description
Resolution Code	Service request resolution code.
Status	Service request status.
System	Oracle Install Base system name.
Unowned	Not owned by any individual.
Urgency	Service request urgency.

Available Search Criteria for Case Management

The following table lists the search criteria exposed on the Advanced Search page for Case Management:

Search Criteria Exposed as Fields	Description
Owner	Case owner.
Case Type	Uses the same setups as service request type.
Issue Type	Uses the same setups as problem code.

The following table lists the available search criteria in the Add Attribute list:

Search Criteria on the Add Attribute List	Description
Active	Active cases.
Escalated	Cases escalated via the Escalation Manager.
Jeopardy	Cases in jeopardy of missing due dates. See Setting Up Jeopardy for Service Requests, page 44-6.
Missed Deadline	Cases with any missed deadline.

Search Criteria on the Add Attribute List	Description
Resolution Type	Case resolution type. Uses the same setups as service request resolution type.
Internal Severity	Case severity set up as service request severity.
Status	Case status. Set up as service request status.
Unowned	Case not owned by any individual.
Urgency	Case urgency. Set up as service request urgency.

You can expose additional criteria listed in the table below in the Add Attribute list. By default, these are hidden.

Hidden Search Criteria on the Add Attribute List	Description
Item	Oracle Inventory item.
Account	Customer account.
Channel	Service request creation channel.
Contact Name	Customer contact name.
Contact Email	Customer contact e-mail address.
Contact Phone	Customer contact phone number.
Contract Number	Number of the associated contract created in Oracle Service Contracts.
Customer Name	The person or organization that is the customer for the case.
Customer Email	Customer e-mail address.
Customer Number	Customer ID.

Hidden Search Criteria on the Add Attribute List	Description
Created By	The name of the person who created the case.
Customer Phone	Customer phone number.
Employee Name	Employee name.
Employee Email	Employee e-mail address.
Employee Number	Employee HRMS ID number.
Employee Phone	Employee phone number.
Serial Number	Serial number of a customer product (instance) tracked by Oracle Install Base.
Service Tag	Internal ID for the Oracle Install Base instance.
Instance System	Oracle Install Base system name.
Platform	Oracle Install Base platform name.

Available Search Criteria for Service Desk

The following table lists the exposed search criteria on the Advanced Search page for the Service Desk:

Search Criteria Exposed as Fields	Description
Employee Email	Employee e-mail address.
Item	Oracle Inventory item.
Serial Number	Serial number of a customer product (instance) tracked by Oracle Install Base.
Active	Searches only search requests that have not been closed.

The following table lists the available search criteria in the Add Attribute list:

Search Criteria on the Add Attribute List	Description
Assigned Group	Assigned group owner of the service request.
Channel	Service request creation channel.
Employee Name	Name of employee in HRMS who has been set up as a resource.
Employee Number	The HRMS ID for the employee.
Employee Phone	Employee phone number.
Escalated	The service request has been escalated through the Escalation Manager.
Individual Owner	Agent currently assigned ownership of the service request.
Internal Severity	Service request severity.
Jeopardy	Service requests in jeopardy of missing due dates. See Setting Up Jeopardy for Service Requests , page 44-6.
Maintenance Org	Maintenance organization in Oracle Inventory.
Missed Deadline	Returns service requests with any missed deadline.
Number	Service request number.
Platform	Oracle Install Base platform.
Problem Code	Service request problem code.
Request Type	Service request type.
Resolution Code	Service request resolution code.
Service Tag	ID of the Oracle Install Base instance.

Search Criteria on the Add Attribute List	Description
Status	Service request status.
System Name	Oracle Install Base system name.
Unowned	Not owned by any individual.
Urgency	Service request urgency.

You can expose additional criteria listed below, in the Add Attribute list for Service Desk. By default, these are hidden.

Hidden Search Criteria on the Add Attribute List	Description
Account	Customer account.
Customer Number	Customer ID.
Customer Name	The person or organization that is the customer for the service request.
Customer Phone	Customer phone number.
Customer Email	Customer e-mail address.
Contact Name	Customer contact name.
Contact Email	Customer contact e-mail address.
Contact Phone	Customer contact phone number.
Contract Number	Number of the associated contract created in Oracle Service Contracts.
Created By	The name of the person who created the service request.
Employee Email	Employee e-mail address.

Hidden Search Criteria on the Add Attribute List	Description
Employee Number	Employee HRMS ID number.
Employee Phone	Employee phone number.
Project Number	The number for the project.
Project Task Number	The number for the task related to the project.
Serial Number	Serial number of a customer product (instance) tracked by Oracle Install Base.
Service Tag	Internal ID for the Oracle Install Base instance.
Instance System	Oracle Install Base system name.
Platform	Oracle Install Base platform name.

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Other Common HTML Setups

This chapter covers the following topics:

- Specifying the Default Customer for Case Management and Service Desk
- Enabling Multiple HTML Modules in a Single Instance
- Modifying Notes
- Viewing Audit History
- Understanding Key Performance Indicators
- Setting Up Key Performance Indicators
- Setting Up Jeopardy for Service Requests

Specifying the Default Customer for Case Management and Service Desk

Most Service Desk and Case Management implementations do not require agents to enter customer information.

This is because service desks help employees working in a single organization (the customer). Investigative agencies usually create cases on behalf of a single organization as well.

For this reason, both the Service Desk and Case Management modules hide customer information pages by default.

Because service requests and cases do require customer entry, you must set a default customer by setting the system profile Service: Default Customer Name.

If you want agents to capture customer information in every service request or case, then make sure that this system profile is left null and that you expose the various customer information regions using the Personalization feature.

Enabling Multiple HTML Modules in a Single Instance

To run multiple TeleService modules in a single instance, you must implement standard

service request security by mapping service request types to the responsibilities for each module. If you do not, all service request types are available in the different modules.

See Setting Up Service Request and Case Security, page 10-1.

> **Note:** Many fields, including Severity and Urgency, are not mapped to service request types and are the same across all the application modules.

Modifying Notes

By default, users cannot update notes created in Customer Support, Service Desk, and Case Management. Notes cannot be edited by any user, including the note author.

You can modify notes with the appropriate responsibility by adding functions to the default Notes Security submenu for that responsibility:

- Internal Menu Name: CSZ_SR_T2_AGENT_NOTES_GRANT
- Menu User Name: Customer Support Tier 2 Agent Notes Security Menu

You must add the following three functions:

- JTF_NOTE_UPDATE_NOTES
- JTF_NOTE_UPDATE_NOTE_DETAILS
- JTF_NOTE_UPDATE_SECONDARY

If you make notes editable by adding these functions, you must be aware that:

- Changes are not audited.

  This means that there is absolutely no indication that a note has been updated, who updated it, or when it was updated.

- You cannot specify which notes a user can edit.

  If you make notes editable, a user can update any existing note, including those created by other users and customers as well as notes created within other applications accessible through the user's responsibility.

Viewing Audit History

You can view the audit report for the service request from the Update Service Request page. Use the Audit History page to view the history of changes to the service request attributes you select in the Audit Report.

The service request audit report displays the following information:

- Service request attribute name
- Date of change
- Name of the application user name who made the change. If the service request attribute is not changed, the attribute is not displayed.
- Name of the resource who made the change
- The original value of the service request attribute
- The new changed value of the service request attribute
- Any other additional information required by the agents

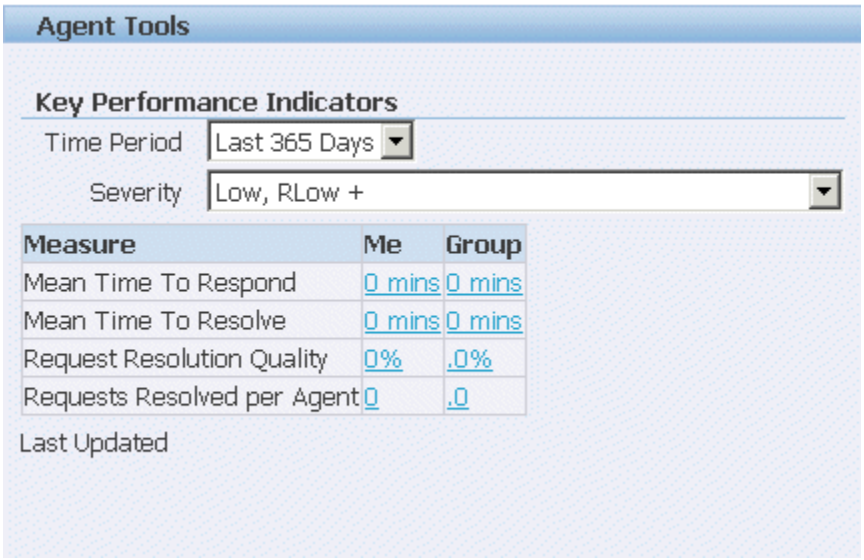
Agents can write comments and add reasons why the change was made for each service request attribute.

Understanding Key Performance Indicators

This topic describes the functionality and setup steps for the Key Performance Indicator region in the Agent Dashboard.

Statistics About Personal and Group Performance

Agents can view statistics about their personal and group's response to customer service requests in the Key Performance Indicator region of the Agent Dashboard (shown in the image below).



Key performance indicators include the following measures of agent and group

performance:

- Mean Time to Respond

  The average time it takes to respond to a service request from the time the service request is entered.

- Mean Time to Resolve

  The average time it takes to close the service request from the time it is entered. (Closing a service request means setting it at a status classified as final.)

- Request Resolution Quality

  The percentage of service requests that are not reopened by customers. (This percentage is the opposite of the reopen rate, the percentage of service requests that are reopened by customers.)

- Requests Resolved per Agent

  The number of service requests set to a final (closed) status.

The data in the Key Performance Indicators are refreshed by a concurrent program and stored in materialized views.

By default, group performance is calculated based on the groups the agent belongs to. You can restrict the calculations by specifying a single group in a system profile.

Key Performance Indicator Filters

Agents can filter the data by length of time and severity.

By making a selection from the Period of Time list, agents can choose to display the statistics for:

- Today
- Last 7 Days
- Last 30 Days
- Last 90 Days
- Last 365 Days

Agents can use the Severity list to filter the service requests by severity. The filtering choices depend on the severities you have set up and their importance level. (See Setting Up Service Request Severities, page 7-19.) For example:

- Severity <highest importance> Only
- Severity <2nd highest> and Higher

- Severity <3rd highest> and Higher
- Severity <4th highest> and Higher

Agent Productivity Details

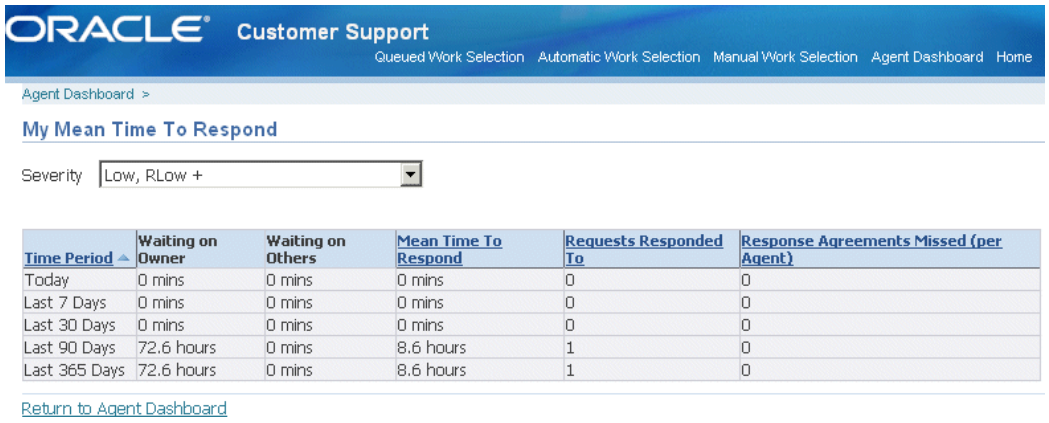
Between the time it is logged to the time it is resolved, a service request can have multiple owners and multiple periods when it is waiting on customers or other individuals.

Because the key performance indicators summaries displayed on the dashboard base their calculations on the on the total time from entry to resolution, they provide performance measures from the customer's rather than the agent's point of view.

For example, the key performance indicators statistics for Agent A are calculated based on the six day service request resolution time even though Agent A resolved it in one day. The service request spent four days waiting on response from the customer and one day with Agent B who could not resolve the issue.

Agents can get an indication of their personal and group performance by drilling down to view the key performance details.

These show the amount of time service requests spent waiting on the owner (the agent) and on others. The following image shows the details for the response time on service requests:



Setting Up Key Performance Indicators

Use the following procedure to set up key performance indicators on the Agent Dashboard.

Prerequisites:

You must classify service request statuses with the predefined status classifications:

- Waiting on Customer

- Waiting on Support
- Waiting on Internal Group
- Waiting on External Group

For details, see Setting Up Service Request Statuses, page 7-8.

To set up key performance indicators:

1. Optionally, set the system profile CSY: Service Request Group Filter, to the group you wish to use in the group key performance indicator calculations. By default, this system profile is set to All.
2. Under the Service responsibility, navigate to Others, and select Submit Requests.
3. In the Submit a New Request dialog box, choose **Request Set**.
4. Run the KPI Summary: Initial Data Load Set concurrent program. You only need to run this program once in any implementation.
5. Schedule the KPI Summary: Incremental Data Load Set concurrent program to run frequently to synchronize the materialized views with your application data.

Setting Up Jeopardy for Service Requests

The application considers service requests with expected response or resolution dates past the current date as in jeopardy and displays them in red on the Agent Dashboard.

You can also use jeopardy as one of the search criteria on the Advanced Search page. For example, you can search for all the service requests you own that are in jeopardy. (By default, you must add the Jeopardy search parameter using the Add Attribute ist.)

You can extend the range of service requests that are considered by the application as in jeopardy by making entries in the system profiles Service: Jeopardy: Response Date Buffer and Service: Jeopardy: Resolution Date Buffer.

For example, if you set Service: Jeopardy: Resolution Date Buffer to 2 and today is August 4, any service request with an expected resolution date of August 6 or earlier is considered in jeopardy by the application.

On the Agent Dashboard, the application displays any dates in jeopardy by this extended definition in blue.

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Capturing Additional Service Request Information with Extensible Attributes

This chapter covers the following topics:

- Extensible Attribute Overview
- Extensible Attribute Basic Concepts
- Setting Up Service Request Extensible Attributes
- Setting Up Value Sets
- Setting Up Attributes and Attribute Groups
- Specifying the Service Request Types Where Attributes Appear
- Creating Regions (Pages) to Display Attributes
- Service Request Extensible Attributes
- Creating Custom Functions for Attributes
- Example of How Extensible Attributes Are Used in Practice

Extensible Attribute Overview

Extensible attributes permit you to capture additional information in service requests and cases. They are available in the Customer Support, Service Desk, and Case Management modules of Oracle TeleService.

> **Note:** To capture additional information in service requests created in the Contact Center, you must use a different and incompatible architecture. See Capturing Additional Service Request Attributes in the Contact Center, page 40-1.

Extensible attributes, also called user defined attributes, improve on the existing descriptive flexfield architecture on which they are built in the following ways:

- You can capture an unlimited number of additional attributes. (The number of descriptive flexfields is fixed.)
- Extensible attributes permit multirow entries making it possible for agents to enter multiple items on the same service request. (Descriptive flexfields permit only a single row.)
- You can capture global attributes (visible in all service requests) as well as attributes specific to a service request type.

> **Note:** Extensible attributes do not display in Oracle iSupport. If you require customers to enter or view the additional information via Oracle iSupport, then you must use descriptive flexfields or the alternate architecture available in the Contact Center.

Extensible Attribute Basic Concepts

Before you start creating extensible attributes, you must be familiar with a few concepts used in the user interface:

- Value Sets
- Attributes
- Attribute Groups
- Pages

Value Sets

Value sets specify the list of values or list agents use to make their entries. Using value sets ensures agents enter only valid data.

You can enter the values for a value set directly in the interface, or generate the list from a database table with a PL/SQL query.

In addition, you can use a value set to specify the maximum number of characters the attribute can capture. The maximum is 150 and the default is 30 characters.

> **Note:** To capture large amounts of text, use service request notes instead.

Value sets also have an alternate use. Instead of providing a list of values, you can use a value set to restrict the range of permissible values. For example, you can specify that agents can enter only numbers between 1 and 10 for the number of abandoned cars. The agents enter the number manually, rather than from a list, but receive an error message

for entries outside that range.

Attributes and Attribute Groups

An attribute is the field that captures additional piece of information.

You can specify the attribute to be rendered in different ways on the user interface. It can appear as a text box, a group of option a list (called "poplist" in the user interface), a list of values, or a check box, depending on the information you wish to capture.

If agents are making an entry from a list, then you must specify the value set to be used to make the entry.

You must create an attribute as part of an attribute group.

You specify an attribute group to be multirow to enable agents to enter information about multiple items into the service request. For example, by creating a multirow attribute group for discarded furniture, agents can enter information on multiple pieces of furniture to be picked up on the same service request.

You can specify if the attributes in the attribute group are going to appear globally in all service requests or only in service requests of specific request types by mapping the group either to all service request types or to one or more individual service request types.

Pages

You specify how the attributes appear in the service request by creating different regions, called pages. Each page provides the heading under which the groups of attributes are displayed. You can display multiple attribute groups in one page. If you create multiple pages, you can specify the order in which they appear in the service request.

Where Extensible Attributes Are Displayed

Extensible attributes appear both in the Service Request page and the Advanced Search Page.

Service Request Page

Extensible attributes are displayed in the Service Request page below the Issues region.

Global attributes, those available for all service request types, are displayed first, followed by attributes mapped to the specific service request type.

The pages and the attribute groups provide headings that organize the attributes on the page. The image below highlights some of these by number:

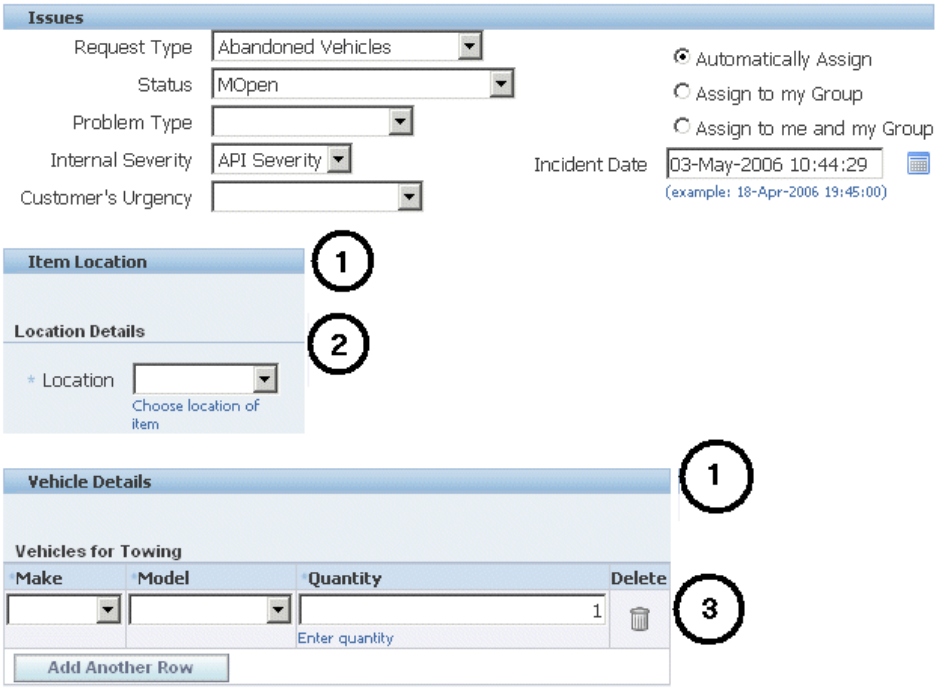
1. Region headings, such as "Item Location" and "Vehicle Details", come from the entries you make during page setup (the Display Name field for the page).

2. Attribute group headings, such as "Location Details", come from the attribute group (the Display Name field for the attribute group).

   You can choose to omit this level of heading on the page by making the wording of the attribute group heading identical to the page heading during setup.

   Asterisks mark attributes you have designated as required.

3. You can set up attributes of different kinds. This is an example of a multirow attribute group. All attributes in the attribute group appear in one row. To add additional rows, agents click on the Add Another Row button which is rendered automatically.



Advanced Search Page

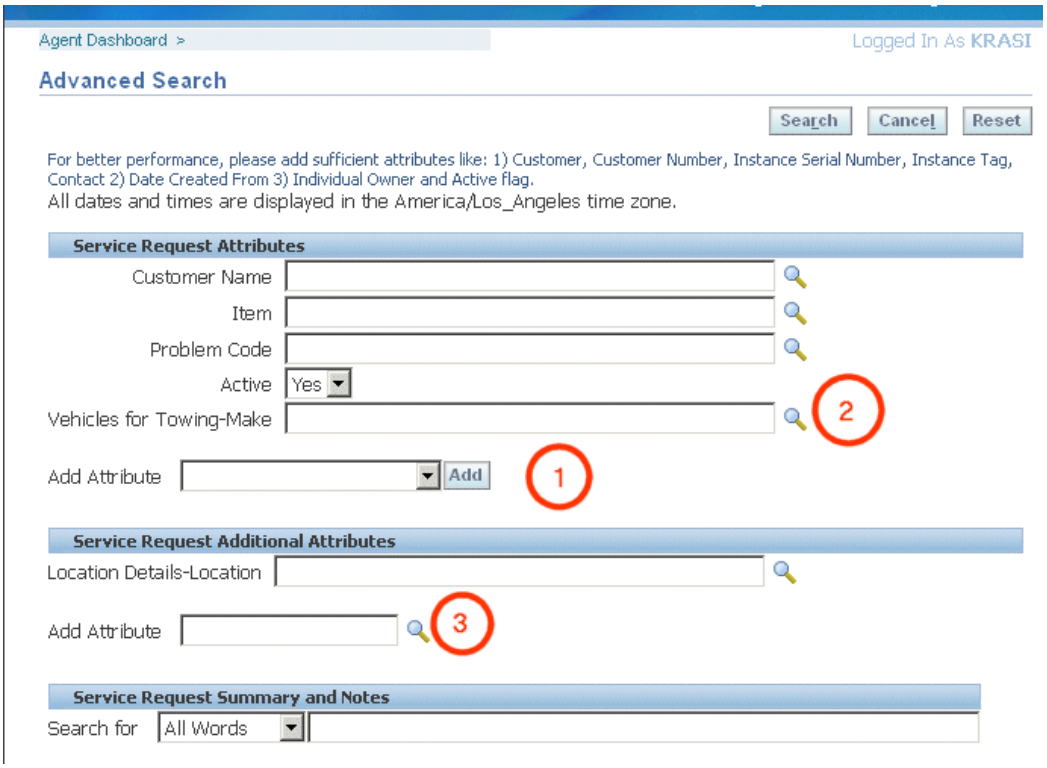
Agents can also use the extensible attributes in advanced searches available from the Dashboard page.

Agents can add any indexed attributes you have created as search criteria by using the Add Attributes list in the Service Request Attributes region (see item identified by number 1 in the Advanced Search page image below).

The attribute displays with its attribute group display name hyphenated in front (2), for example: "Vehicles for Towing- Make".

Agents can add any nonindexed attributes they want for searching in the Service Request Additional Attributes region below (3), for example: "Location Details -

Location".



Number of Supported Attributes

Each service attribute group can have as many as 125 attributes:

- 50 character attributes
- 25 number attributes
- 25 date attributes
- 25 unit of measure attributes

By creating additional attributes groups, the application effectively gives you the ability to capture an unlimited number of additional service request information.

Personalization

You cannot use the personalization feature of the Oracle Applications Framework to move or modify individual attribute regions, headings, or fields. You must use the extensible attributes architecture to do so.

The only permitted personalization is moving or hiding the region where extensible attributes are displayed.

Extensible Attribute Architecture

The capture of additional service request attributes is based on the user defined attribute architecture developed for Oracle Product Hub.

You can obtain additional details about using this architecture by referring to the Attributes and Functions chapter of the *Oracle Product Hub User's Guide* and the *Oracle Product Hub Implementation Guide.*

Oracle TeleService supports all features of the architecture except for attribute security. The data security for extensible attributes is the same as for all other service request information: Any user who has access to the service request can also access the information entered in the additional attributes.

Oracle TeleService extends the architecture by mapping functions between attribute groups and service request types. Information on this feature is covered by this guide exclusively.

Extensible Attributes for Customers and Associated Parties

You can use the same extensible attribute architecture to capture additional information for database objects other than service requests.

If you are using Case Management, you can use extensible attributes to capture information about the parties associated with a case. For example, an investigative agency may want to capture the height, hair color, and eye color of suspects in a case. The setup of attributes for associated parties is very similar but not identical to the setup of service request attributes. (See Setting Up Associated Party Extensible Attributes, page 50-12.)

The Trading Community Architecture customer model also uses the same extensible attribute architecture. This means that you can capture additional attributes with customer data. This way the information is visible across all Oracle E-Business Suite applications rather than just in Oracle TeleService.

A social services agency may want to capture details about the past criminal history of its clients with the client record, for example. A retailer may want to capture the garment sizes and color preferences for customers to aid in marketing efforts.

Setting Up Service Request Extensible Attributes

Use this overview to guide you through the process of setting up the capture of additional information for service requests. Follow the references in each step for a general procedure and an example.

To capture additional service request information using extensible attributes:

1. If agents are using lists of values or lists to make their entries, then create the value sets.
   - For a general procedure, see Setting Up Value Sets, page 45-7.
   - For a simple example, see Example of Value Set Setup for Item Location, page 45-18.
2. Create the attributes as part of an attribute group.
   - For a general procedure, see Setting Up Attributes and Attribute Groups, page 45-9.
   - For an example, see Example of Attribute Group Setup for Item Location, page 45-19.
3. Specify the attribute groups that you want to display globally or map them to specific request types where you want them to appear.
   - For a general procedure, see Specifying the Service Request Types Where Attributes Appear, page 45-14.
   - For an example, see Example of Mapping Attribute Group to Service Request Types, page 45-22.
4. Optionally, create custom functions to perform calculation based on agent entries, for example, calculating the total number of items entered into the service request. See Creating Custom Functions for Attributes, page 45-17.
5. Create the regions where the attributes are displayed in the Service Request page.
   - For a general procedure, see Creating the Regions Where the Attributes Are Displayed, page 45-15.
   - For an example, see Example of Page Setup to Display an Attribute Group, page 45-23.

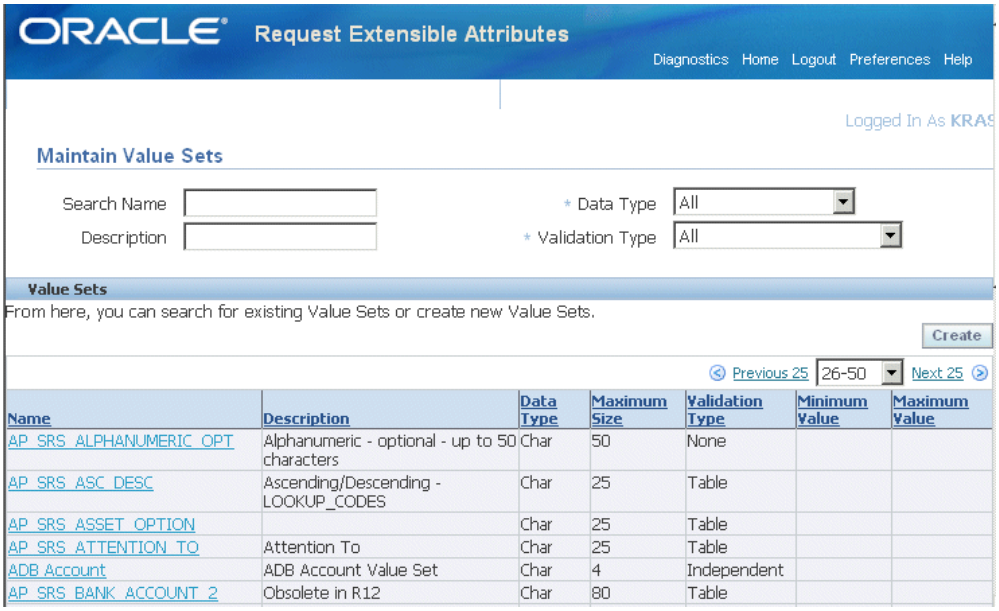
Setting Up Value Sets

Use this procedure to set up lists of values that users use to enter data in an attribute.

To set up value sets:

1. Navigate to Setup, then Definitions, then Request Extensible Attributes, and select Value Sets.

   The Maintain Value Sets page appears.



2. Click **Create**.

   The Create Value Set page appears.

3. Enter a unique name and an optional description. Users do not see either of these entries.

4. If the extensible attribute entries are going to be numbers:

   1. Choose Number from the Data Type list.

   2. Enter the maximum field size of up to 150 characters in the Maximum Size field. The default is 30 characters.

   3. Optionally enter a range for valid values.

5. If the information to be captured is a date, then:

   1. Select **Standard Date** or **Standard Date Time** from the Data Type list. This selection captures time information as well.

   2. Optionally, enter a range for valid dates. You can use `$SYSDATE$` to represent the current date and time.

6. If the information to be entered is a character string, then:

    1. Select **Char** from the Data Type list.

    2. Enter the maximum field size of up to 150 characters in the Maximum Size field. The default is 30 characters.

7. Choose the validation type:

    - To have agents make the entry in the field manually, choose **None**.

    - If agents are going to be choosing from a list or a list of values and you plan to enter the values for the list manually, then choose **Translatable Independent**.

    - If the list of values is generated dynamically from a database table, for example, if the attribute is dependent on another attribute, then select **Table**. See Example of Dependent Attribute Setup, page 45-27.

      You must enter a PL/SQL query for the table from which you want to generate the list. You must be familiar with the application table structure and know PL/SQL before using this option.

8. If agents are selecting from a list, then specify if that list is to be a list, by choosing the Pop-list option, or a list of values.

9. Click **Update**.

10. If the list is not generated from a table, then you must create the list value manually by clicking **Create** in the Values region.

    You can order the values in the list using the Sequence field. To add additional entries, click **Add Another**.

    If you have chosen Translatable Independent, then agents see the descriptions you enter in the translated value for the language you are logged in.

Setting Up Attributes and Attribute Groups

Use this procedure to create the extended attribute fields that capture the additional service request information. You create extended attributes as part of an attribute group. Attribute groups organize attributes under a heading on the Service Request page. By mapping attribute groups to service request types, you specify where the attributes appear.

Prerequisites:

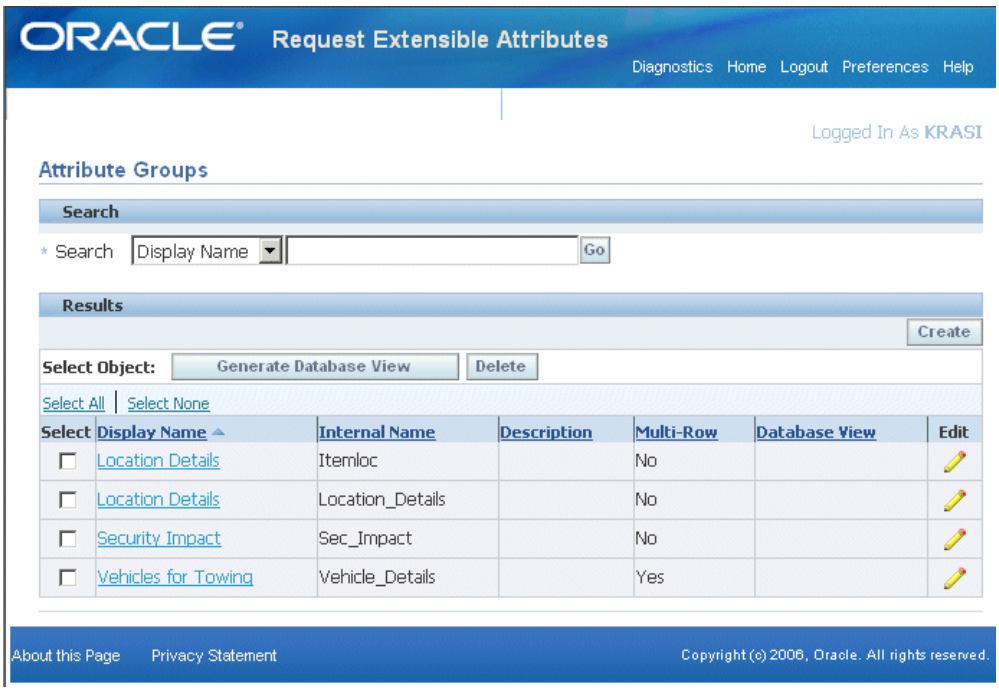
To enable agents to choose values from a list or to restrict entries to a range, set up a value set first. See Setting Up Value Sets, page 45-7.

To set up attributes and attribute groups:

1. Under the Service responsibility, navigate to Setup, then Definitions, then Request Extensible Attributes, and select Attribute Groups and Attributes.

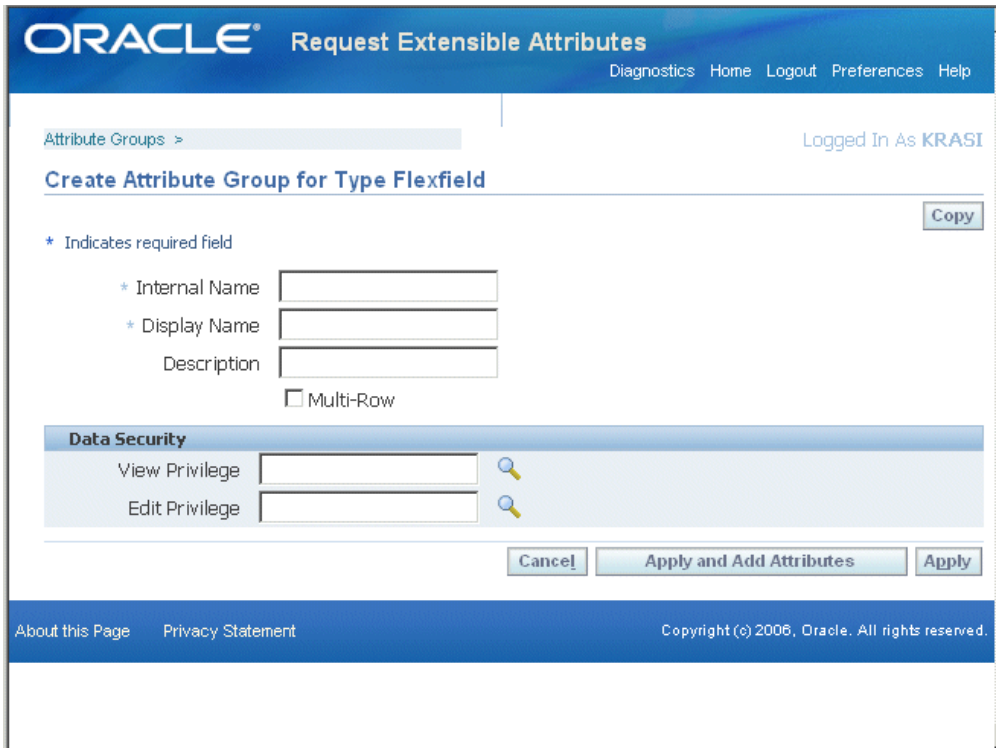
   Note: If you want to create attributes for associated parties, you must instead navigate to Setup, then Definitions, and select Associated Parties for Case Management, Party Roles Extensible Attributes, Attribute Groups And Attributes.

   The Attribute Groups page appears.



2. Click **Create**.

   The Create Attribute Group for Type Flexfield page appears.



3. Enter an internal name and a display name. The display name is the title the agent view above the groups of attributes.

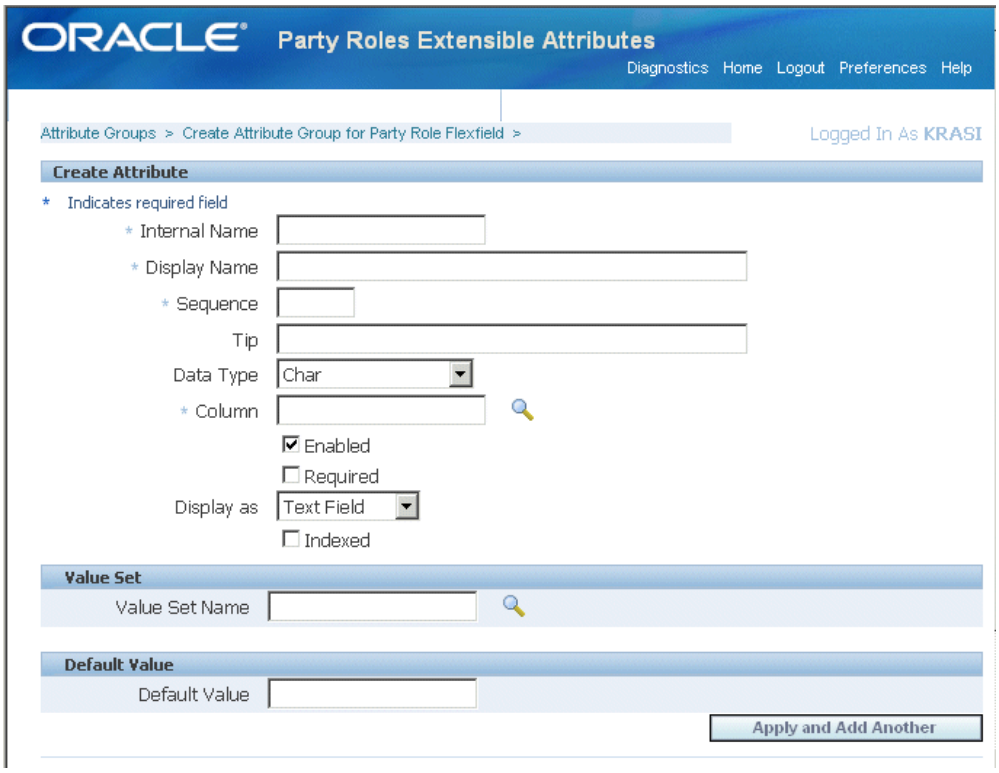
   Note: If you do not want to have two separate headings for the page and for the attribute group, then make sure the Display Name entry is the same for the attribute group as for the page.

4. To permit entry of multiple rows, select the Multi-Row check box. See Example of Multirow Setup, page 45-24.

   Note: Data security at the extensible attribute level is not supported. The data security for extensible attributes is the same as for all other service request information: Any user who has access to the service request can also access the information entered in the additional attributes.

5. Click **Apply and Add Attributes**.

   The Create Attribute page appears.



6. Enter a unique internal name and the display name. The display name is the field name the user views.

7. Specify the order in which the attribute appears by entering a number in the Sequence field.

8. Choose a data type. If you have created a value set for use with this attribute, then the data type must be the same as that of the value set. The Translatable Text data type is not supported.

9. Enter "%" (the percent sign) in the Column field and click the List of Values icon. The application displays the available columns. Choose any column. After you use a column, it no longer appears on this list.

10. Make sure that **Enabled** is selected.

11. If entry in this field is required, then select **Required**. Required fields are indicated on the page with an asterisk.

12. Specify the appearance of the field by making a choice from the Display As list:

    The available values are determined by the data type you have specified:

    - **Checkbox**: Displays a check box. If this is deselected, it stores the value of N.

Selecting the check box stores a value of Y. If you enter Y in the default field, the check box is selected by default.

- **Dynamic URL**: You can use this method to display a URL with service request parameters, such as the incident location, which the agents can use to access Internet services, to obtain a map of the area, for example.

  To use this feature you must add parameters, such as `street=$StreetName$&postalcode=$ZipCode$`, to the Dynamic URL field.

  However, agents can only click on this URL in the read only service request page. In the service request creation and update pages, the URL displays in an entry field, so agents must copy and paste it into a separate browser window. For this reason, this display method is of limited use for service applications.

- **Hidden**: Choosing this value does not display the attribute in the user interface. Use this selection to store a value of a function, for example.

- **Radio Group**: Displays a group of options corresponding to the values in the value set you specify. You must specify a value set with discrete set of values that you have entered.

- **Static URL:** This method displays a URL in the Service Request page, but agents can only click on it in the read only Service Request page (displayed only for agents who do not have update access). In the service request creation and update pages, the URL displays in an entry field, so agents must copy and paste it into a separate browser window. For this reason, this display method is of limited use for service applications.

- **Text Area**: Displays a bigger text area. You are still limited to the 150 character maximum.

- **Text Field**: Displays a text field. If you specify a value set, then the field displays with a list or a list of values indicator.

13. Selecting the Indexed check box indexes the field in the database for faster searching. If selected, the attribute appears among the most frequently used attributes at the top of the Advanced Search page. For an example of how this page displays for agents, see Advanced Search Page, page 45-4.

    Note: Limit the number of indexed attributes to only those fields frequently used for searching. Adding indexed fields affects your database performance.

14. If you have created a value set for this attribute, then enter it in the Value Set Name

field.

15. Optionally, enter the Default Value.

16. If you are making this service request attribute group to be multirow, then each row agents enter must be unique. You must specify the attributes that specifies unique entries:

    1. Click **Maintain Unique Key** in the Attribute Group Details page.

    2. Use the arrow buttons to specify the attributes by moving them from the Attributes column to the Unique Key Attributes column.

    3. Click **Apply** when you are done.

Specifying the Service Request Types Where Attributes Appear

Map the attribute groups to either all service request types or to a specific service request type for the attributes to be visible to the user. You can map the same attribute group to multiple service request types.

Prerequisites:

You must create the attributes and attribute groups. See Setting Up Attributes and Attribute Groups, page 45-9.

To associate attribute groups to service request types:

1. Under the Service responsibility, navigate to Setup, then Definitions, then Request Extensible Attributes, and select Associate Attribute Groups.

   The Associate Attribute Groups page appears.

2. Choose the service request type or All Request Types from the Classification list.

   Mapping attribute groups to All Request Types makes them visible in all service requests regardless of service request type.

3. Click **Add Attribute Groups**.

   The Add Attribute Groups to Classification page appears listing all of the attribute groups.

4. Use the Search field to narrow down the list, if necessary.

5. Select the attribute groups you want to add and click **Apply**.

Creating Regions (Pages) to Display Attributes

Use this procedure to create the region where the attributes are displayed. The setup user interface uses the term "page" instead of region.

If you are exposing attributes from multiple attribute groups in a service request type, you can choose to display the attributes under one heading by creating just one region (page) or you can create multiple regions so the attributes appear with their own headings.

For example, you create two attribute groups: one to capture information about a driver and the other to capture information about the vehicle they are driving. You can display both the attribute groups in one region under one heading, "Car and Driver" or display them in two separate regions under separate headings "Car" and "Driver".

Prerequisites:

- Create attribute groups and attributes
- Map attribute groups to the service request types.

To associate attribute groups to service request types:

1. Under the Service responsibility, navigate to Setup, then Definitions, then Request Extensible Attributes, and select Page Associations.

   The Service Request Extension Pages page appears.

2. If you are creating pages for attribute groups that are visible globally, then choose **All Request Types** from the Classification list. Otherwise, choose the service request type where the attributes are to be displayed.

3. Click **Create Page**.

4. The Create Extension Page page appears.

5. Enter a text for the heading for the region in the Display Name field.

   Note: If you make the wording exactly the same as the display name for the attribute group, the application displays only the page heading.

6. Enter a unique internal name. Agents do not see this name.

7. Enter a sequence number. If you are displaying attributes in multiple regions, the sequence number determines the order in which the regions are displayed in the service request user interface.

8. Click **Add Another Row**.

9. Use the list of values to enter the attribute groups you want to add to this page. Your entry in the Sequence field determines the sequence in which the attribute groups display on the page.

   Note: The list of attribute groups is filtered by the mapping you have created previously.

Service Request Extensible Attributes

You can create and display the extensible attributes for a service request.

This page displays the following details:

- The Extensible Attributes Header region displays the following key service request attributes in read only mode:
- **Service Request Number** - A unique system generated number assigned to the service request.
- **Type** - The request type for the service request. The type affects the assignment of this service request to other agents for resolution, and determines who can view and update the service request.
- **Status** - Displays the status signifying where the service request is in its progress towards resolution.
- **Incident Date** - The date when the incident took place.
- **Creation Date** - The date when the service request is created.
- **Last Update Date** - The date when the service request was last modified.
- **Customer Name** - The name of the customer who logged the service request.
- **Customer Number** - The number assigned to the customer.
- **Account Number** - The account number of the customer.
- **Item** - The Oracle Install Base item for which the service request is logged.
- **Item Instance** - The Oracle Instald Base instance.

The extensible attributes that are defined for the selected service request type are displayed in the Global region.

You can update these attributes, but if the service request is in Closed status or the Disallow Update check box is selected for the service request status, these attributes are displayed in the read only mode.

Creating Custom Functions for Attributes

You can create custom functions for making calculations based on entries in attributes. For example, you can add a Calculate Total button that sums the entries in a multiple row field and stores the result in another attribute.

A function can be a Java method or a PL/SQL function. An application administrator must first implement the function either in the database, if it is PL/SQL stored procedure, or for Java functions, the function can be created and saved in a directory that is part of the Java classpath.

The Create Function page is available under the Service responsibility by navigating to Setup, Definitions, Request Extensible Attributes, Functions.

The button or URL that triggers the function is called an action. You create an action after you have mapped the attribute groups to service request types. Navigate to Setup, then Definitions, then Request Extensible Attributes, and select Attribute Group Associations and click **Update Actions**.

For more information, see the Implementing User Defined Functions section in the *Oracle Product Hub Implementation Guide* and the Creating User Defined Functions section in the *Oracle Product Hub User's Guide.*

Example of How Extensible Attributes Are Used in Practice

This section explains how a city government agency responsible for disposing of solid waste, including the towing of abandoned vehicles, can use extensible attributes to capture additional information it needs about the vehicle to be picked up.

In addition to the address, the agency must know the location of the items to be picked up. They can be on the street, in a drive way, or on the sidewalk.

Because this information must be captured for all items, the agency creates a global extensible attribute. See Example of Global Extensible Attribute Setup, page 45-18.

For Abandoned Vehicles, the agency must know the vehicle's make, model, and color, information that determines the type of tow truck it must send.

Because this information must be captured for vehicles, but not for furniture, or appliances, the agency sets this attribute to display only for the Abandoned Vehicles service request type.

In addition, the agency must make the list of values for the model dependent on the entry the agent makes for the car model. This way agents see just the models relevant to the make they have entered. This setup is discussed in Example of Dependent Attribute Setup, page 45-27.

Because the agency may have to pick up more than one vehicle at a single address, it must set up the vehicles to capture multiple rows. See Example of Multiple Row Setup, page 45-24.

Example of Global Extensible Attribute Setup

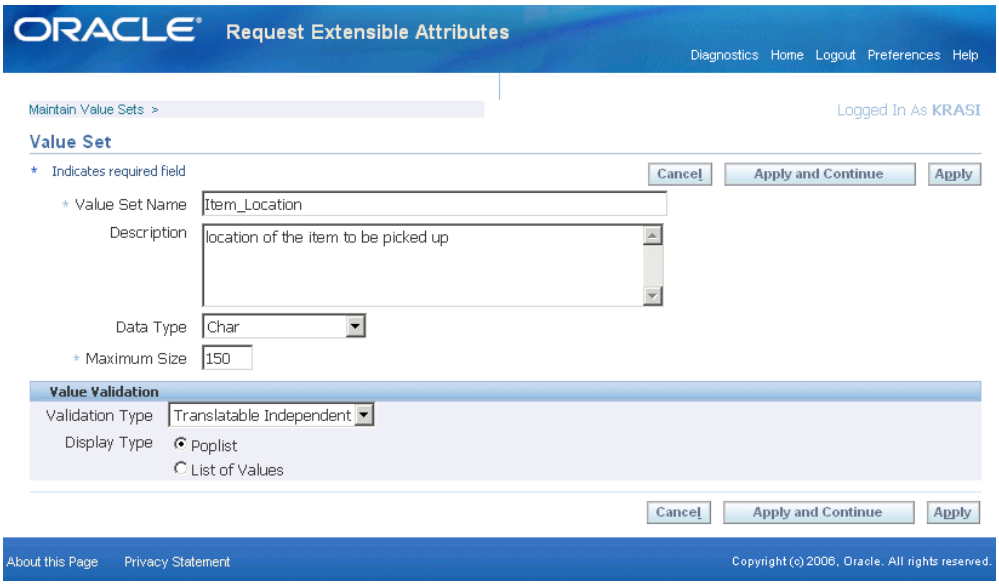
An agency wants to capture the location of items to be picked up. As this information must be captured for all service requests, the agency sets up a global attribute.

Example of Value Set Setup for Item Location

The agency wants to enter the location of the items to be picked up using a list of values to ensure standard locations for reporting:

1. On the Create Value Set page, enter the following:
   - **Value Set Name**: ITEM_LOCATION
   - **Validation Type**: Translatable Independent

     This validation type makes it possible for you to display each value in the list how you want the agent to see it.
   - **Display Type**: List

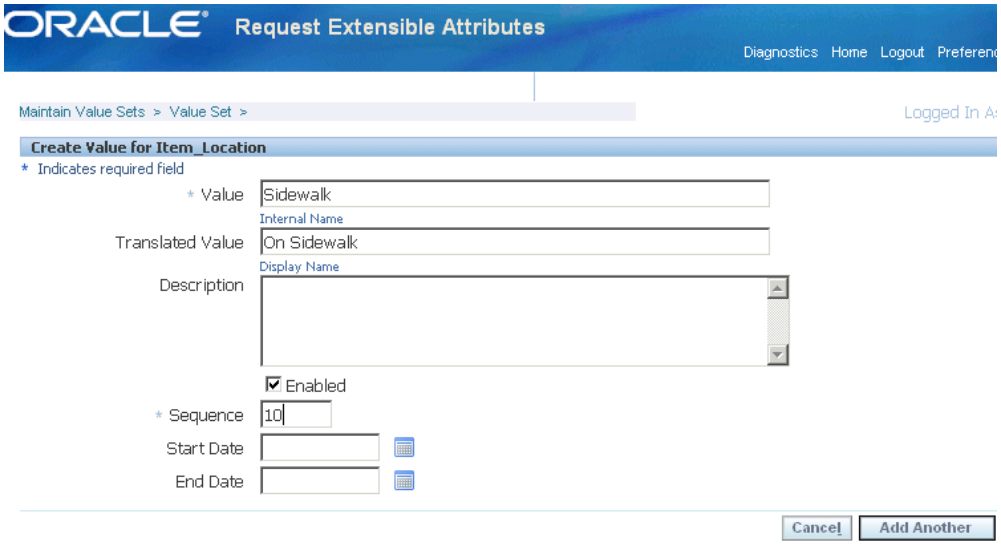


2. Click **Apply and Continue**, and enter the values one by one:
   - On sidewalk
   - In drive way

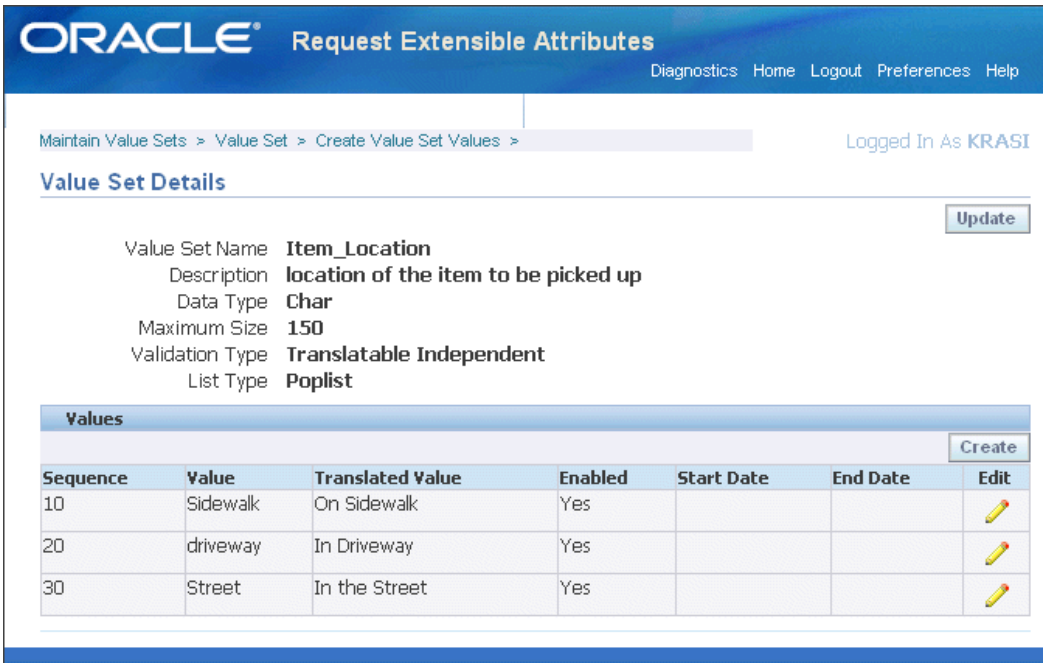
- In the street

Note that the Translated Value field is where you enter the text the agent see.

The image below provides an example of one of the values:



Here is what the final value set looks like:



Example of Attribute Group Setup for Item Location

The following is an example of how you can set up a simple attribute to capture

additional details on item location.

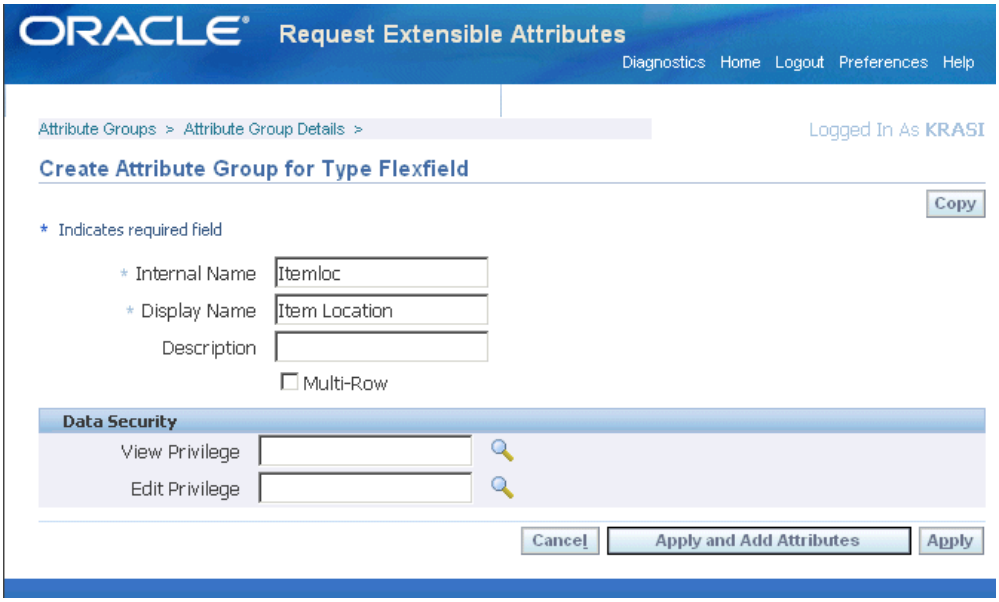
Example of Item Location attribute group setup:

1. On the Create Attribute Group for Type Flexfield page, enter the following:

   - **Internal Name**: Itemloc
   - **Display Name**: Item Location

     This provides the heading agents see for the attribute group in the service request.

   The following screen image shows the setup:



2. Create the attribute.

   There is only one attribute to create for this attribute group: a text field where agents make an entry by using a list from the value set Item_Location.

   Enter the following details:

   - **Internal Name**: Location
   - **Display Name**: Location

     This is the name that appears as the label for the list.

   - **Sequence**: 10

     The number you enter here is unimportant as there is only one attribute in this attribute group.

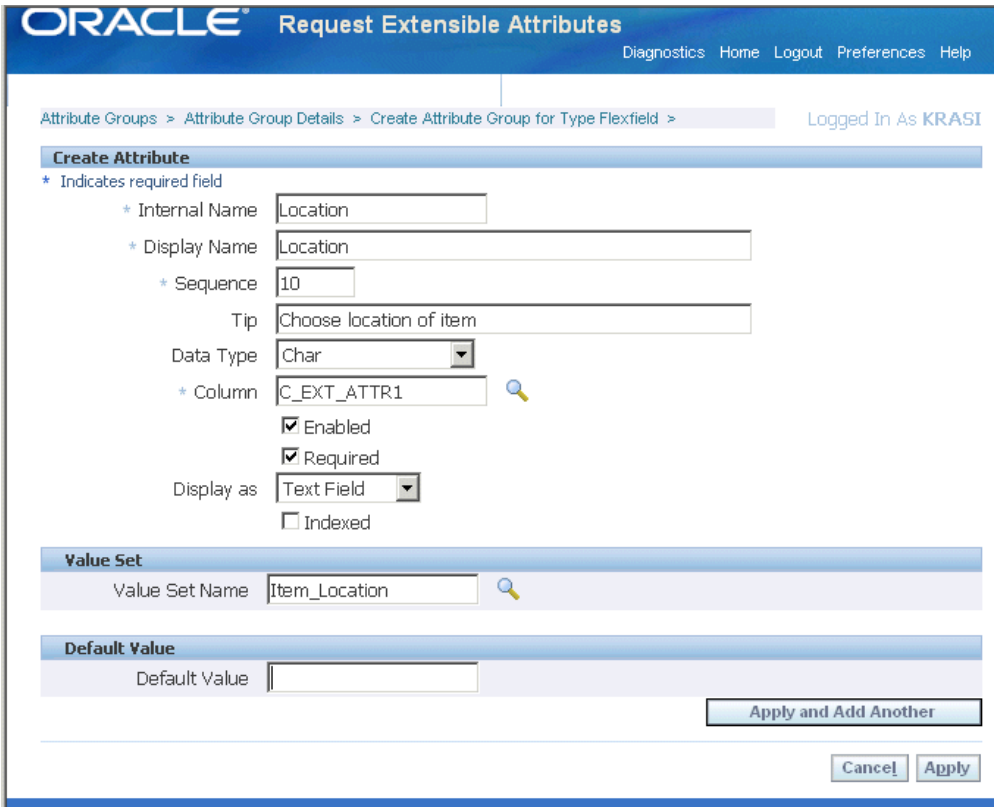
- **Tip**: <Enter an optional tip text here. The formatting is constrained by the length of the field itself. If the tip is long, it wraps to fit the width of the field.>
- **Data Type**: Char
- **Column**: Choose any available column.
- **Enabled** check box: Selected
- **Required** check box: Selected

  You want to require agents to choose a location.
- **Display as**: Text Field
- **Indexed** check box: Deselected

  You do not need to index this field as agents do not use it for searching.
- **Value Set Name**: Itemloc

  This is the internal name of the value set you created.

The image below shows the entries:



Example of Mapping Attribute Group to Service Request Types

As you want to capture the location in all request types, you must map the attribute group to all request types.

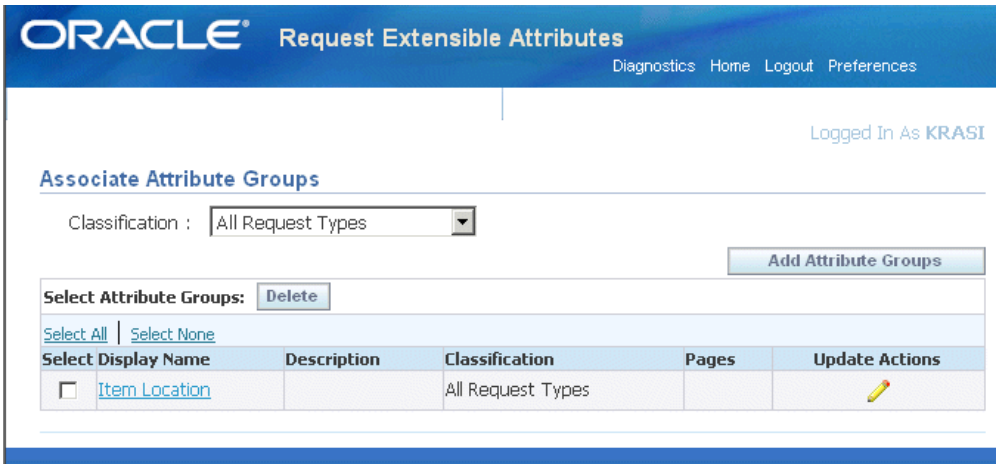
Mapping an attribute group to make it global:

1. Navigate to Setup, then Definitions, then Request Extensible Attributes, and select Page Associations.

2. Select All Request Types from the Classification list.

3. Add the Item Location attribute group.

   The following image displays the completed mapping:

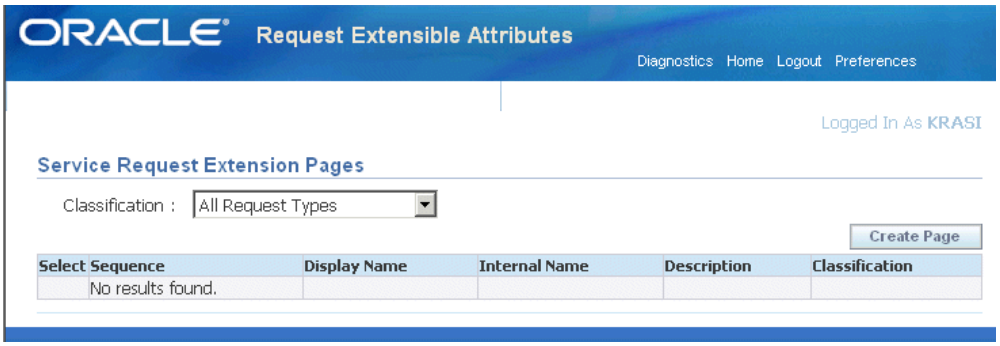


Example of Page Setup to Display an Attribute Group

You must create the region of the service request page where the attribute are displayed.

To create a page for the Item Location attribute group:

1. Navigate to Setup, then Definitions, then Request Extensible Attributes, and select Page Associations.



2. Click **Create Page** to display the Create Service Request Extension Page.

3. Enter the following:

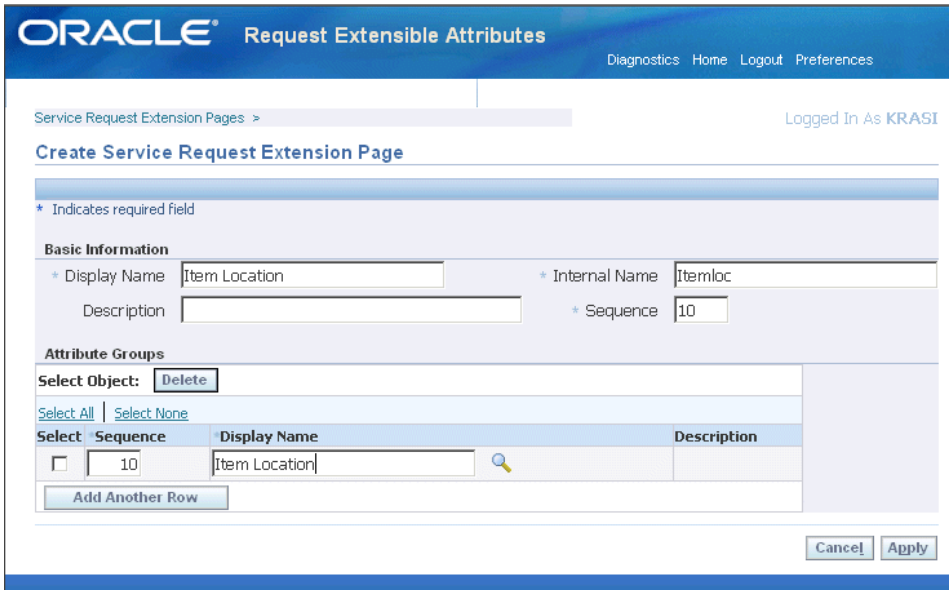
   - **Display Name**: Item Location

     The text you enter in this field appears as the region heading. If the text is exactly the same as the Display Name of the Attribute group including capitalization, then only one heading is displayed for this region instead of two.

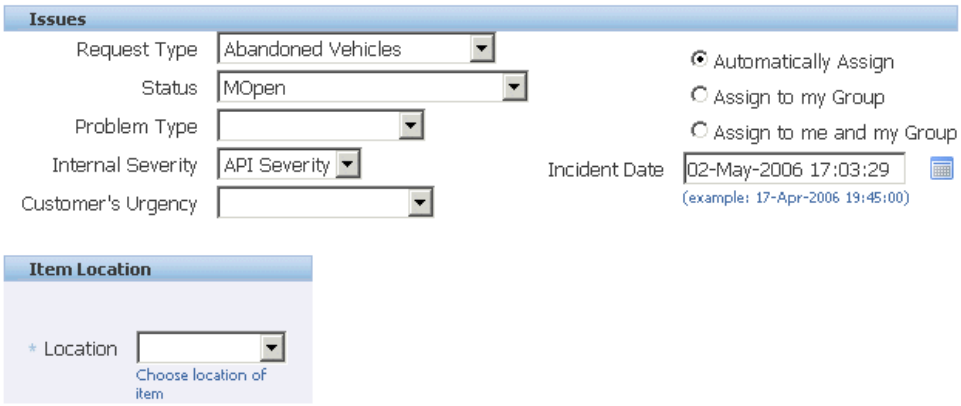
   - **Internal Name**: Item_Location

- **Sequence**: 10

  The number you enter here is unimportant as you are capturing the information from only one attribute group.



The resulting Item Location region appears in the Service Request just below the Issue region. (Note that, because the Page and Attribute Group display names are the same, the attribute heading does not appear):



Example of Multiple Row Attribute Setup

The agency may need to tow more than one vehicle from a given location at a time, hence, the Abandoned Vehicles attribute group must be made multiple row.

The application requires that each row agents enter must be unique. For example, an

agent cannot enter the two following identical rows:

Make	Model	Color
Ford	Taurus	White
Ford	Taurus	White

For this reason, you must create a third attribute, "No. Items", to cover the possibility that there are more than one car of the same make, model, and color. If multiple cars of the same make and models or two or more cars of unknown model and make must be towed, then the agent enters the number in this field.

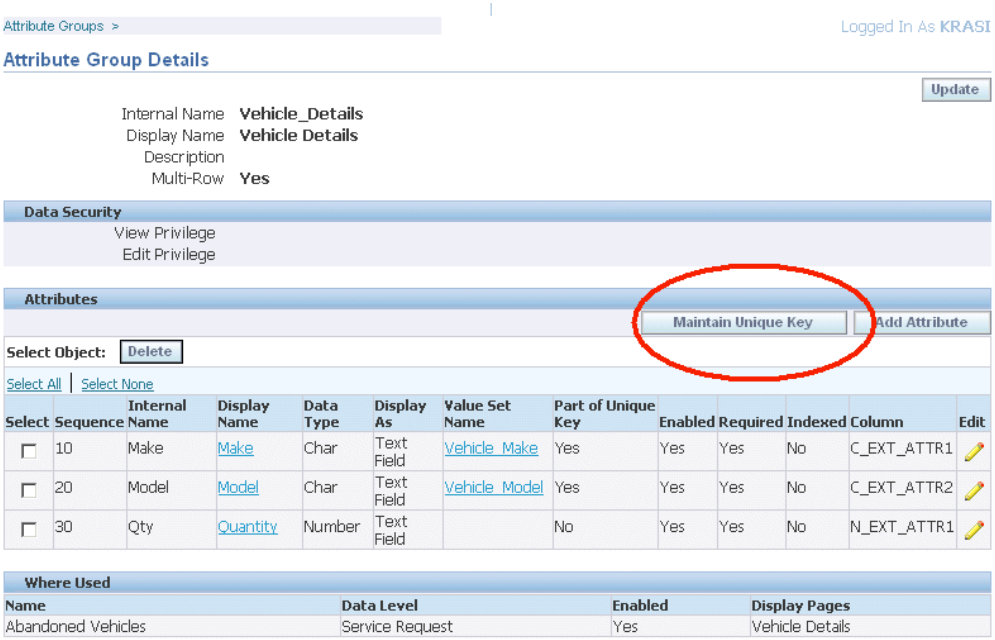
You can default "1" in this field, so that agents need not make an entry every time:

No. Items	Make	Model	Color
1	Ford	Taurus	White

To set up the multiple row entry:

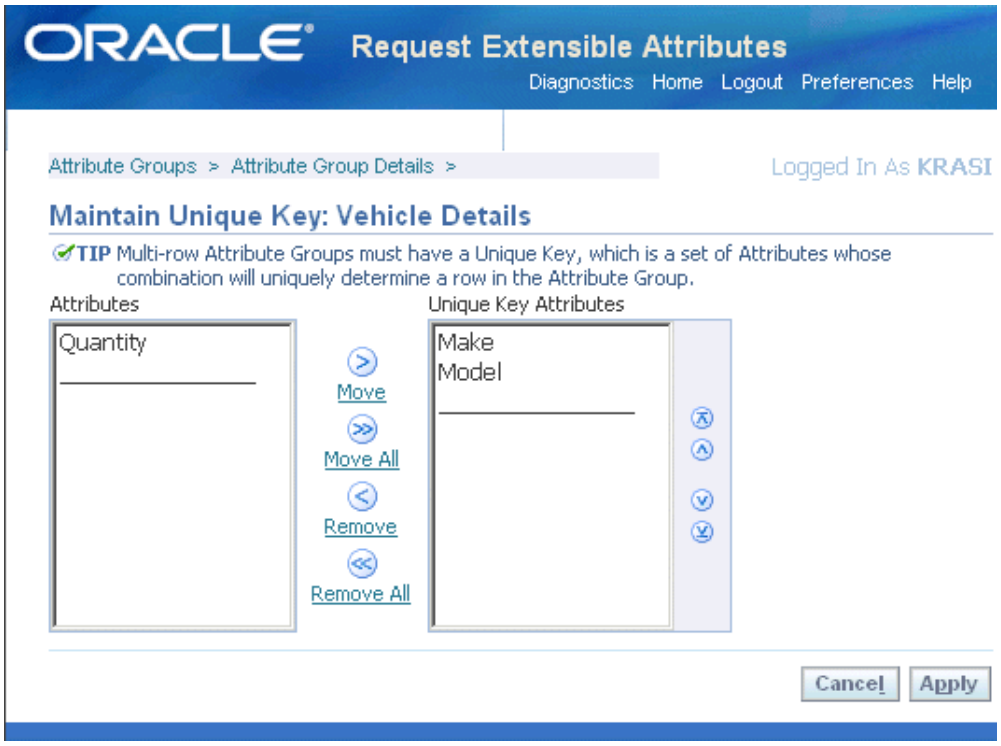
1. Create the three value sets: Make, Model, and Quantity.
2. Create the attribute group Vehicle_Details, and select the Multi-Row check box.

   The following image shows the attribute group setup.



3. Click the Maintain Unique Key button (highlighted in the image above) and specify which fields are used to guarantee unique entries.

   Move the attributes to the Unique Key Attributes column using the arrow keys. In this case, the unique key attributes are Make and Model (as displayed below).



Example of Dependent Attribute Setup

You can make the entry of one attribute, such as the model, dependent on the entry of another, the make of another vehicle.

To set up the entry of one attribute to be dependent on the value of another:

1. Create a database table that stores the relationships between the two attributes, the vehicle make and model. The database table VEHICLE_MODEL contains the following data:

Make	Model
Toyota	Tercel
Toyota	Camry
Honda	Civic
Toyota	Unknown

Make	Model
Honda	Accord
Honda	Unknown
Ford	Focus
Ford	Mustang
Ford	Unknown
Unknown	Unknown

The Unknown values permit agents to make an entry even if they don't know the make and model.

> **Note:** If you do not want to create new tables, you can add the data into the FND lookup table.

1. Define a value set Vehicle_Make_Values as a list with the following values:
   - Toyota
   - Honda
   - Ford
   - Unknown
2. Define an attribute group called Vehicle_Information.
3. To the attribute group Vehicle_Information, add the attribute Vehicle_Make (using the internal name Vehicle_Make) and set the value set to Vehicle_Make_Values.
4. Define the dependent values set Vehicle_Model_Values:

Field	Value
Name	Vehicle_Model_Values

Field	Value
List Type	List of Values
Validation Type	Table

For the Validation Table Information enter:

Field	Value
Table Name	VEHICLE_MODEL
Name (Value Column)	Model
Type (Value Column)	Char
Size (Value Column)	30
Where Clause	make=:$ATTRIBUTEGROUP$.Vehicle_Make

Note that you can add any number of conditions to the Where Clause and that " $ATTRIBUTEGROUP$" is a reserved word.

5. Add the attribute Vehicle_Model to the Vehicle_Information attribute group and set the value set to Vehicle_Model_Values. The sequence of this attribute must be larger than that of Vehicle_Make attribute.

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Capturing and Displaying Interactions and Activities

This chapter covers the following topics:

- Overview of Capturing and Displaying Interactions
- Setting Up Interactions

Overview of Capturing and Displaying Interactions

An interaction is a point of contact between a human or automated agent and a party such as a customer, a customer system, or a potential customer.

An interaction comprises all activities that take place between the time agents receive a call or start an interaction until they end the interaction or wrap up the call. An interaction can have multiple activities. Some activities, including service request updates, the creation of associated tasks, and the sending of e-mails, are automatically recorded by the application. Agents can view the past interactions with customers.

An activity describes the elements of an event that take place during an interaction. An activity includes an action (such as, creating or sending) and an activity type (such as, a service request or collateral). An interaction must have at least one activity.

Example

A customer calls an agent to request service. The agent creates a service request, sends a collateral, and updates the notes in the customer record.

The activities are:

- Creating a service request.
- Sending collateral.
- Updating a note.

When are Interactions Created

Interactions are created if any of the following actions take place:

- When a service request is saved, an interaction with the activity – "Service request created" is created.
- When a service request is updated for status changes, adding notes, problem code change, urgency change, or resolution code change, an interaction with the activity – "Service request updated" is created. These activities are created under the same interaction.
- When a link is created, updated, or deleted; when product or related information is added or updated; when a contact is added or updated; and when a contract is added or updated. In all of the above cases an interaction with the activity - "Service request updated" is created.
- When a task is created on a service request, an interaction with the activity – "A task is created" is created.
- If you perform any action on the service request after an interaction is closed, a new interaction with activities is created that are associated with the action.

However, the following actions do not create interactions or activities:

- Adding or deleting an attachment
- Adding or updating charge lines
- Invoking Oracle Scripting and saving scripts

Ending an Interaction

The actions that end an interaction are follows:

- Closing the Create Service Request page
- Clicking the Save, Cancel, or the Apply buttons.

Setting Up Interactions

Interactions are logged based on the settings in the profile option:

- Service: Interaction Logging Mode – You can enter any of the following values:
  - **Do not log Interactions** - If the profile is set to this value, then interactions and activities are not logged.

- **Log Interactions manually** - This profile value is currently not supported in HTML Customer Support. The behavior of this profile value is similar to the profile value Log interactions automatically. If the profile is set to this value, then interactions and activities are automatically logged.

- **Log Interactions automatically** - If the profile is set to this value, then interactions and activities are automatically created. The following interactions and activities are created:

Interaction	Activity
Service request is created	Service Request is Created
Service request is updated	Service Request is Updated
Task is created	A task is added
Task is updated	A task is updated

If the Service: Interaction Logging Mode profile option is either set to *Log Interactions manually* or *Log Interactions automatically*, then the interactions are captured with associated activities.

Interactions and activities are displayed in the Interactions tab but you can display the Interactions region on any other tab using Personalization.

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Enabling Universal Work Queue

About Universal Work Queue Integration with Oracle TeleService

Universal Work Queue integrates customer channels into E-Business Suite applications and makes it possible for agents working in Customer Support, IT Help Desk, and Case Management to accept work from different sources, that is assigned to them and their groups.

The HTML Universal Work Queue application is a central portal for agent work access. It dynamically displays media and application work nodes and summary items, and provides work access controls. From the work queue, agents browse through work sources, organize work summaries, select and open work items, view work item details, and act on selected work items. Agents use work access controls to request queued work or media contacts and to open selected work items or to get next work.

Implementing Universal Work Queue in Oracle TeleService

Agents using Customer Support, IT Help Desk, and Case Management can access the Universal Work Queue functionality for nonmedia work types in the Agent Dashboard or through the Universal Work Queue HTML page.

To display the Universal Work Queue region, you can use personalization to hide or expose content, rename tabs and fields, and make other personalization changes.

For example, Customer Support implementations may choose to expose My Tasks and Unassigned Tasks on the Agent Dashboard if agents are using tasks in the resolution of service requests.

For more information on how to personalize and display flexible content, see Configuring and Personalizing HTML Modules Process Overview, page 43-1.

Work Queue Display

The Universal Work Queue displays your assigned work nodes and allows you to view

your current workload and select a specific node to view summarized information about each qualified work item.

The work items for each node are displayed in a tree (referred to as "HGrid") always displays on the left side of the Agent Dashboard or in Universal Work Queue page.

The work queue displays nodes for the following items:

- Service Requests - Displays service requests assigned to the agent.
- Tasks - Displays tasks owned or assigned to the user and tasks owned and assigned to the agent's group. Using the new work action associations, sites may determine the task based on user responsibility and task source document. This means that a service request task may be configured to launch the task manager, service request page depending on an agent's responsibility.
- My Leads - Displays agent owned leads.
- My Opportunities - Displays my opportunities and may be used to track hot or failing opportunities, work that requires near-term follow-up.

The service requests node displays service requests of types that are mapped to the agent's responsibility. Similarly tasks nodes display tasks that are attached to the service request types that are mapped to the agent's responsibility. For more information on service request security, see, Setting Up Security, page 10-1.

Requesting Work

This option is used to request distribution of one or more queued work items. The number of work items requested is predetermined by your administrator and your qualification.

The logic used by the 'Request Work' button is the same as the 'Next Work', except that work items that are already assigned to the agent are ignored.

The number of work items that are assigned to the agent is based on the profile "IEU: Distribute: Amount for distribute only". For example, if there are ten unassigned work items, and the value of the profile is set to three, each time the agent presses this button, the system assigns three work items to the agent.

Use this procedure to request distribution only. Universal Work Queue will attempt to distribute the specified number of work items.

Responsibility

Customer Support, Incident Manager or Problem Manager, and Case Worker

Prerequisites

None

1. In the Agent Dashboard, Universal Work Queue region or from the Universal Work

Queue page click **Request Work**.

This displays the Request Work page. This displays a list of all Work Sources (types) your current responsibility qualifies to receive.

2. Select the check box to include the work source for this request.

3. Click **OK** to receive work or **Cancel** to abort the request.

   A confirmation is displayed informing you of the amount of work distributed. Depending on available qualified work in the selected work sources you may receive all requested work, some requested work or no work.

Next Work Delivery and Distribution

The Next Work option is used to pull the next priority work item from the queue. Next Work derives the next important work item that the agent needs to work on based on the priority and due dates of the work item. It considers work items that are already assigned to the agent and work items that are unassigned to the agent but belong to a group that the agent is a member of. Work items that are already owned by other resources or those that are in a 'Closed' or 'On Hold' status or those that in a 'sleep' state are not considered for work distribution.

Responsibility

Customer Support, Incident Manager or Problem Manager, and Case Worker

Prerequisites

None

1. In the Agent Dashboard, Universal Work Queue region or from the Universal Work Queue page click **Next Work**.

   This displays the Next Work page. This displays a list of all Work Sources (types) your current responsibility qualifies to receive.

2. Select the check box to include the work source for this request.

3. Click **OK** to receive work or **Cancel** to abort the request.

Assigning a New Action

The lists of actions available to you from the Action page differ by work type and the source document (work source). Also different actions may be available when multiple work items are selected. Each node has a default action configured by your administrator.

Use this procedure to change the current action.

Responsibility

Customer Support, Incident Manager or Problem Manager, and Case Worker

Prerequisites

None

1. Select a work item from the work queue on the Agent Dashboard, Universal Work Queue region or from the Universal Work Queue page.
2. Click the icon in the Action column for the selected work item.
3. In the Actions list, select a new action for the work item.

   Depending on the action selected, different work item attributes are displayed. You can view and update the attributes.
4. Click **Apply**.

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Enabling Direct CTI

This chapter covers the following topics:

- About CTI Integration in Oracle Customer Support
- Implementing Direct CTI in Oracle Customer Support HTML
- Login Sequence for Direct CTI
- Call Flow Sequences in Customer Support

About CTI Integration in Oracle Customer Support

Computer Telephony Integration (CTI) enables agents working in Customer Support HTML application to receive screen pops that display customer information. The direct CTI feature launches a context-sensitive screen pop that is based on the information provided by the customer, for the agent who is answering the call.

Note: Do not switch responsibilities when you are using direct CTI.

Implementing Direct CTI in Oracle Customer Support HTML

1. Set the following profile options:
    - *Service: Enable Telephony Integration* to *Yes* to enable integrated telephony login in the Agent Dashboard.
    - *Service: Enable Outbound Telephony in Service Request* to *Yes* to enable the agent to make outbound calls.
    - *Service: Page Displayed When Customer Information Passed from Telephony System does not Match* to a value of your choice. This profile option is used to specify the page for screen pop for direct CTI integration in Customer Support HTML when the customer information passed from the telephony system does not

match. By default this is set to display the Find Service Request page.

- *CCT: Basic Telephony: Third Party URL* to *http://localhost:3107*. This profile option is used for specifying the third party URL for basic telephony.
- *CCT: Basic Telephony: Listener Port* to *8888*. This profile option is used for specifying the listener port for basic telephony.

2. Set the ACD_AGENT_ID as the agent's extension number and specify a password in ACD_AGENT_PASSWORD. The user has to log in to the application using the CRM Resource Manager responsibility, query for the agent or employee and specify the above details in the **Interactions** tab to enable the agent to successfully log in to the telephony system.

Login Sequence for Direct CTI

The login sequence using the Agent Dashboard is as follows:

1. The agent logs in to the Customer Support application.
2. The profile option *Service: Enable Telephony Integration* must be set to *Yes* to display the telephony login region on the Agent Dashboard.
3. The agent enters the extension number in the telephony region and clicks **Login**.
4. The direct CTI OA applet is launched, which sends data to the telephony system for validation.
5. If validation is successful, **Logout** button appears and the agent is ready to receive the call.

Call Flow Sequences in Customer Support

The various call flow sequences in Oracle Customer Support are as follows

Call Flow Sequence for the Agent Dashboard

The flow for incoming calls from the Agent Dashboard is as follows:

1. The agent logs in to the telephony system and is ready to receive calls.
2. The telephony system sends the IVR parameter entered by the customer to the direct CTI OA applet. The corresponding Update Service Request page is displayed.
3. The agent acts on the service request and saves it.

4. The agent clicks **End Call** to end the call. If the agent ends the call from the Agent Dashboard, the page is refreshed and the call information region is hidden. If the agent ends the call from the Update Service Request page, the page refreshes and the **End Call** button is hidden and the agent remains on the same page.

5. The call end information is sent by the direct CTI OA applet to the telephony system and the agent is ready to receive the next call.

Call Flow Sequence for the Service Request Page

The flow for incoming calls when the agent is on the Service Request page is as follows:

1. The agent logs in to the telephony system and is ready to receive calls.

2. The telephony system sends the IVR parameter entered by the customer to the direct CTI OA applet. The Update Service Request page refreshes with the new call information.

3. The agent acts on the service request and saves it.

4. The agent clicks **End Call** to end the call. If the agent ends the call from the Agent Dashboard, the page refreshes and the call information region is hidden. If the agent ends the call from the Update Service Request page, the page refreshes and the **End Call** button is hidden and the agent remains on the same page.

5. The call end information is sent by the direct CTI OA applet to the telephony system and the agent is ready to receive the next call.

Call Flow Sequence when Agent is not Working on the Agent Dashboard or the Service Request Pages

The flow for incoming calls when the agent is not working on the Agent Dashboard or the Service Request pages is as follows:

1. The agent logs in to the telephony system and is ready to receive calls.

2. The agent is working on another HTML page other than the Agent Dashboard or the Service Request pages.

3. The telephony system sends the IVR parameter to the direct CTI OA applet. The agent gets a message about the incoming call and to save the current work.

4. The agent clicks **OK** in the message. The Update Service Request page with the call information is displayed.

5. The agent acts on the service request and saves it.

6. The agent clicks **End Call** to end the call. If the agent ends the call from the Agent Dashboard, the page refreshes and the call information region is hidden. If the agent ends the call from the Update Service Request page, the agent gets a message about successful completion of the current call.

7. The call end information is sent by the direct CTI OA applet to the telephony system and the agent is ready to receive the next call.

Call Flow Sequence for Invalid IVR Parameter

The flow for incoming calls when IVR parameter is invalid is as follows:

1. The agent logs into the telephony system and is ready to receive the call.

2. The invalid IVR parameter is sent from the telephony system to the direct CTI OA applet.

3. Based on the value set in the profile option *Service: Page Displayed When Customer Information Passed from Telephony System does not Match*, the corresponding HTML page is displayed.

4. The agent clicks **Cancel** on the corresponding HTML page and is redirected to the Agent Dashboard to end the call.

Call Flow Sequence for an Outbound Call

The flow for outgoing calls is as follows:

1. The agent logs into the telephony system and is ready to receive or make calls.

2. The profile option *Service: Enable Outbound Telephony in Service Request* must be set to *Yes* to enable the agent to makes an outbound call.

3. The agent clicks the telephone icon next to the phone number in the Customer Profile region to make an outbound call.

4. When the outbound call is made, the telephone icon is hidden and the Update Service Request page refreshes and displays the **End Call** button.

5. The agent clicks **End Call** to end the call. The call end information is sent by the direct CTI OA applet to the telephony system and the agent is ready to receive the next call.

Part 6

Case Management Setups

This part of the guide includes procedures specific to Case Management. Setups shared with other service applications are described in other parts of this guide. For a list of implementation steps, please refer to the Case Management Implementation Checklist at the front of this book.

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Setting Up Case Management

This chapter covers the following topics:

- Configuring Case Management for Social Services
- Capturing Information About Unknown Parties in a Case
- Changing Message and Notification Text

Configuring Case Management for Social Services

The Case Management module is primarily targeted at investigative agencies, agencies who resolve security issues at airports or investigate thefts at department stores.

In investigative cases, agents must track multiple parties that are involved in the case, such as suspects, witnesses, and lawyers. This is accomplished through the associated parties functionality. Because there is no need to capture a unique "customer" in each case, the application does not display customer information by default.

Case workers in social service agencies work on behalf of individual clients. While some agencies can use the associated parties functionality to track client information, others need to display and use customers.

For example, you must expose and use customers if you want to use Oracle Install Base instances to track items on loan, such as wheel chairs in workers compensation cases, or to capture business licenses and permits granted to organizations.

This is because the design of Oracle TeleService requires that any Oracle Install Base instances associated to the case must be owned by or related to the case customer.

If you need to use customers, use Oracle application personalization to expose customer and Oracle Install Base regions and pages.

The following lists the regions you may need to expose using personalization (For details, please refer to Configuring and Personalizing HTML Modules, page 43-1):

- Customer column in the My Cases or Unassigned Cases tables in the Dashboard.

- In the Quick Find list, add Customer Name, Customer Email, Customer Number, Customer Phone.
- In the Create Case page, expose Customer Service Key, Subject (Product Information) regions, optionally - Customer Contact region.
- In the Update Case page, expose Customer Profile, Subject, Service Information, Instance Notes, Instance Service Requests regions.
- In the read only Case page, expose Subject, Primary Contact or Customer regions.
- In the Advanced Search Results region, expose the Customer column.

Capturing Information About Unknown Parties in a Case

If you want to capture information about parties whose identities are not known, such as perpetrators in a crime, you can do so by setting up one or more unknown parties.

An unknown party is an ordinary party of type Person with the name "Unknown". You can set up the unknown party directly in Case Management using the procedure below or using the Oracle Customer Data Hub.

To capture information about a perpetrator in a case, an agent adds the unknown party with the role "perpetrator" to the case and captures the rest of the information in associated party extensible attributes. (For information on setups required to capture associated party information, see Setting Up Associated Party Extensible Attributes, page 50-12.)

You can set up as many unknown parties as you want, for example, "Unknown1" and "Unknown2". However, using just one unknown party in all cases makes it simple to search for all cases where the perpetrator is unknown.

After you discover the identity of the unknown party, you can add that party as another associated party to the case and make the original unknown party association inactive. This way you can keep a historical record of the progression of the case.

To create the unknown party:

1. Under the Case Worker responsibility, navigate to the Agent Dashboard.
2. Select the Party Search link.

   The Party Search page appears.
3. Make sure that "Person" is selected in the Search For list, at the top of the page.
4. Click **Create**.

   The Create Person page appears.

5. Enter "Unknown" in the Last Name field and make entries in the remaining required fields.

6. Click **Apply**.

Changing Message and Notification Text

All messages (error, warning, information) as well as notification templates use the term ""service request"". As an implementation step, you may want to replace messages beginning with "CS" with the proper term, such as "case" and "matter".

For information on how to modify messages see *Oracle E-Business Suite Developer's Guide*.

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Setting Up Associated Parties

This chapter covers the following topics:

- About Party Roles and Party Role Groups
- Setting Up Party Roles and Party Role Groups Process Overview
- Creating a Party Role
- Updating a Party Role
- Creating a Party Role Group
- Updating a Party Role Group
- Capturing Associated Party Information in a Case
- Setting Up Associated Party Extensible Attributes
- Mapping Attribute Groups to Associated Party Roles
- Specifying the Display of Attributes on the Add Party Page

About Party Roles and Party Role Groups

Each time agents associate an individual to a case, they must select a party role from a list of values to describe the role the individual plays in the case. You must set this list up using the procedures in this chapter. For a smuggling case, the roles you may include suspect, lawyer, investigator, and forensic specialist, for example. Social service agency cases may instead require case worker, teacher, and psychologist.

You can group the party roles you create into party role groups. Party role groups make it possible for agents to display only associated parties from that group filtering out the others. For example, choosing "Defense Team" in the Update Case page limits the information displayed to defense lawyers, legal assistants, and witnesses on the case.

Party role groups are also useful for keeping groups involved in a case appraised of its progress. You can set up the application to automatically notify interested parties either by role or role group when the case status changes, new information is added, or the case is reassigned. (See Setting Up Notifications, page 21-1.)

By setting up the notification for the defense team party role group, you can notify the entire defense team with one set up.

Contacts

There is one predefined party role (Contact) and one predefined role group (Contacts).

The Contact party role is special because a contact in a case must either be an employee or have an existing relationship with the customer:

- If the case customer is a person (for example, Andre Beaulie), the contact must either be the person himself (Andre Beaulie) or a party related to the customer (for example, Mary Beaulie - Spouse of - Andre Beaulie).
- If the case customer is an organization (for example, Business World), the contacts must be relationship parties related to the customer party in the Trading Community Architecture (TCA) party model (for example, Andre Beaulie - Employee of - Business World).

For this reason, you must not use the Contact role or the Contacts role group if you are not exposing customer information in your application.

About Sort Order

You can define the order in which party roles and party role groups appear in the lists of values and on the Update Case page.

Creating a sort order is optional. By default, the application displays party roles and groups in alphabetical order. The application sorts first by the order and then alphabetically.

> **Note:** If you do create a sort order, then use sequences of whole numbers large enough to permit inserting new values in the future. For example, 10, 20, 30, instead of 1,2, and 3.

For example, you can create party roles and groups as listed in the table below:

Party Role	Sort Order
Suspect	10
Judge	<no entry>
Defense Attorney	<no entry>

Party Role	Sort Order
Witness	20
Prosecution Attorney	-
Lead Investigator	-
Source	30

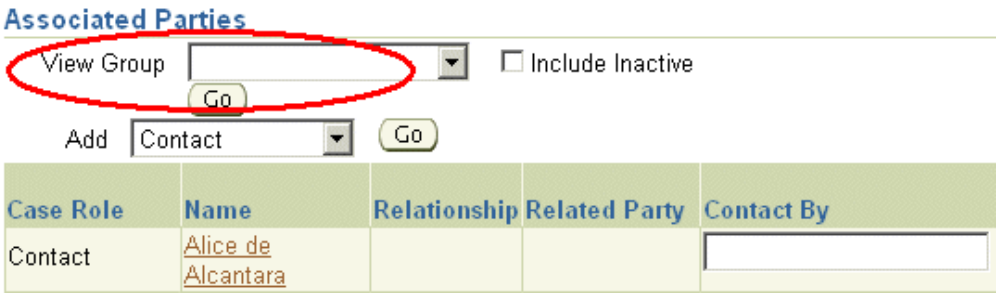
Party Role Group	Sort Order
Defense Team	10
Prosecution Team	20
Legal Team	-
Court	-

You then map the party roles into the groups as follows:

Party Role Group	Party Role(s)
Defense Team	• Defense Attorney • Suspect • Witness
Prosecution Team	• Prosecution Attorney • Lead Investigator • Witness • Source

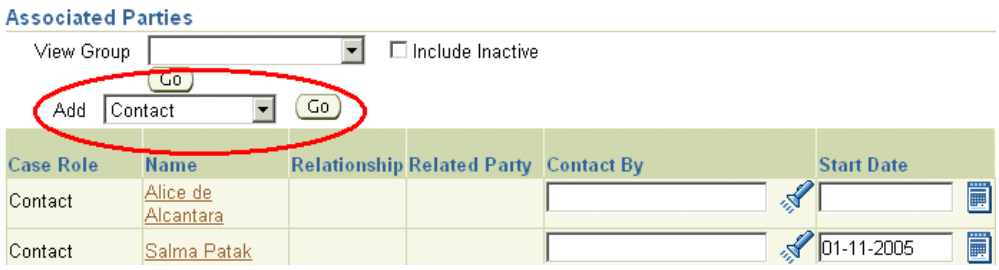
Party Role Group	Party Role(s)
Legal Team	• Defense Attorney • Prosecution Attorney
Court	• Judge

The setup has the following effect on the Update Case page where you enter associated parties:



The View Group list contains the following:

- Defense Team
- Prosecution Team
- Court
- Legal Team



The Add list displays the following:

- Suspect
- Witness

- Source
- Defense Attorney
- Judge
- Lead Investigator
- Prosecution Attorney

The application sorts the display of parties by the party role sort order, the party role name, and the party name.

When you do not restrict the list by group, you can view the associated parties ordered as follows:

- Suspect
- Witness
- Source
- Defense Attorney
- Judge
- Lead Investigator
- Prosecution Attorney

Choosing View Group: Defense Team displays:

- Suspect
- Witness
- Defense Attorney

Choosing View Group: Prosecution Team displays:

- Witness
- Source
- Lead Investigator
- Prosecution Attorney

Choosing View Group: Legal Team displays

- Defense Attorney

- Prosecution Attorney

The Role list in the Advance Search page displays the same order as the Add list in the Update page.

Setting Up Party Roles and Party Role Groups Process Overview

Use this general procedure to set up party roles and role groups. For an overview, see About Party Roles and Party Role Groups, page 50-1.

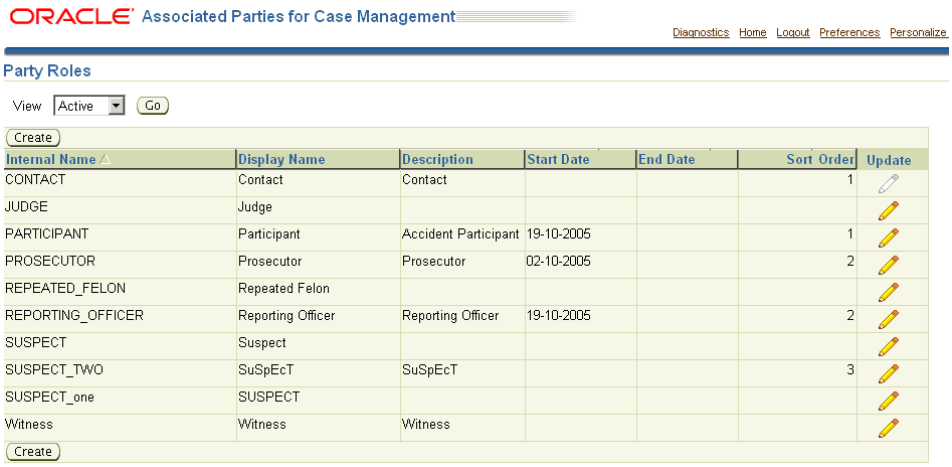
Prerequisites::

You must plan out the party roles and party role groups before you start.

To set up party roles and role groups:

1. Set up party roles:
    1. Under the Service responsibility, navigate to Setup, then Definitions, and select Associated Parties for Case Management, Party Roles.

       The Party Role summary page appears displaying existing party roles including the seeded Contact party role.

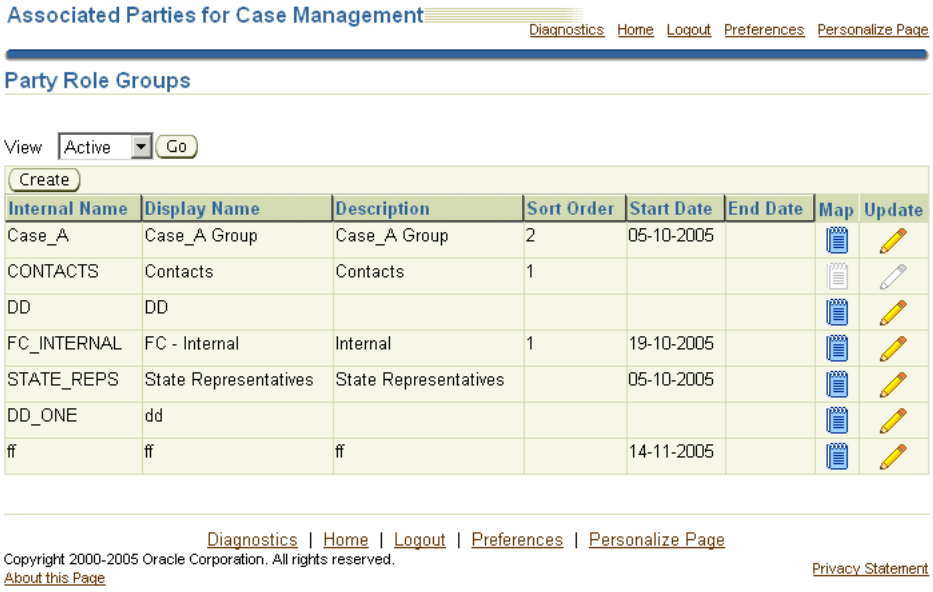


    2. Click **Create** to create party roles. See Creating a Party Role, page 50-7.

    3. If you are not exposing customer fields in your implementation, then click **Update** and enter an end date to disable the predefined Contact party role .

2. Set up party role groups and map the party roles to them:
    1. Navigate to Setup, then Definitions, and select Associated Parties for Case Management, Party Role Groups.

The Party Role Groups summary page appears displaying existing party role groups including the seeded Contacts group.



2. Click **Create** to create party role groups and**Map.** to map the roles to them.For details, see Creating Party Role Groups, page 50-9.

3. If you are not exposing customer information in your implementation, click **Update** next to Contacts and disable the predefined role group by entering an end date.

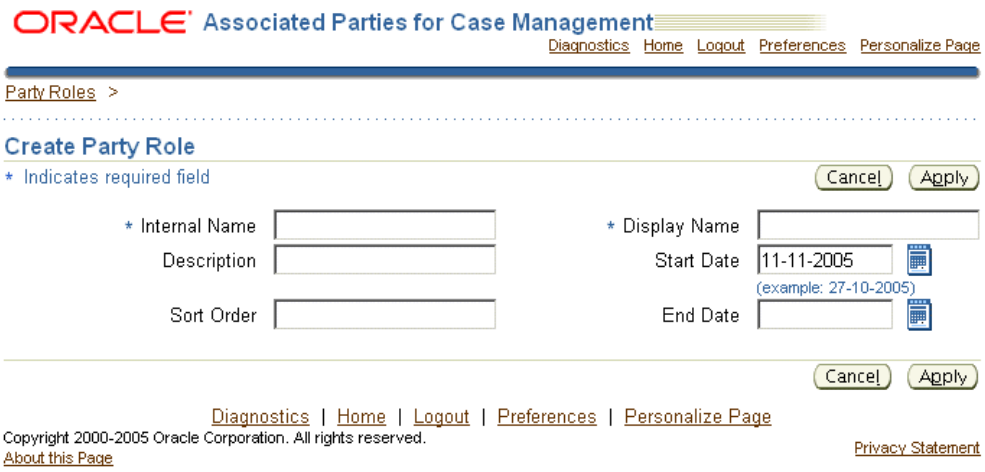
Creating a Party Role

Use this procedure to create party roles.

To create a party role:

1. Click **Create** on the Party Roles page.

   The Create Party Role page appears.



2. Enter a unique Internal Name (not visible to users) and the Display Name (the name visible to agents). In the Internal Name, you are permitted to use only alphabetic characters and the underline character, "_".

   Note: You cannot update the Internal Name after you save.

   The other entries are optional.

   The sort order field makes it possible for you to define the order in which the party roles appear in lists of values and search results. If you do not set up a sort order, then all roles you define are sorted alphabetically. See About Sort Order, page 50-2.

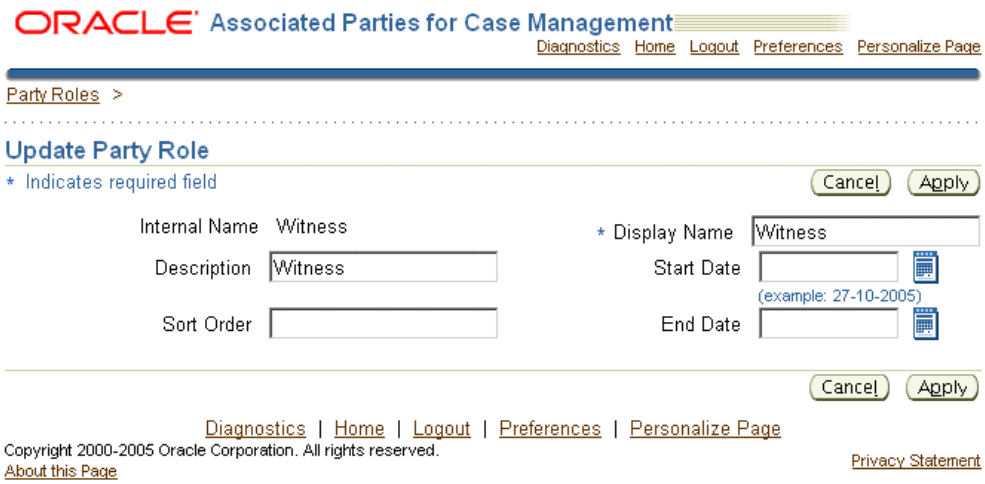
Updating a Party Role

Use this procedure to update a party role.

To update a party role:

1. Click **Update** next to the entry you want to update on the Party Roles page.

   The Update Party Role page appears.



You can update:

- The name the agent sees, the Display Name
- The description
- The sort order (for details, see About Sort Order, page 50-2)

You can remove the role from use by entering an end date.

Creating a Party Role Group

Use this procedure to group party roles into party role groups. Party role groups organize party roles in lists of values and simplify notifications of parties associated to cases. For an explanation, see About Party Roles and Party Role Groups, page 50-1.

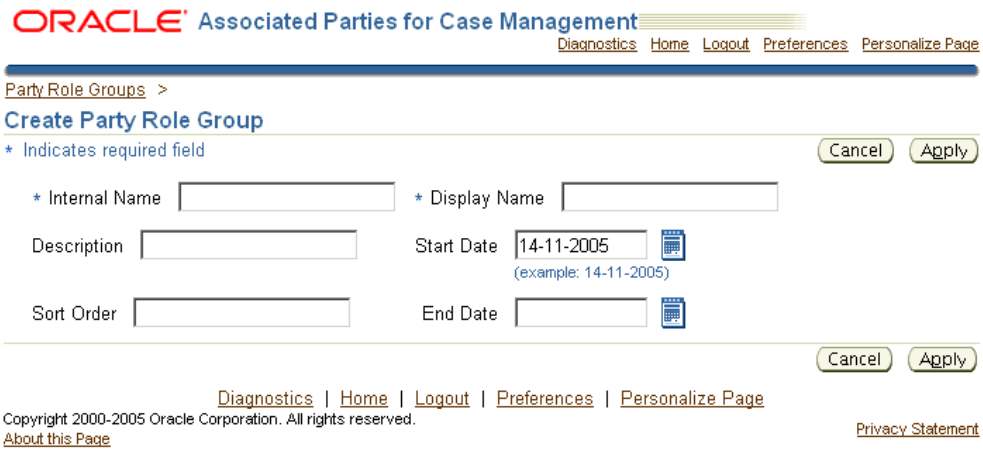
Prerequisites:

Set up the party roles first. See Creating a Party Role, page 50-7.

To create a party role group:

1. Click **Create** on the Party Role Groups page.

   The Create Party Role Group page appears.



2. Enter a unique Internal Name (not visible to users). You are permitted to use only alphabetic characters and the underline character, "_".

   Note: You cannot update the Internal Name after you save it.

3. Enter the name users see in the Display Name.

   The other entries are optional.

   The sort order field makes it possible for you to define the order in which the party role groups appear in lists of values and search results. If you do not set up a sort order, then the application sorts the groups alphabetically. For more information, seeAbout Sort Order, page 50-2.

4. Click **Apply** to save and return to the Party Role Groups page.

5. Click **Map** next to the new group and enter the party roles you want to include in the group on the Party Role Mappings page.

Updating a Party Role Group

From the Party Role Group page:

- Click **Map** to modify the list of roles available for the group by .
- Click **Update**, to:
  - Remove the group from use by entering an end-date
  - Change the sort order (see About Sort Order, page 50-2)

- Change the name of the group.

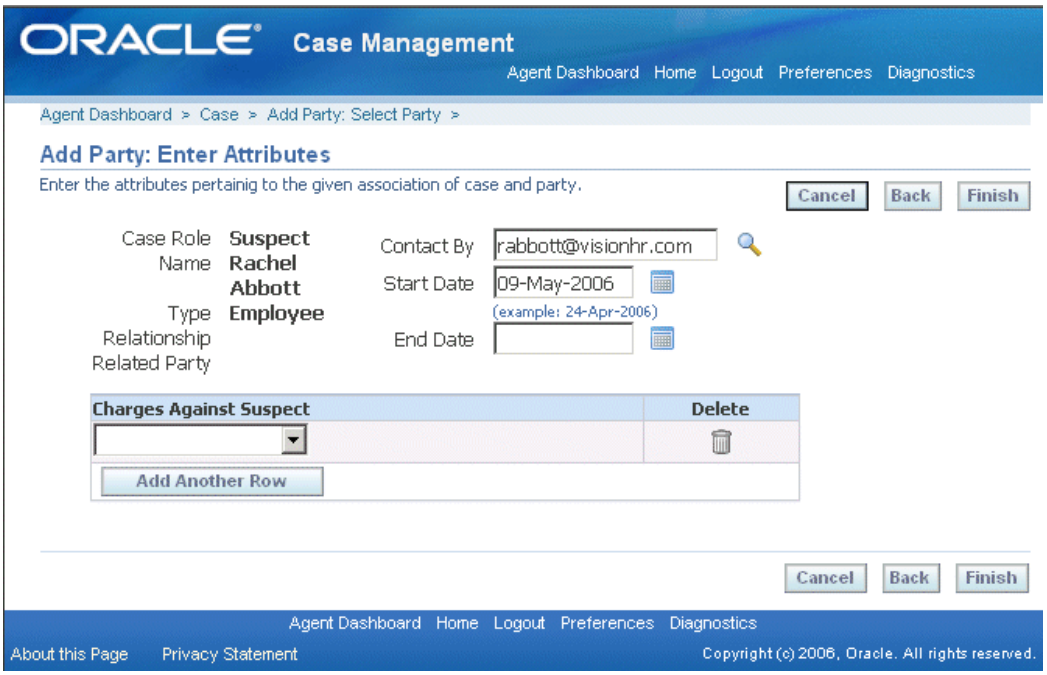
Capturing Associated Party Information in a Case

You can capture information about the parties you associate to a case using the same extensible attribute architecture that is used for capturing service request information.

For example, an investigative agency can use attributes set up with this architecture to capture charges against a suspect in a case. A social service agency can use it to capture eligibility information for benefits.

Many of the concepts and setups are identical to those used for service request extensible attributes and are not repeated in this chapter. Before you start implementing associated party extensible attributes, you must be familiar with the detailed discussion in Capturing Additional Service Request Information with Extensible Attributes, page 45-1.

Agents enter the attributes immediately after they associate a party to a case, on the Add Party: Enter Attributes page shown below. The image includes a multi-row Charges attribute that has been set up to enter charges against a suspect:



Associated party extensible attributes capture information about the parties and employees as they relate to a particular case. This information is stored with the case rather than the party or employee record. This means the information captured is not available in other cases or when viewing the party information itself.

Note: If you want to capture general information about a party, such as hair color or eye color, for example, then you must set up extensible attributes for the party instead. See Oracle Trading Community Architecture documentation for details.

Associated party extensible attributes improve on the existing descriptive flexfield architecture on which they are built in the following ways:

- You can capture an unlimited number of additional attributes.
- Extensible attributes permit multiple row entries.
- You can capture different information for parties with different roles in the case. For suspects this may be charges, for witnesses it may be their location, and for lawyers on the case, their availability.

However, these attributes do not appear on the search page. This means that, in difference to service request extensible attributes, you cannot search on the information agents enter. You can only search on the associated party and role itself.

For example, if you enter John Smith as a suspect in a case and enter the charges against him using this feature, you cannot search for the case by those charges later. You can only search for all cases involving John Smith as a suspect and examine them one by one to see what the charges are.

Setting Up Associated Party Extensible Attributes

Use this general procedure to guide you through the associated party extensible attribute setup. Follow the references in each step for more details.

Although many steps (including the creation of value sets and attribute groups) are almost identical to those for creating service request extensible attributes, use the navigation and pages described here for your setup. The attribute groups you create are specific to associated parties. You cannot reuse the attribute groups you have setup for service requests here.

Prerequisites:

You must first set up party roles. See About Party Roles and Party Role Groups, page 50-1.

To set up extensible attributes for associated parties:

1. If agents uselists of values or lists to make their entries, then create the value sets:
    1. Navigate to Setup, then Definitions, and select Associated Parties for Case Management, Party Roles Extensible Attributes, Value Sets.

2. In the Maintain Value Sets page, click **Create** to create the value set.

- For more information about specific fields in the creation page, see Setting Up Value Sets, page 45-7.
- For a simple example, see Example of Value Set Setup for Item Location, page 45-18.
- For an example of how you can make the entry of one attribute dependent on another, see Example of Dependent Attribute Setup, page 45-27.

  (You can have the list of available values depend on the entry an agent has made in another attribute. For example, the list of charges depend on the law that the suspect has broken.)

2. Create the attributes themselves as part of an attribute group:
   1. Navigate to Setup, Definitions, Associated Parties for Case Management, Party Roles Extensible Attributes, Attribute Groups And Attributes.
   2. Click **Create** on the Attribute Groups page to create the attribute group and attributes.
      - For a general procedure, see Setting Up Attributes and Attribute Groups, page 45-9.
      - For an example, see Example of Attribute Group Setup for Item Location, page 45-19.
3. Map the attribute groups to the associated party roles. See Mapping Attribute Groups to Associated Party Roles, page 50-13.
4. Optionally, navigate to Setup, then Definitions, and select Associated Parties for Case Management, Party Roles Extensible Attributes, Functions, and create custom functions. See Creating Custom Functions for Attributes, page 45-17.
5. Create the regions in the Add Party: Enter Attributes page where the attributes display. See Specifying How Attributes Display on the Add Party Page, page 50-15.

Mapping Attribute Groups to Associated Party Roles

Use this procedure to specify the attributes you want to capture with associated party roles. To capture charges for suspects, for example, you map the Charges attribute group to the Suspect role. You can map multiple attribute groups to a role.

This procedure is a part of the required setup for associated party attributes. SeeSetting Up Associated Party Extensible Attributes, page 50-12.

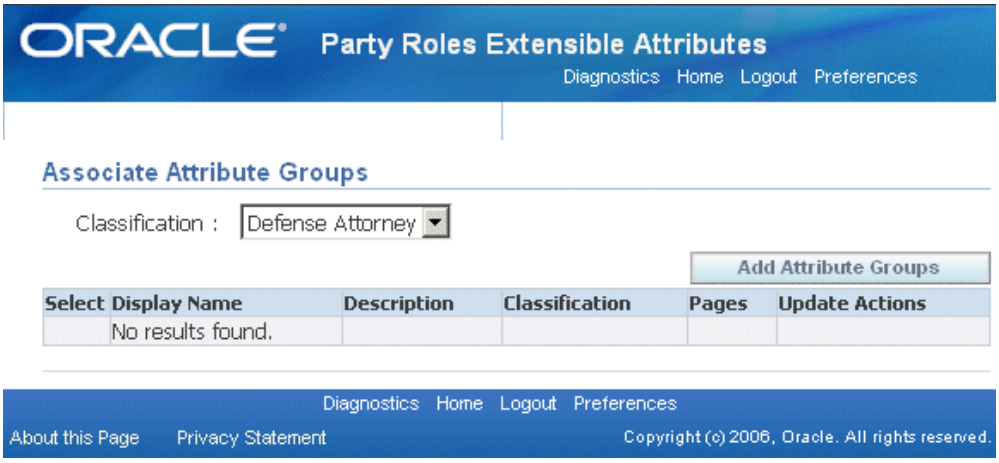
Prerequisites:

You must create the attribute groups and attributes first.

To map attribute groups to associated party roles:

1. Navigate to Setup, then Definitions, and select Associated Parties for Case Management, Party Roles Extensible Attributes, Attribute Group Associations.

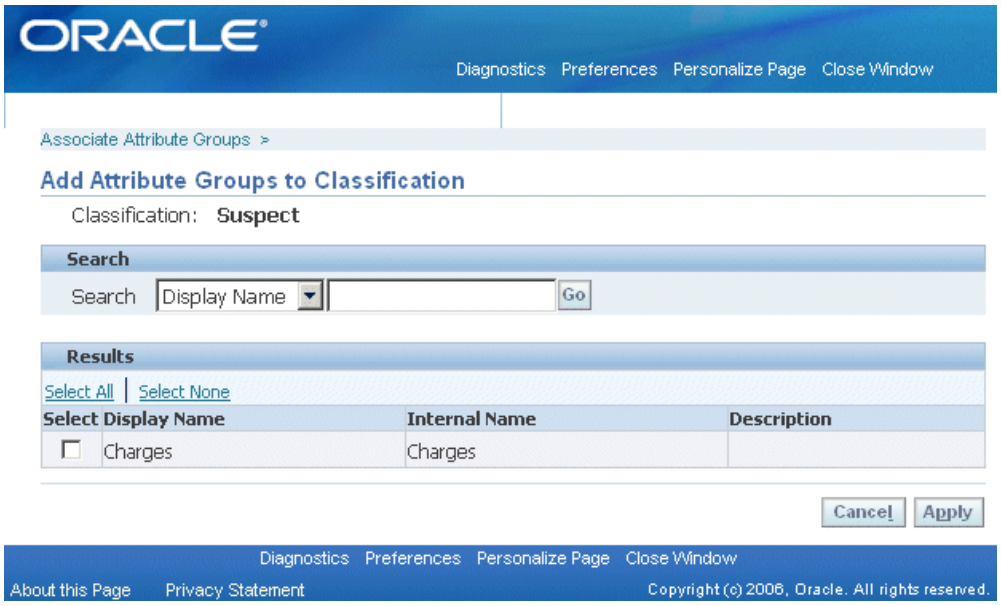
   The Associate Attribute Groups page appears.



2. Choose the associated party role from the Classification list.

3. Click **Add Attribute Groups**.

   The Add Attribute Groups to Classification page appears.



4. Select the attribute group (you can search for it if required first).

5. Click **Apply**.

Specifying the Display of Attributes on the Add Party Page

Use this procedure to specify how an attribute displays on the Add Party: Enter Attributes page.

This procedure is a part of the required setup for associated party attributes. See Setting Up Associated Party Extensible Attributes, page 50-12 for details.

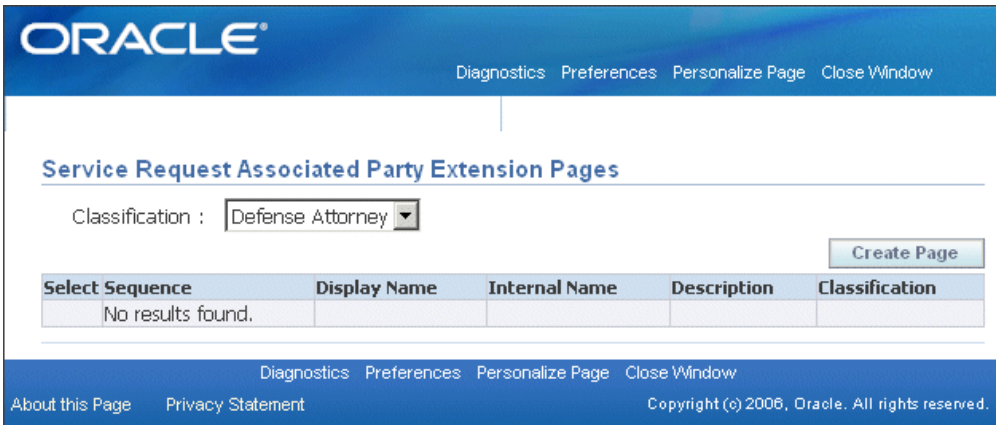
Prerequisites:

You must first set up the associated party attributes.

To specify the display of attributes on the page:

1. Navigate to Setup, then Definitions, and select Associated Parties for Case Management, Party Roles Extensible Attributes, Page Associations.

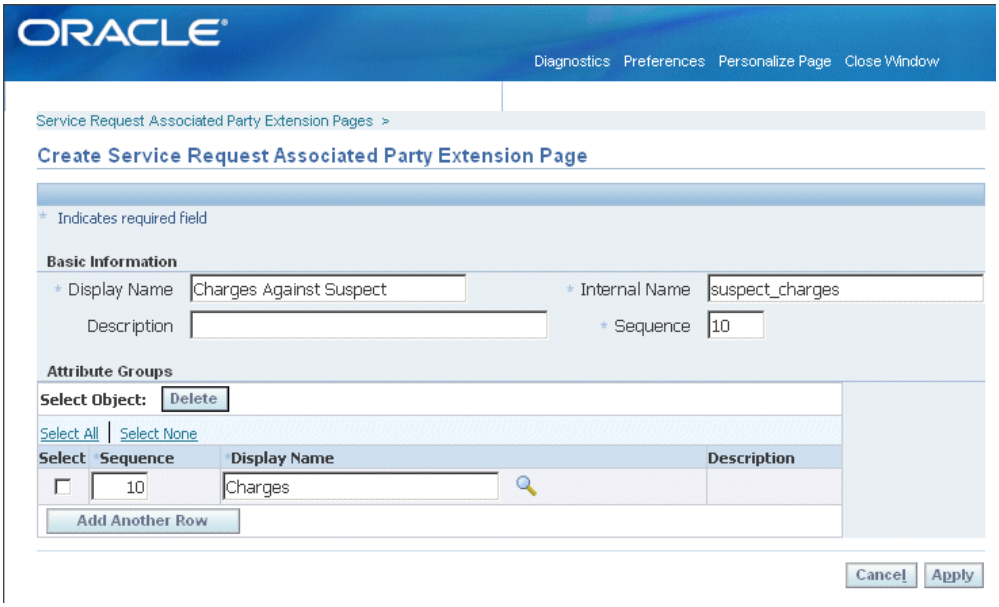
   The Service Request Associated Party Extension Pages page appears.



2. Choose the associated party role you want to set up from the Classification drop-down list.

3. Click **Create Page**.

   The Create Service Request Associated Party Extension Page appears.



4. Enter the following details:

   - The text you enter in Display Name becomes the heading for the region. (If you enter the same string as the Display Name for the attribute group, then the attribute group heading does not appear in the page.)

   - The Internal Name must be a unique page name (but can have the same name as the attribute group).

- Unless you are entering multiple pages, the sequence number does not matter.

5. Add the attribute group(s). The sequence specifies the order in which multiple groups appear in the page.

Part 7

Sample User Procedures

51

Customer Support User Procedures

This chapter covers the following topics:

- About the Sample Customer Support User Procedures
- Creating a Service Request
- Resolving the Service Request
- Creating and Updating a Task
- Searching Service Requests
- Searching for Tasks
- Creating Escalations

About the Sample Customer Support User Procedures

Because user procedures and user configurations vary greatly from implementation to implementation, Oracle cannot provide end-user help for the Customer Support module.

This chapter uses an example to provide application implementers and administrators with an introduction to typical user procedures for creating and resolving a service request and for searching in the Customer Support module of Oracle TeleService.

The example details how the fictitious support organization Vision Enterprises handles a problem on a laptop tracked by Oracle Install Base.

Vision Enterprises resolves customer problems in two steps:

1. A support representative logs the problems first and verifies customer information.
2. The application then assigns the service request to the appropriate support group for resolution.

The support organization assigns work to the different support groups based on service territories and leaves it up to the agents to determine what they want to work on next.

Agents can choose to work on any item in either their personal work queue or in the Unassigned Work queue.

In this section you can learn about:

- Creating a service request, page 51-2
- Resolving the service request, page 51-10
- Searching service requests, page 51-19

Creating a Service Request

This example illustrates the creation of a service request for an existing install based item.

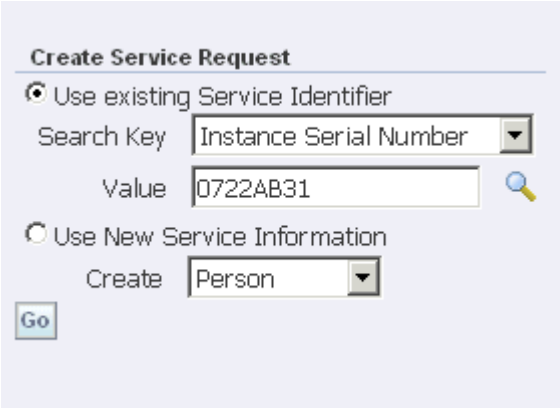
1. Albert King, a representative for the customer Business World, calls to report that a laptop in his organization does not boot up properly.
2. Mr. King gives customer support agent Ted Crilly the unit's serial number.
3. To create the service request, Mr. Crilly starts in the Create Service Request region on the Agent Dashboard.
4. Because the customer gave him the unit's serial number, Mr. Crilly selects the Use Existing Service Identifier option.

   Note: Mr. Crilly can also create a service request from by creating a person or organization, or searching for existing parties. For more information on searching for parties to create a service request, refer Creating a Case.

5. . He chooses the Serial Number as the search key from the Search Key drop-down list and enters the serial number 0722AB31. If the Services: Check for Similar Service Requests profile is set to Yes, then a page displays similar requests that have 0722AB31 as the serial number.

   Search keys are unique identifiers for customers and their products that can be used to populate the service request with the required information. Mr Crilly can view the product information related to the above serial number. He clicks the Graphical View button to view a graphical view of the item instance relationship.

   Note: If the customer did not know the serial number, Mr. Crilly could use other search keys, such customer name or account to populate information about the customer.

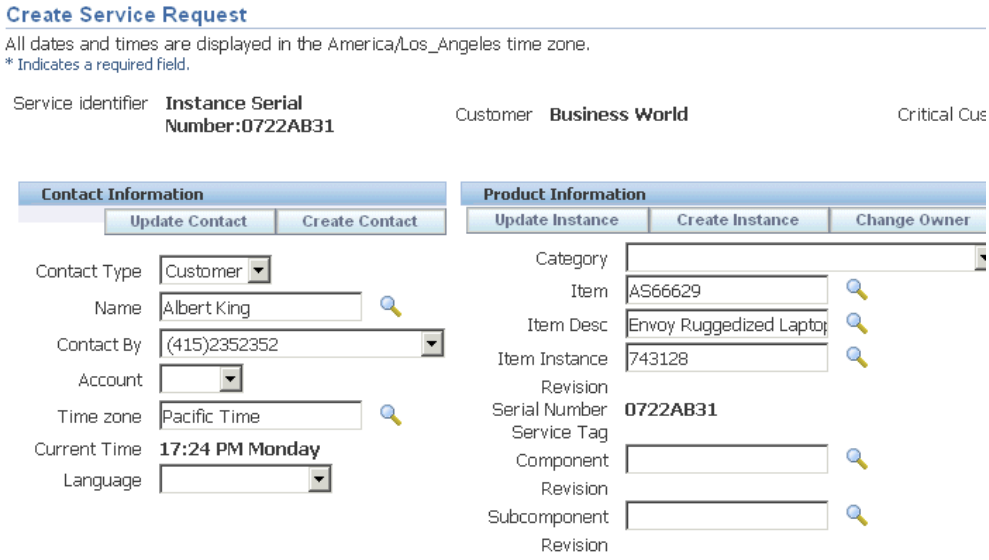


Mr. Crilly can also use the Service: Address Filter Options profile option to filter the incident addresses instead of using the serial number. He can select from any of the following values: All, Customer Sites and Related Party Sites, Customer Sites, Related Party Sites and Location, Null, Customer Sites Only, and Customer Sites and Locations.

If he selects…	Then…
All	Incident Customer LOV displays all parties including person, organization, and relationship. Incident Address LOV displays all active party sites and free standing locations.
Customer Sites and Related Party Sites	Incident Customer LOV displays all parties related to the customer party selected in the service request. Incident Address LOV displays all party sites and party related to the customer.
Customer Sites, Related Party Sites and Location	Incident Customer LOV displays all parties related to the customer party selected in the service request. Incident Address LOV displays all party sites and party related to the customer, and free standing locations.
Null	Incident Address LOV displays all active party sites and free standing locations.

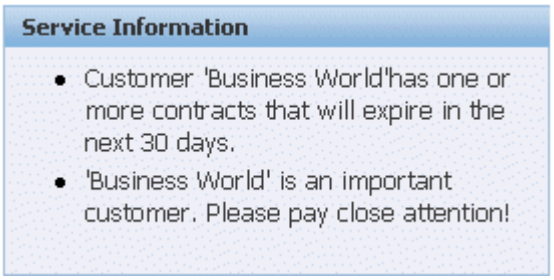
If he selects…	Then…
Customer Sites Only	Incident Customer is the same as the customer party on the service request. Incident Address LOV displays active party sites.
Customer Sites and Locations	Incident Customer is the same as the customer party on the service request. Incident Address LOV displays activity party sites and free standing locations.

6. Clicking **Go** opens the Create Service Request page.



The page opens populating the information about the laptop and the primary contact for the customer.

A notification in the Service Information region informs the agent that some of the customer's contracts are about to expire.



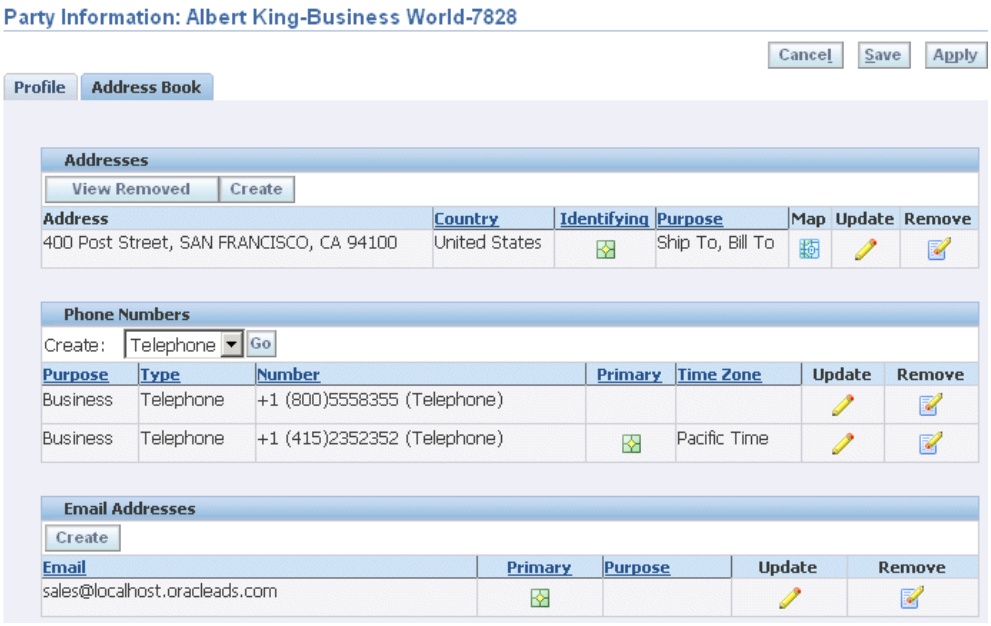
Note: You can automatically notify agents of customers that meet any kind of criteria by setting up relationship plans. See Setting Up Relationship Plans, page 23-1.

7. In the Product Information region, Mr. Crilly enters Vision Operations as the expenditure organization. He next selects the project number 3745, and "Move hard drive" as the project name. He then associates project task number 9843 and project task name "contact transporter" to the service request.

8. The agent views Mr. King's contact information, the contact type, name of the contact, the contact's complete phone number with the country code and extension, the time zone of the contact, and the preferred language. The agent verifies that Mr. King's contact information is correct by clicking the **Update Contact** button.

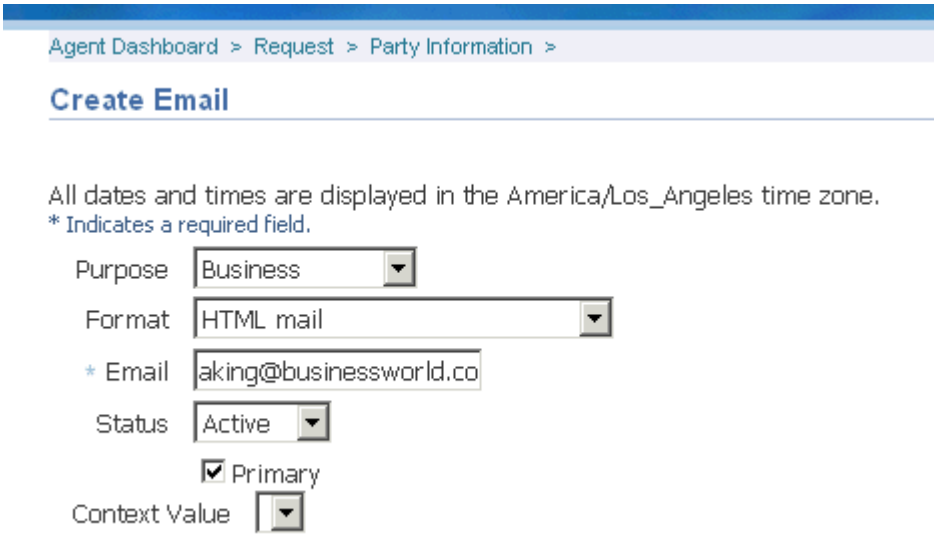
   The Party Information page appears with the contact details.

   Note: The Contact field can be made mandatory while creating the service request by setting the profile Service: Make Contact Mandatory to Yes.



9. Mr. King wants to be contacted via a new e-mail address, so the agent clicks **Create** in the Email Addresses region and adds the new e-mail address on the Create Email page.

> **Note:** Mr. Crilly can also click the envelope icon next to Mr. King's email address, if email is the chosen method of contacting him



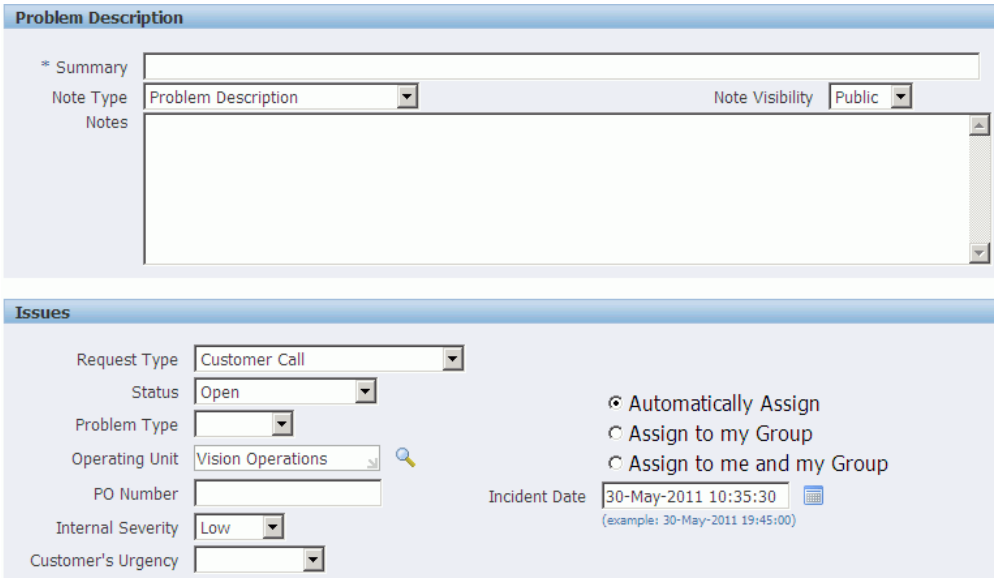
10. Choosing the Primary check box makes this the primary contact method for this

contact.

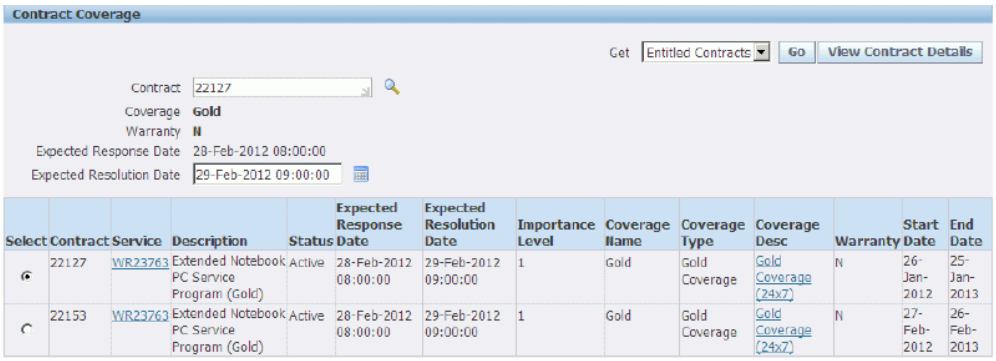
11. The agent returns to the Create Service Request page and enters the problem summary "Does not boot" into the Summary field, chooses "Cause" as the note type and retains "Public" as the note visibility.

    Note: The default Note Type and Visibility are set in the profiles Service: Default New Note Type and Note: Default Note Status respectively. Mr. Crilly can change these values, if needed while creating the service request.

    The agent then chooses the service request type "Customer Call" using the Request Type drop-down list in the Issues Region. If Extended Attributes are set up for the default Request Type and when the agent creates a service request, then by default the Additional Attributes region is displayed. The Additional Attributes region is displayed even when the service request is updated, if Extended Attributes are set up for the default request type.



12. . Next, Mr. Crilly checks the entitlements in the Contract Coverage region. The application displays entitled service contracts for the laptop based on the business process, and provides the contractual response and resolution date, so Mr. Crilly can inform Mr. King when to expect the problem to be resolved.



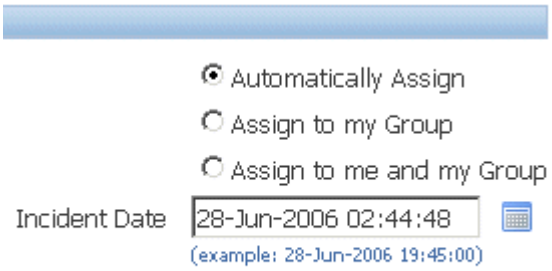
The application automatically defaulted a service contract for the laptop and provides the contractual response and resolution date, so Mr. Crilly can inform Mr. King when to expect the problem to be resolved.

13. The agent can review coverage details by clicking **View Contract Details** or the Coverage Description link in the table.

14. Next, the agent specifies the billing and shipping information for the customer. He can manually enter these details or choose to display the default values based on the *Service: Default Bill To and Ship To Address Options* profile option. If the profile is set to *Default from Customer*, the billing and shipping information is displayed based on the customer's primary bill to and ship to addresses respectively. If the profile is set to *Default from Installed Base*, then the billing and shipping information is displayed based on the respective addresses defined in the item instance of the service request. If the Bill To and Ship To addresses are not defined in the item instance or these addresses do not have a valid relationship with the service request's customer party as defined in Oracle Trading Community Architecture, then the Bill To and Ship To addresses are set based on the customer's primary address on the service request header.

15. The agent is now ready to save the new service request. When the agent saves the service request, if the Services: Check for Duplicate Service Requests profile is set to Yes, then all requests that are a duplicate of this request are displayed in a separate page.

16. The selection of the button in the Issues Region determines how the application assigns the service request after it is saved.



The Assign Automatically option causes the application to assign the service request to the appropriate support group or to a specific agent, depending on how you set up your work assignment and distribution. If the *Service: Real-Time Automatic Assignment of Service Requests in Agent-Facing Applications* profile is set to *Yes*, then the Assign Automatically option is selected by default but if the profile is set to *No*, then the default value is Assign Manually. Agents can change the assignment mode.

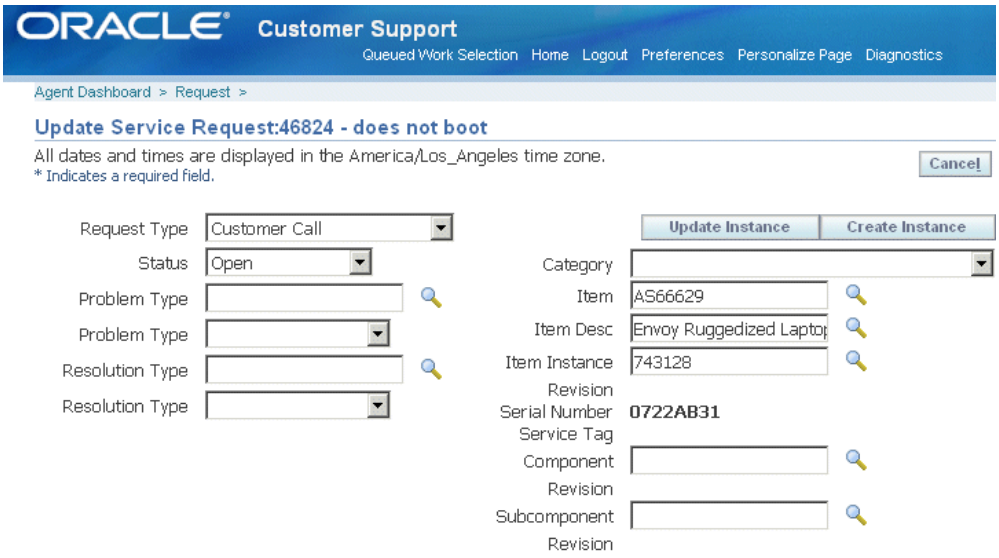
Alternately, the agent can keep possession of the service request by choosing Assign to me and My Group option or keep ownership in her support group by choosing Assign to My Group, or may want to assign the service request manually to some other agent by choosing Assign Manually option.

If the assignment mode is manual, then the default values for Assigned Group and Individual Owner are displayed from the profiles *Service: Default Group Owner for Service Requests* and *Service: Default Service Request Owner* respectively, if they are defined.

17. Clicking **Apply** creates the new service request and triggers the assignment process.

18. The application automatically opens the new service request in the Update Service Request page. You can update some of the service request attributes.

    The agent can inactivate a contact by selecting the Inactive check box. However, a primary contact cannot be inactivated if it is the only contact for that service request, and the Service: Make Contact Mandatory profile option is set to Yes.



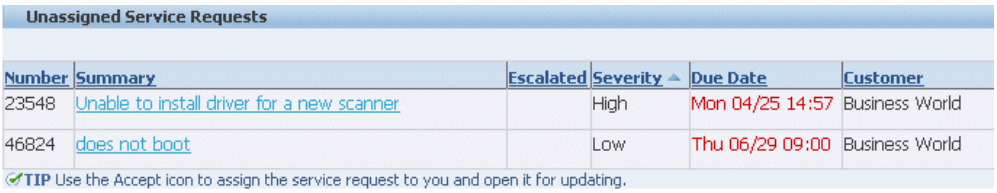
19. Because the service request is resolved by a different agent, the agent clicks Cancel to return to the Agent Dashboard.

> **Note:** You can have the customer automatically notified by e-mail that the service request has been created. See Setting Up Notifications, page 21-1.

Resolving the Service Request

This topic details how Mary Swanson, support engineer in the laptop division, resolves the service request.

1. Checking the Unassigned Work queue, Ms. Swanson sees that a new service request is created for Business World.

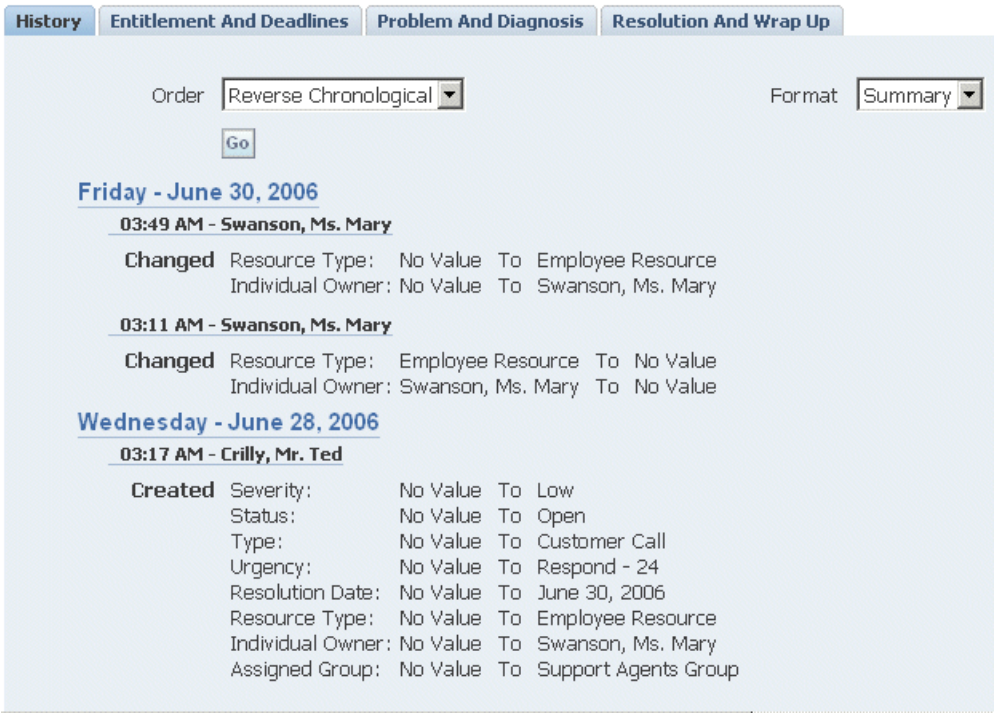


2. Her first action is to assign the service request to herself by selecting the **Accept** icon to the right of the service request (highlighted in the image below). Assigning the request to herself assures that nobody else in her support organization tries to update the service request at the same time.

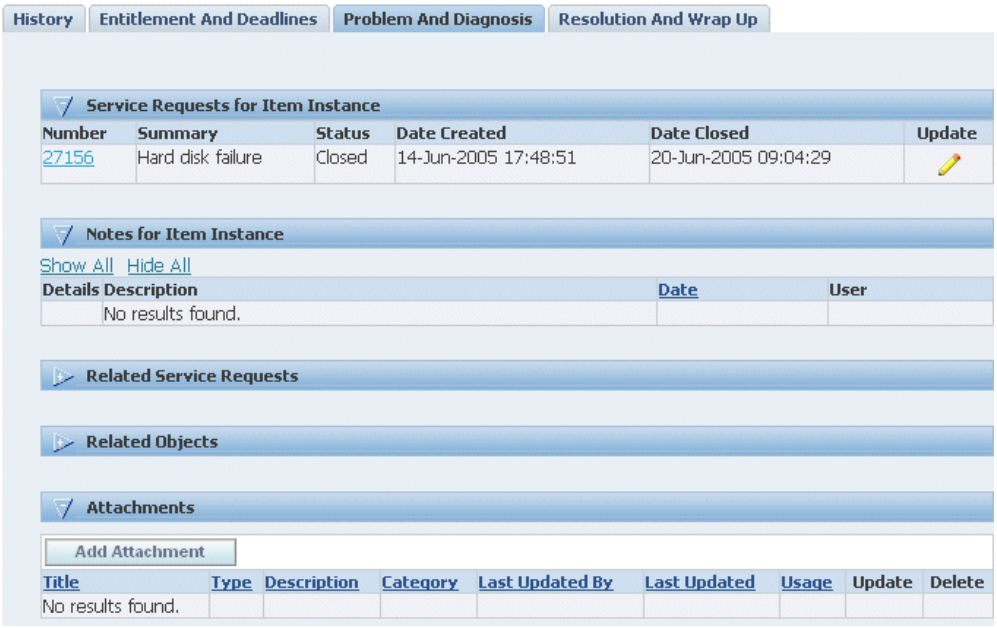
3. The service request opens in the Update Service Request page.She can also click on the **Quick Update** icon to update the status, group, and owner of the service request and click the **Quick Notes** icon to view any notes for the service request.

4. Agent Crilly clicks the Dashboard tab to view if there are any pending tasks.

5. As there is a long list of notes on the History tab, Ms. Swanson filters data by selecting the **Service Request Audit** check box. Ms. Swanson can see that the service request was created by agent Ted Crilly.



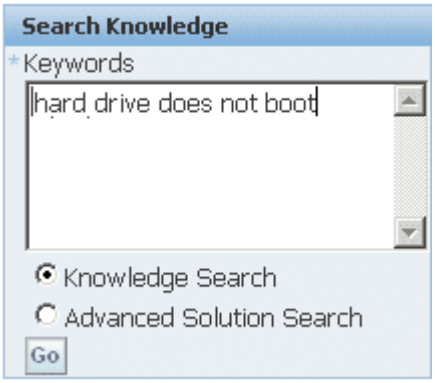
6. On the Problem and Diagnosis tab, she notices that the laptop had recently had its hard disk replaced.



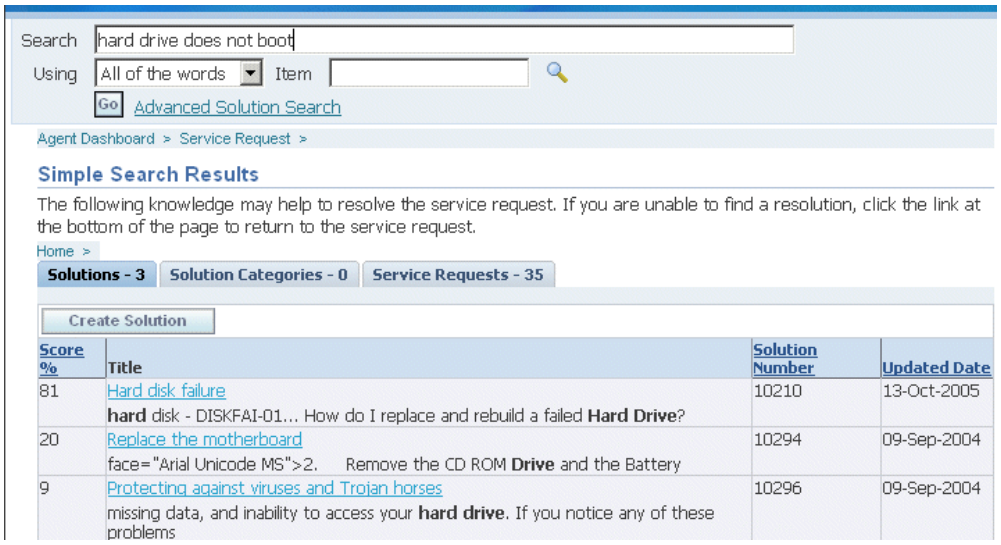
7. In the Related Service Requests region, she sees that the service request is linked to another service request with the number 48832, whose Summary is "Disk fails when loaded", type is "Computer Problem", and status is "Open". If the service request is in a status that does not allow any updates to the service request, then Ms. Swanson will not be able to update it. For more information, see Service Request Statuses, page 7-8 .

8. The problem could be with the new hard drive. Ms. Swanson decides to do a knowledge base search to see if there are any solutions available.

9. She enters a few additional key words into the Search Knowledge and clicks **Go**.

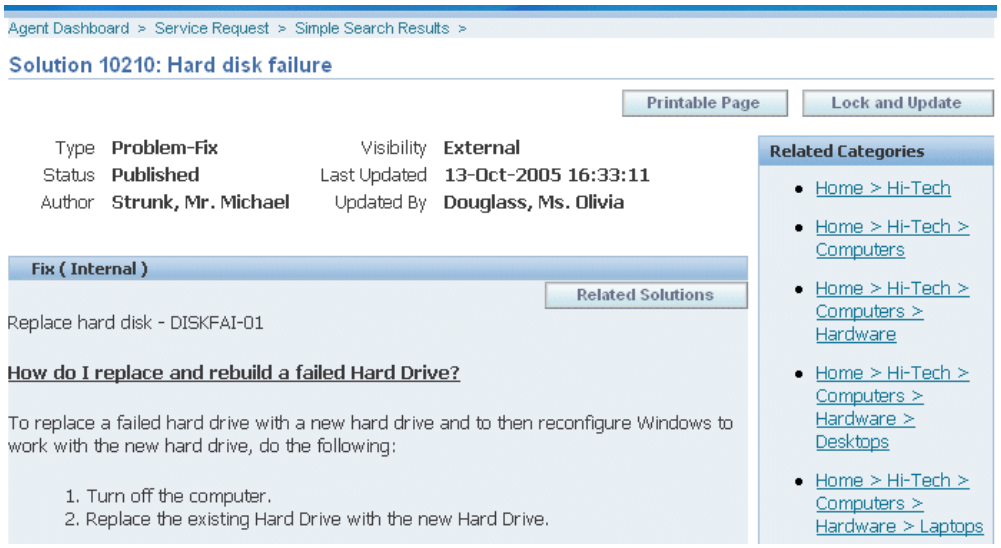


10. The Simple Search Results page displays possible solutions in the database.

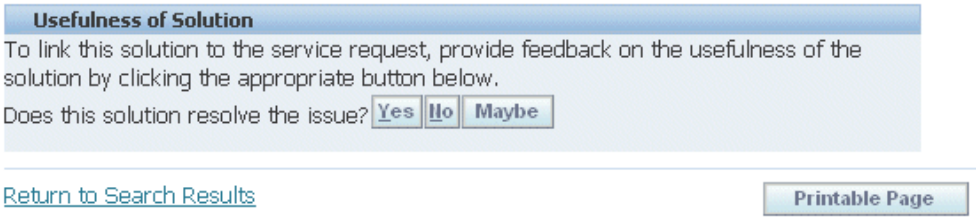


11. It looks like the hard drive hard drive may have to be replaced again, so Ms. Swanson selects the "Hard disk failure" solution to assess its usefulness.

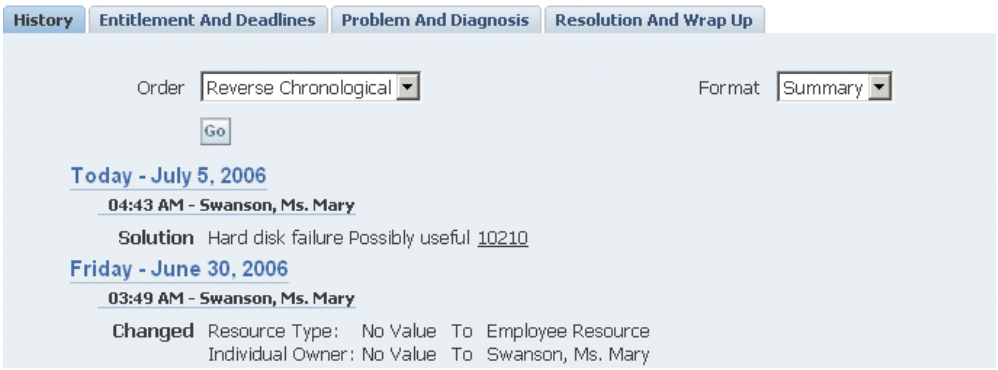
    The text of the solution displays.



12. Ms. Swanson decides that this solution may prove useful to the technician performing the repair, so she scrolls down to the bottom of the page and clicks **Maybe** in the Usefulness of Solution region.

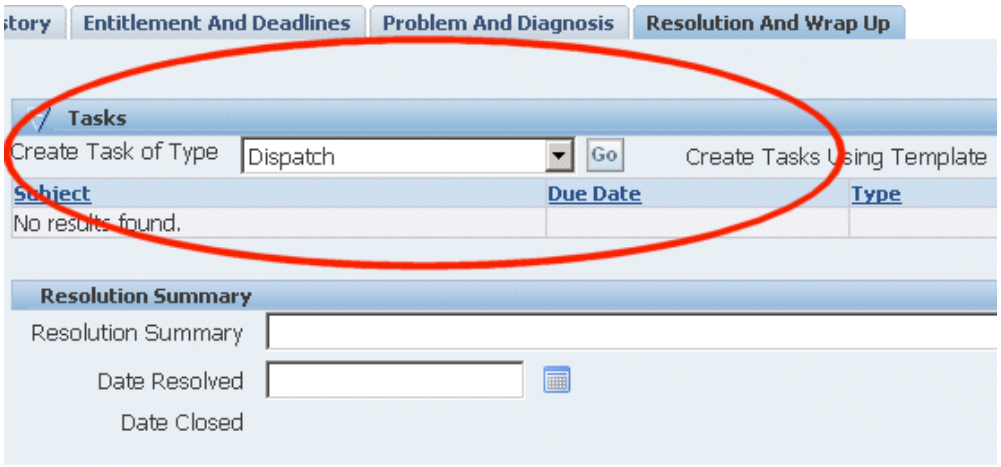


This action attaches the solution to the service request. A link to the suggested solution appears in the History tab of the service request.



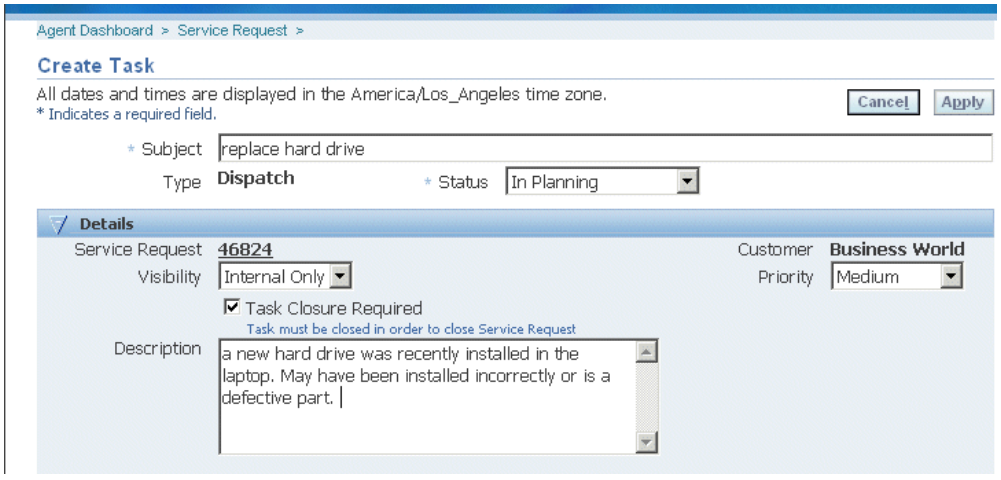
Ms. Swanson can also use InQuira Search to search for possible solutions to the hard disk failure problem. To use this knowledge base, the *Knowledge: Search to display for integrating applications* profile option must be set to *InQuira Search*.

13. Ms. Swanson is now ready to create the task for the field service technician to fix the computer. She chooses Dispatch from the Create Task of Type drop-down list and clicks **Go**. For more information, see Creating and Updating a Task, page 51-17.



Note: Your organization can set up task templates your agents can use to create tasks to solve common problems and you can have these tasks created automatically based on the service request type, problem code and other attributes. See Generating Tasks Automatically, page 25-1.

14. Ms. Swanson enters the task and description in the Create Task page and checks the Task Closure Required check box to ensure the service request is not closed before this task is completed.



15. Ms. Swanson clicks **Apply** to create the task and return to the service request.

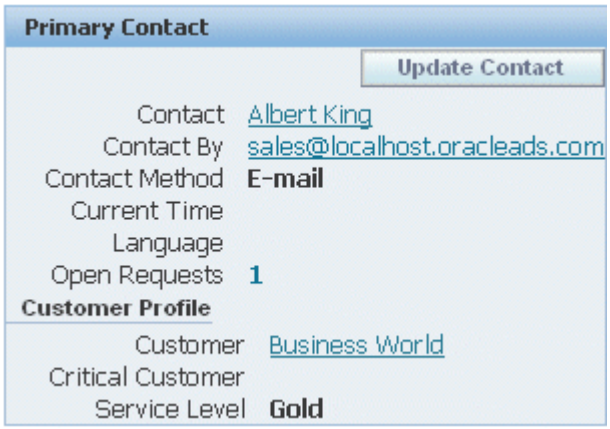
16. Ms. Swanson clicks the Interaction tab and views the following interactions and activities.

When	Interaction	Activity
Mr. Crilly creates the service request	Service request is created	Service Request Created
Ms. Swanson updates the service request	Service request is updated	Service Request Updated
Ms. Swanson adds a task on the service request	Task is created	A task is added

She notes down the Interaction ID, Customer Name, Agent, Reason, Result, Outcome, and Start and End Dates.

To display interactions and activities, the administrator sets the Service: Interaction Logging Mode profile to Log Interactions automatically. For more information, refer to Capturing and Displaying Interactions and Activities, page 46-1.

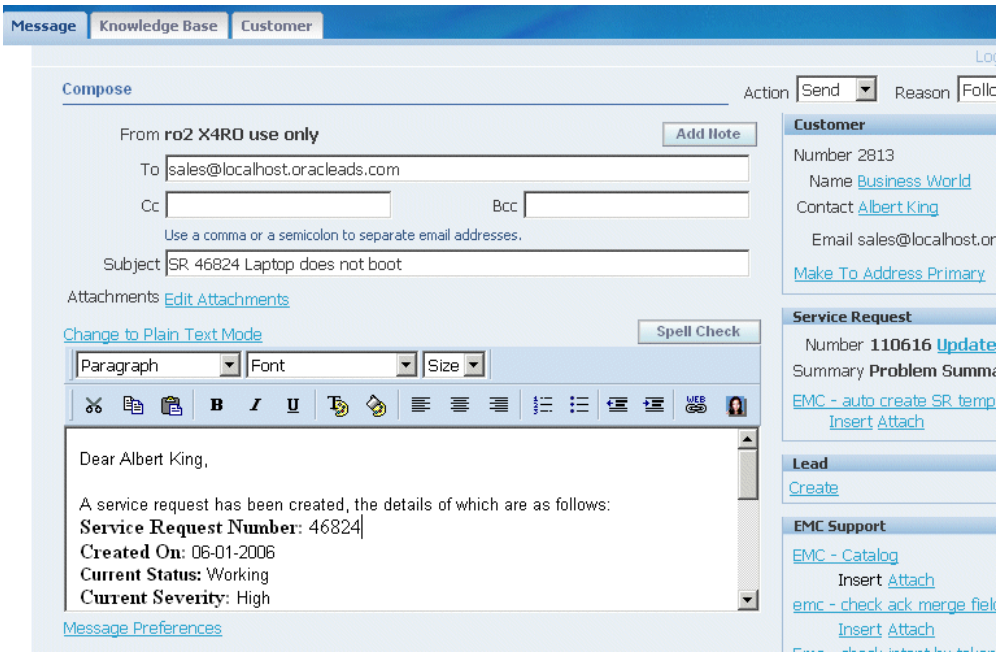
17. Ms. Swanson wants to send a brief e-mail to the customer about the action she has taken. To do so, she selects the e-mail address in the Primary Contact region.



18. The application opens up the Oracle Email Center Compose page.

The application automatically fills in the subject line of the e-mail with the service request number and the text in the summary field of the service request.

You can create templates that provide the text of the e-mail body with merge fields which automatically populate customer, contact, and service request information.



19. Ms. Swanson adds a few personal notes to the e-mail body and clicks **Go** at the top of the window to send the email.

Creating and Updating a Task

This topic details how Mary Swanson, support engineer in the laptop division, creates a task for the service request.

1. In the My Service Requests queue, Ms. Swanson goes to the service request created for Business World and clicks the summary to update the service request.

2. She clicks the Resolution and Wrap Up tab to create a task for the field service technician to fix the computer. Ms. Swanson can create the task by either selecting the type or selecting a task template. She chooses Dispatch from the Create Task of Type list and clicks **Go**

3. She sets the time zone to agent time zone to accurately identify the start and finish times for the job and the technician.

4. She enters "Replace hard drive" as the subject and the address of the place where the technician has to replace the hard drive in the address.

5. As replacing the faulty part may take approximately 2 hours, she enters 2 as the planned effort and selects hours from the list and changes the status of the task to Assigned.

Note: Since the profile, *Service: Disable manual scheduling of field service tasks* is set to *No*, Ms. Swanson selects the task status, task assignment status, assignee type, assignee, planned dates, schedule dates, actual dates, planned effort, actual effort, and duration

6. Since this is a field service task, Ms. Swanson wants to confirm if the customer will available during the time when the technician will be visiting. To seek customer confirmation, she ensures that confirmation is required before assigning a task to a technician.

7. Next she selects the Task Closure Required to ensure that the service request is not closed before this task is closed.

8. Next she assigns the task to Mr. Jansen, a technician belonging to the group " Employee Resource". As Mr. Jansen is already assigned another task during this time, the system throws a warning message.

   An assignee cannot be used for multiple task assignments if the *Service: Allow Multiple Booking of Tasks* profile is set to *No*.

9. Then she assigns the task to Mr. Fred Bramer, another technician belonging to the Employee Resource group and schedules the task in his queue.

   The resources displayed in the list are based on the value set in the *Service: Filter Task Assignee LOV by the Task Owner Group* profile. If this profile is set to *Yes*, the Assignee is filtered based on the owner group

10. Ms. Swanson clicks Save to save the task and return to the service request.

11. In the Update Service Request page, Ms. Swanson goes to the Resolution and Wrap Up tab and clicks the Update icon against the task to update the task

12. Ms. Swanson clicks the Parts tab to find if an order is placed for the hard drive. To place an order for the part, she clicks Create Parts Order. She searches for the required part in the inventory and creates a requirement for 1 hard drive and attaches this requirement to the task

13. She next updates the skills associated with this task. She selects Product Skill and selects "Knowledge about computers" from the list of skills.

14. She next views the access hours for the customer that are associated with field service tasks. Access hours are automatically generated for field service tasks based on the value in the *CSF: Automatic Association of Access Hours to Field Service Task* profile. She selects the After Hours check box to specify that the technician can also visit after hours.

15. She is now ready to save the task and clicks **Save**.

16. Next, Mr. Bramer opens the Agent Dashboard to view his work on hand. To view all his work assignment locations, he clicks Show Tasks on Map at the top of the My Tasks table. This displays the Google Map showing five locations with the respective tasks that are assigned to him.

17. He opens the first task in the update mode and accepts the new task assignment.

18. He views that the service request was logged for problem in booting the computer and the resolution is to replace the hard disk. He goes to the incident site to replace the hard drive and after completing the task, clicks the Debrief icon against the first task to add information about it.

    He enters data related to labor and expenses, and parts assigned for the task such as the condition of the parts assigned and updates the task status to Completed. Mr. Bramer will not be able to make any further updates to the task, as this status disables him from making any further changes to the task.

Searching Service Requests

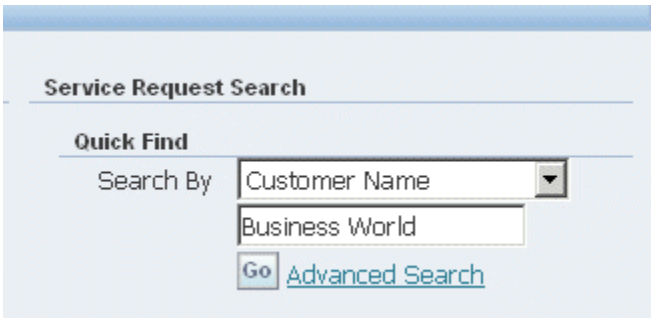
Customer Support offers agents multiple ways of searching for service requests from the Agent Dashboard.

This topic discusses:

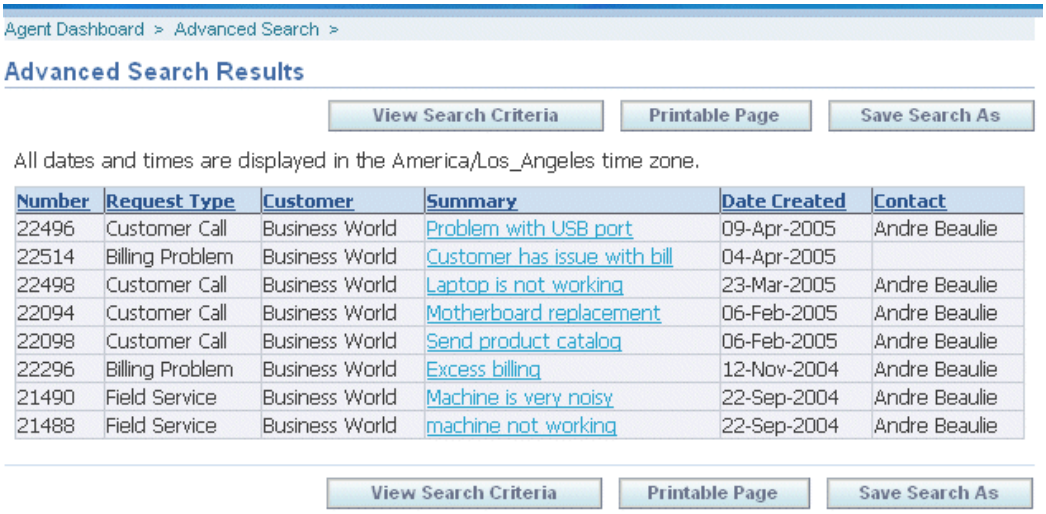
- Quick finds, page 51-19
- Advanced searches, page 51-20
- Saved searches, page 51-20
- Application Search, page 51-24

Quick Find

When a customer calls to inquire about the status of a service request and does not remember the service request number, agents can use Quick Find to locate it.



The application displays the results on the Advanced Search Results page.



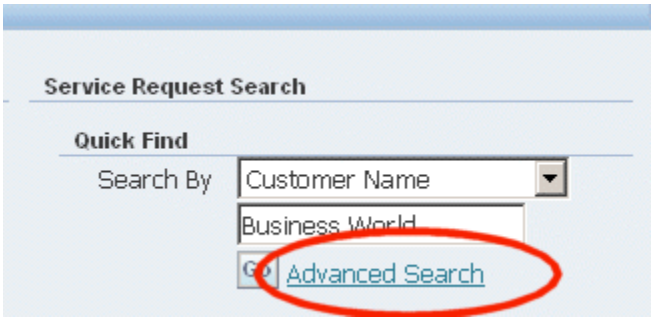
Available Quick Find search criteria include customer attributes, install base attributes, employee information, and project information. You can modify what search terms are available by modifying the lookup CSZ_SRCH_QUICKFIND_CODE. See Customer Support Lookups, page 43-30.

Advanced Searches

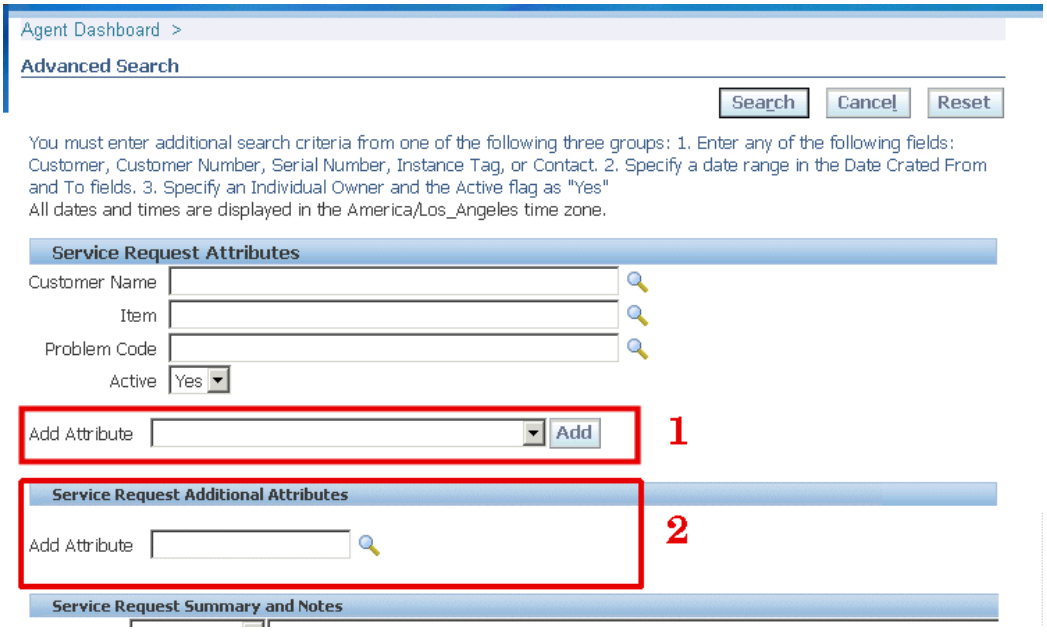
Advanced searches offer a wide variety of search criteria, including any extensible attributes you have set up to capture additional service request information.

For example, an agent can use advanced search to find all of the service requests for a customer created within the last week, all that have been escalated, or all that are in jeopardy (in danger of violating the applicable contract.)

To start an advanced search, select the Advanced Search link in below Quick Find.



On the Advanced Search page, some search criteria in the Service Request Attribute region appear as fields. Agents can add others using the Add Attribute drop-down list (highlighted as region 1 in the image below).

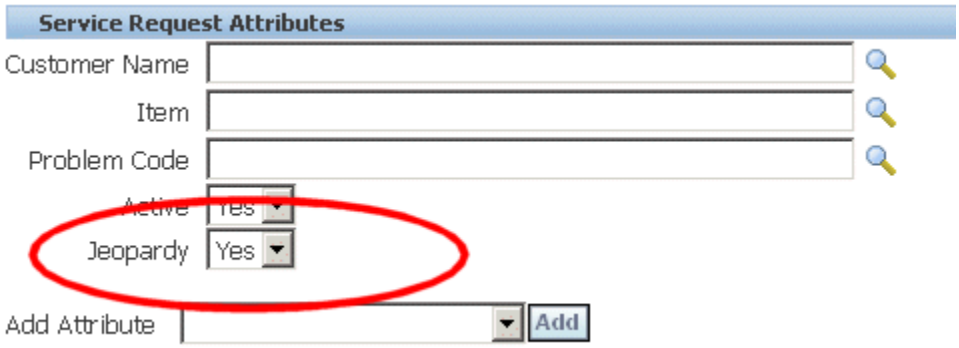


Using personalization, you can specify which criteria are available as fields and which agents must add using the Add Attribute list. See Personalizing the Advanced Search Page, page 43-20.

The Add Attribute list automatically includes a subset of the extensible attributes created for the service request. These indexed extensible attributes display with their attribute group display names hyphenated in front, for example: "Vehicles for Towing-Make". See Setting Up Attributes and Attribute Groups, page 45-9. You cannot expose or remove these through personalization.

Agents can search using other non-indexed extensible attributes using the Service Request Additional Attributes region (highlighted as region 2 above).

When an agent adds an attribute using the Add Attribute drop-down list, it appears as a field below the default search criteria (highlighted in the image below):



For a list of available search criteria see Available Search Criteria for Customer Support, page 43-45.

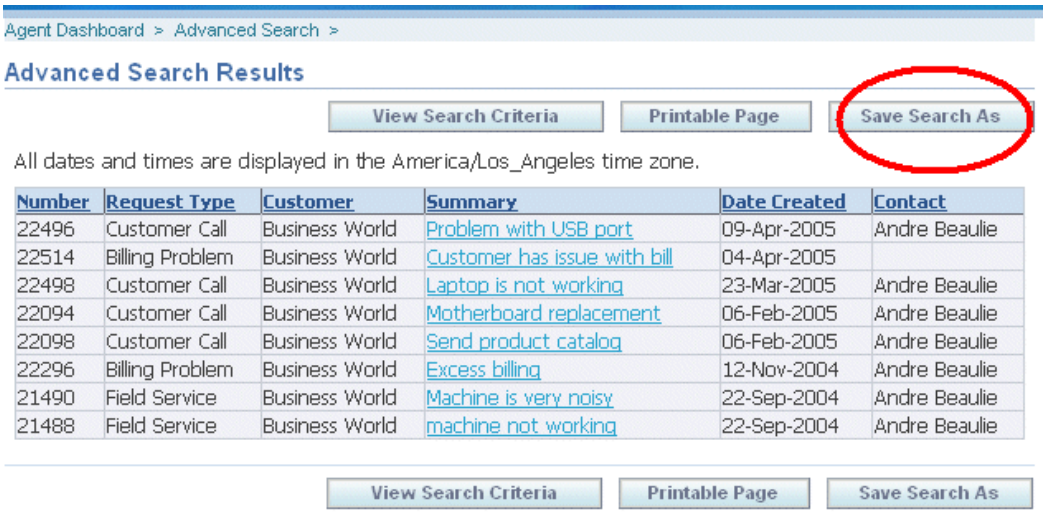
For performance reasons, the application requires agents to add search criteria from at least one of the following three groups:

1. Entry in Customer, Customer Number, Serial Number, Instance Tag, or Contact.
2. A date range in the Date Crated From and To fields.
3. Entry in the Individual Owner field and the Active flag as "Yes".

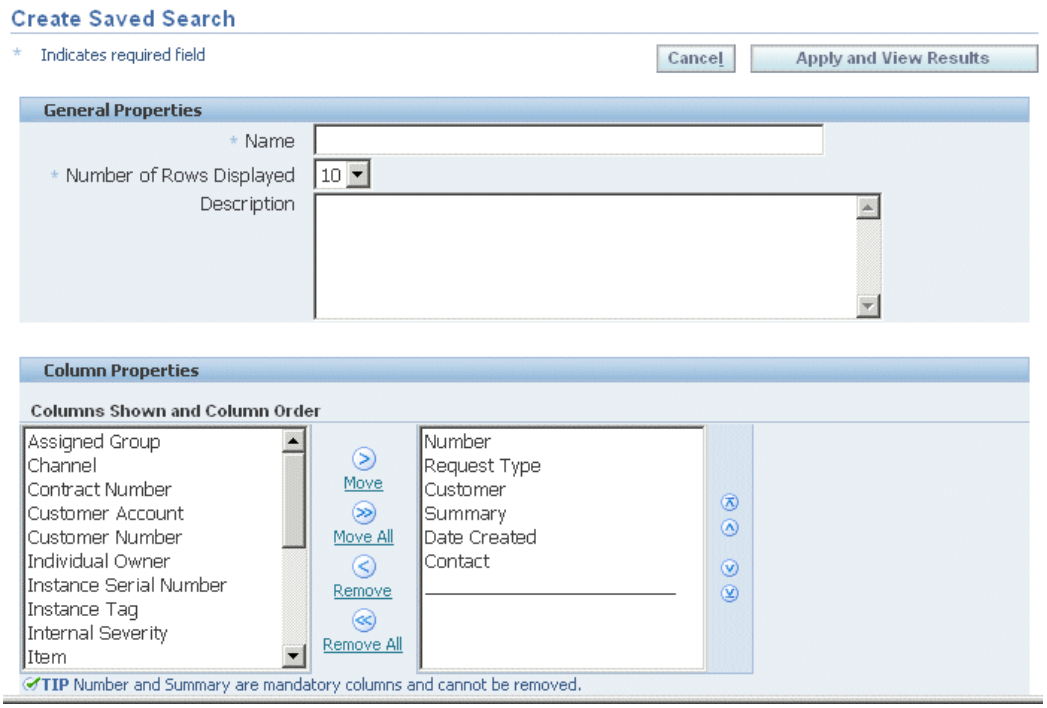
Saved Searches

Agents can save their advanced search criteria for reuse. They can use them to track service requests of a colleague who left on vacation, for example, or to track escalated service requests of their support group.

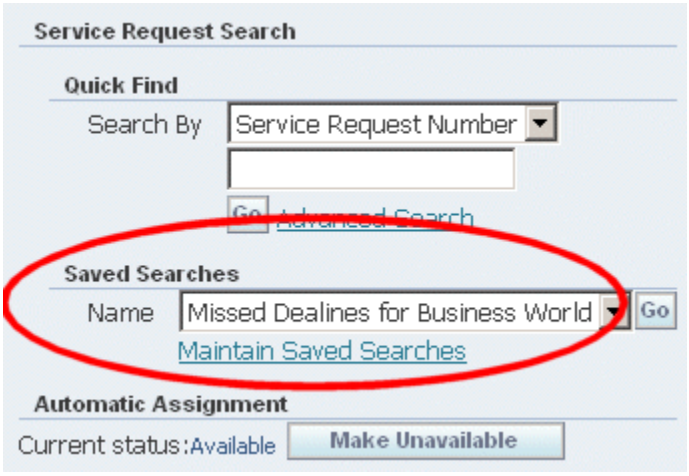
To create a saved search, perform an advanced search and click **Save Search As** on the results page or create a search from the Maintain Saved Searches page and save it. You can choose to associate the saved search criteria either with all users or with selected responsibilities. When you associate the search with all users or selected responsibilities, the search becomes centrally defined. In the former case, the search is displayed for all users but when you map the search only to certain responsibilities, then only users under that responsibility can view the search criteria.



The Create Saved Search page makes it possible for agents to name the search, modify the display of results, and change the search criteria themselves. (The image below shows only a part of the page).



Saved searches appear on the Agent Dashboard right underneath Quick Find.



Application Search

An agent can search for a service request from the Application Search region in the Agent Dashboard. The agent must select Service Request from the Enterprise Search LOV, enter a keyword, and click Go. The application displays the results on the Apps Search Results page. The agent can further narrow down the search by using the filter criteria provided. The agent can then click on the Service Request number, to view or update the service request details in the Update Service Request page.

Searching for Tasks

Task search offers a wide variety of search criteria to search for tasks related to a service request.

For example, an agent can use task search to find all tasks created within the last week or owned by Mary Swanson. Or the customer may call regarding tasks for service request 9909. The agent then clicks the Task Search link in the Agent Dashboard and enters 9909 as the service request number. All tasks pertaining to the service request are displayed in the results region.

To start Tasks Search, click the Task Search link in the Agent Dashboard. The Tasks Search page is displayed. You can search for tasks based on the following attributes:

- **Task Attributes**

  You can search for tasks based on most of the task details including the task type, service request number, task number, status, and priority. You can also view the parent task associated with a task, if any. You can also search on customer information related to a task including name, account, and number.

  You can select any of the following options to narrow the search results:

  - Show Only Open Tasks – Select this check box to display only tasks that are

open

- Show Only Escalated Tasks – Select this check box to display tasks that have been escalated. This is helpful in finding tasks on which immediate action is required.

- Show Tasks for Escalated Service Requests Only – Select this check box to find tasks only on service requests that have been escalated. The results may include open, closed, or escalated tasks.

- **Subject and Description**

  You can search for tasks based on the subject and description of the service request.

  For example, you can search for tasks related to the subject "Monitor not working". This may be helpful in identifying crucial tasks that were performed for resolving a service request in the past and using the same tasks to resolve the current service request.

- **Owner**

  You can find tasks based on the owner of the task. The owner may be yourself, your group or your team members, or your group or team. If you do not know the owner, you can also select the Any option.

- **Assignee**

  You can search tasks based on whom the task is assigned to. For example, if Mary Swanson is owner of tasks A, B, and C and she is on vacation from 12th to 20th July and has tasks that have been escalated and assigned to her, then you can select the Show Only Escalated Tasks option in the Task Attributes section and then select Others in the Assignee region and the type as Employee Resource and enter Ms. Swanson, Mary as the Name.

- **Task Dates**

  You can find tasks based on a specified duration. You can use the planned, scheduled and actual start and end dates to search for tasks.

Saving Task Search

Agents can save the advanced search criteria for reuse. They can use them to track tasks created for a specific customer or for an item, or to the person to whom the task was assigned, or tasks created during a specific period.

To create and save task search criteria, click **Create Saved Search** on the Agent Dashboard or perform an advanced search and click **Save Search As** on the results page.

Creating Escalations

An escalation is a process used to highlight or flag certain issues within an organization, so that appropriate personnel can respond to these situations and monitor the resolutions. Escalations occur in support centers for a variety of reasons. It enables an organization to identify, track, monitor, and manage situations that require increased awareness and swift action.

You can manually escalate a business problem to the appropriate level where it can be solved. You can manage situations that require awareness and possible actions. An escalation is managed either by creating an escalation document, or by assigning an escalation owner, or by defining the actions needed to resolve the escalation.

For example, Mary Swanson, a support engineer, receives a call from Cindy Miller, a primary contact for Business World, complaining that their hardware problems are not completely fixed. Ms. Swanson finds the service request, creates an escalation document, and also reassigns herself as the owner for this document. She specifies the degree of urgency through the escalation level, links the relevant documents and contacts for the escalation and creates tasks to get the escalation resolved.

An escalation request can be initiated on behalf of a customer, an employee, or other involved party.

To initiate an escalation, you must:

- Accept a request for an escalation
- Review the situation
- Create an escalation document
- Notify the involved parties (this is performed automatically)

1. Open the service request that you want to escalate in the Update Service Request page. Click the Service Request Escalation button or select Service Request Escalation from the Actions menu. The Create Escalation page appears
2. Select or enter the following information in the Escalation Details region:
    - Escalation Summary - A brief description of the escalation.
    - Level - Indicates the escalation level. Level 2 being the highest severity.
    - Owner Type - The owner type can be an employee resource or a group resource.
    - Owner - Based on the owner type, select the owner for the escalation.
    - Status - The status of the escalation can be open, closed, and working.

- Reason - The reason why the customer wants to escalate the service request.
- Target Date - The date by which the escalation is to be worked on.

3. Specify the following information (if they are not automatically displayed) in the Service Request Attributes region:
   - Status - The status of the service request
   - Severity - The severity of the service request
   - Urgency - The degree of urgency of the service request

   Note: You must have the appropriate information entered into the Reference Documents and Contacts tab before you can assign an owner.

4. In the Contacts tab:
   1. Enter the contact information (customer or employee).
   2. Specify if the contact is a requester and if the escalation is for notification purposes.
   3. Enter the contact point types for the selected employee or customer

5. Enter the relevant information related to the reference document in the Reference Documents tab. A reference document is a document that is linked to an escalation document. For example, a service request (number 9229) is escalated to Jane Doe in escalation document (number 11749). The service request (number 9229) is a reference document. You can add more than one reference document to an escalation.

6. (Optional) Select the Audit tab to view all the changes once you are finished.

7. Save the escalation, and make a note of the escalation number. The level of escalation displays as a hyperlink in the Update Service Request page and on the Agent Dashboard under the My Service Requests, and the My Group Owner Service Requests regions. You can access the escalation document from the Escalation Level hyperlink.

   After the escalation is created, you can update the escalation level, other escalation details including the owner, type, status, reason, and change the contact information, add reference documents in the Update Escalation page.

   If you want to change the status of the escalation to Closed, the level of escalation must be de-escalated or the escalation document must be deleted. When an

escalation is closed, the service request is open for creating of a fresh escalation.

52

Service Desk User Procedures

This chapter covers the following topics:

- About the Sample Service Desk User Procedures
- Creating a Service Request
- Resolving the Service Request
- Creating and Updating a Task
- Searching Service Requests
- Searching for Tasks

About the Sample Service Desk User Procedures

Because user procedures vary greatly from implementation to implementation, Oracle cannot provide step by step end-user help for the Service Desk module.

Instead, this chapter uses examples to provide application implementers and administrators with an introduction to typical user procedures for creating and resolving a service request and for searching in the Service Desk module of Oracle TeleService.

The example details how the support organization for the fictitious Vision Enterprises handles a problem on a field office e-mail server.

Vision Enterprises resolves employee problems in two steps:

1. A support representative logs the problems first and verifies the employee information.

2. The application then assigns the service request to the appropriate support group for resolution.

The support organization assigns work to the different support groups based on service territories and leaves it up to the agents to determine what they want to work on next. Agents can choose to work on any item in either their personal work queue or in the

unassigned work queue.

In this section you can learn about:

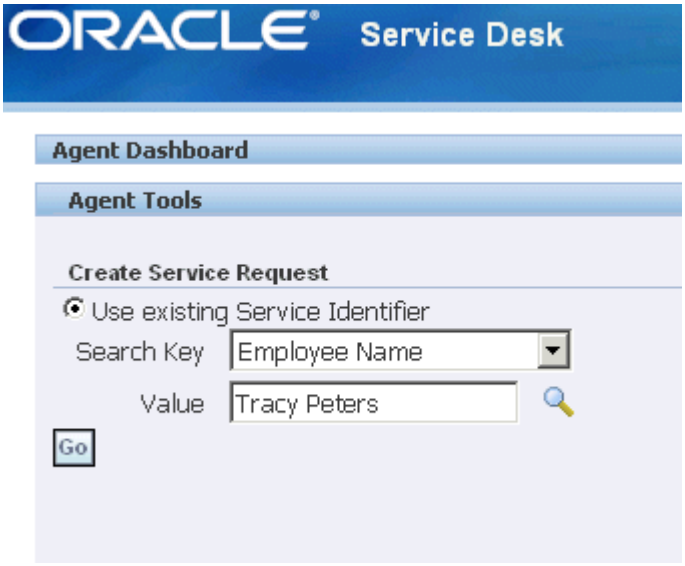
- Creating a service request, page 52-2
- Resolving the service request, page 52-7
- Searching service requests, page 52-19

Creating a Service Request

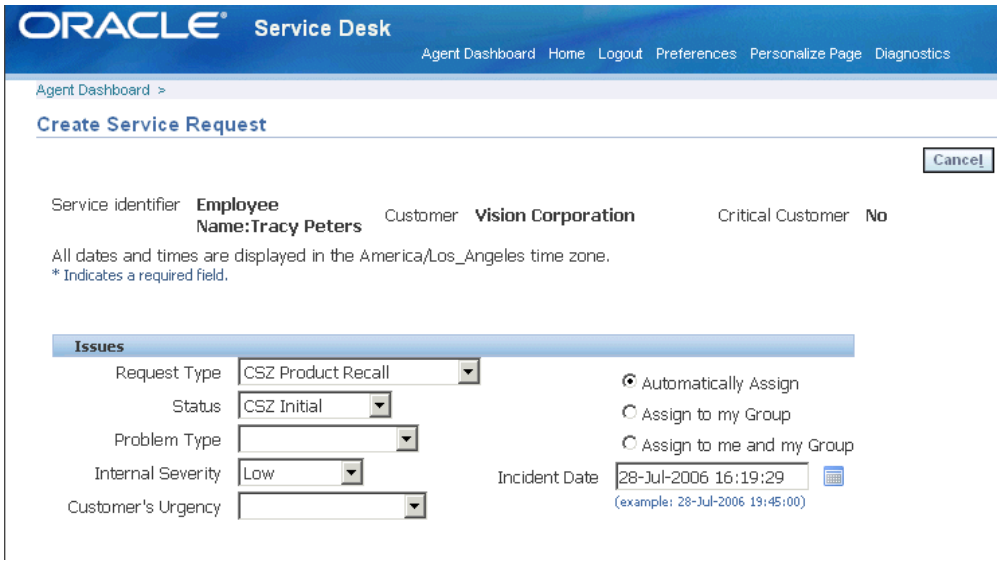
This example illustrates the creation of a service request for an existing install base item.

1. Tracy Peters, a database administrator for a field office, calls to report that users cannot receive e-mail apparently because of a faulty e-mail server.

2. Support agent Ted Crilly chooses Employee Name as the search key in the Create Service Request region of the Agent Dashboard, enters the employee's name, and clicks **Go**.

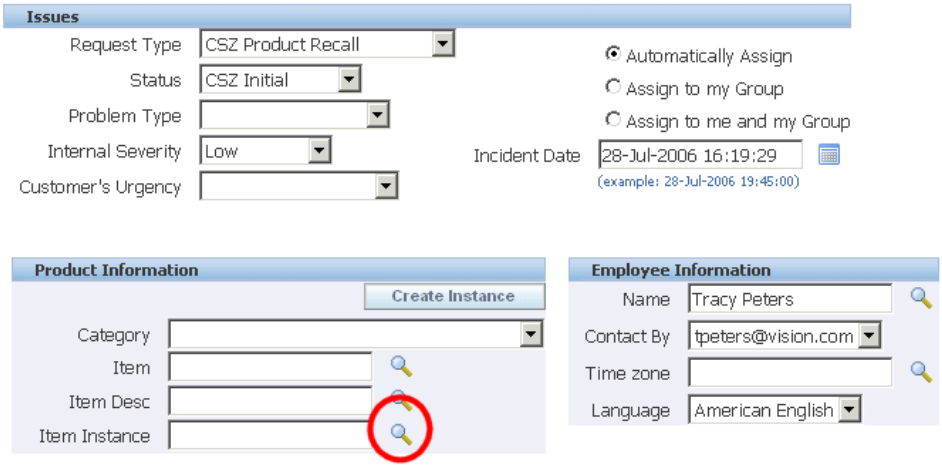


3. The Create Service request page opens.

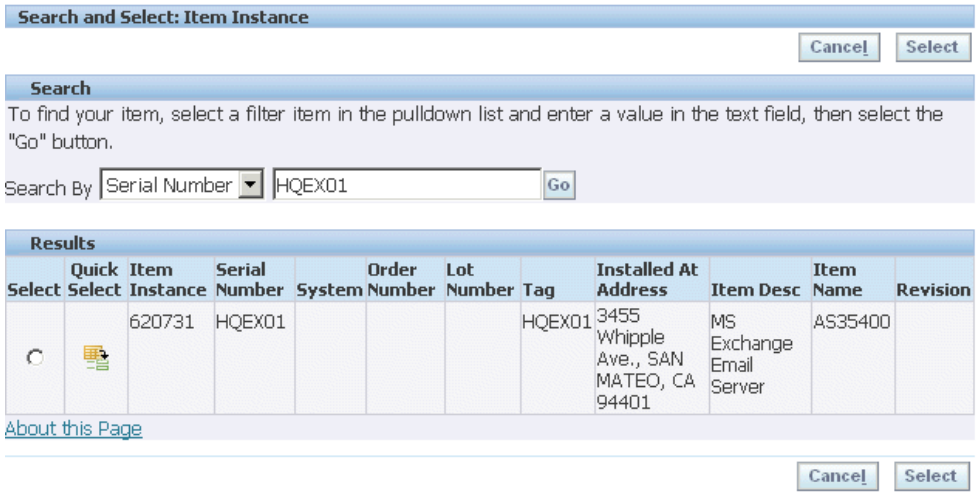


4. Ms. Peters gives support agent Crilly the unit's serial number.

5. To enter the item instance using the serial number, Mr. Crilly clicks **Search** next to the Item Instance field (highlighted in the image below).

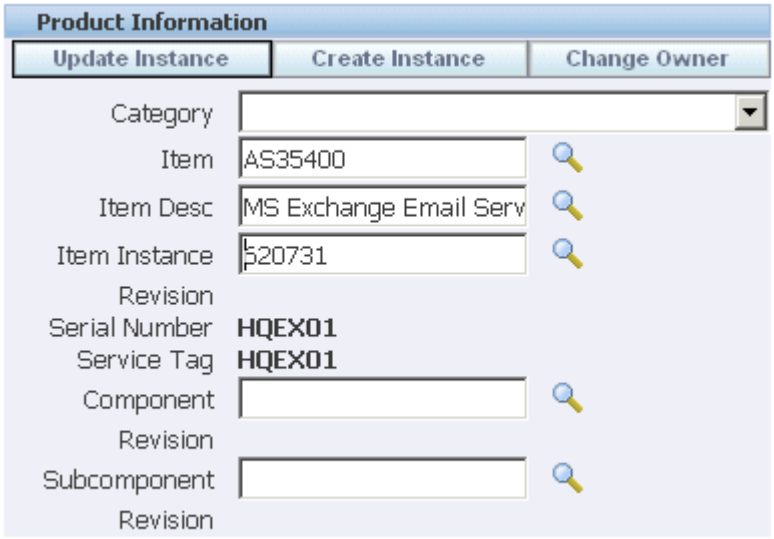


6. In the list of value window, he chooses Serial Number as the search key and enters the unit's serial number "HQEX01" for the search.If the Services: Check for Similar Service Requests profile is set to Yes, then a page displays similar requests that have HQEX01 as the serial number.



7. Clicking **Quick Select** populates the Product Information on the Create Service Request page.

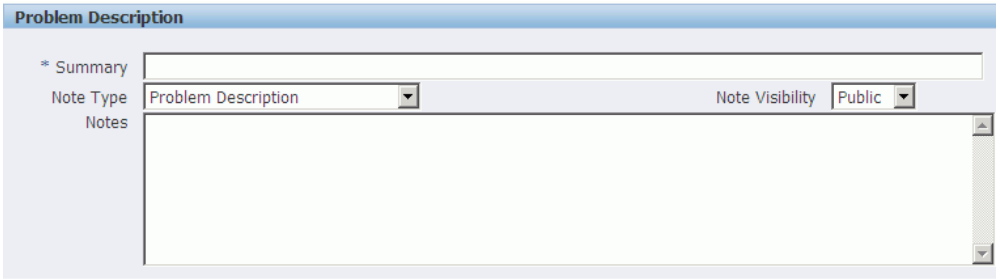
> **Note:** Your application may display different information depending on your implementation. For example, the application displays different information if the item is an Oracle Install Base instance, an Oracle Enterprise Asset Maintenance asset, or an inventory item that is not tracked by either application. Clicking on the Graphical View button will display a graphical representation of the item instance relationship.



8. In the Product Information region, Mr. Crilly enters Boston Manufacturing as the expenditure organization. He next selects the project number 5476, and "Move hard drive" as the project name. He then associates project task number 6810, and project task name "contact transporter" to the service request.

9. The agent returns to the Create Service Request page and enters the problem summary "Cannot receive e-mails" into the Summary field chooses "Server Problem " as the note type and retains "Public" as the note visibility. Mr. Crilly classifies the employee problem as a "Technical Problem" using the Request Type list in the Issues Region.

    Note: : The default Note Type and Visibility are set in the profiles Service: Default New Note Type and Note: Default Note Status respectively. Mr. Crilly can change these values, if needed while creating the service request.



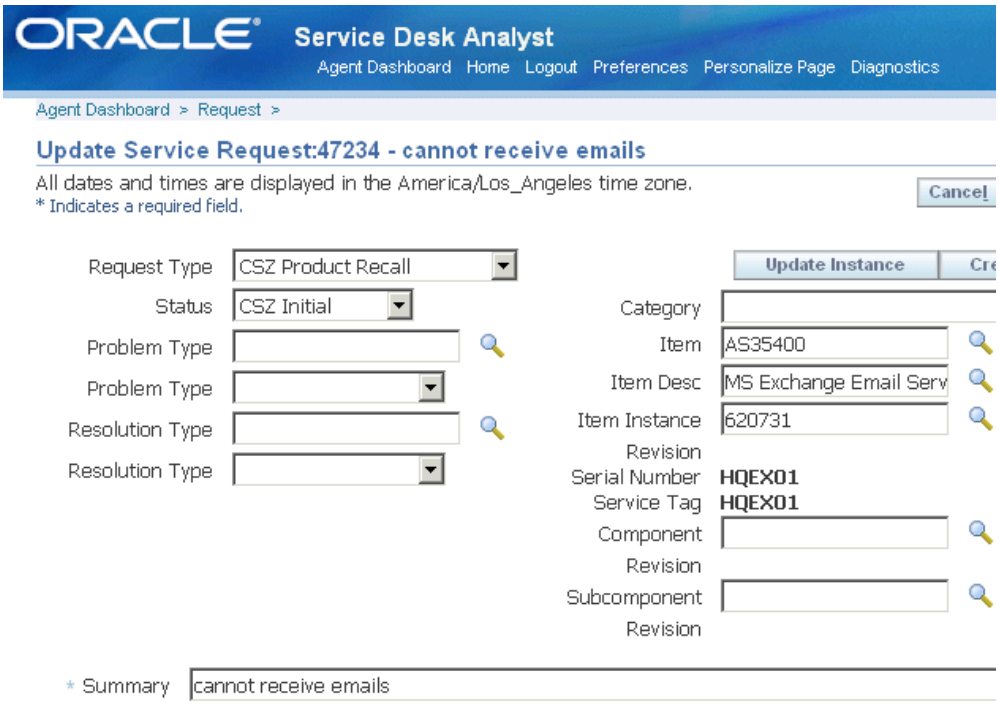
10. Mr. Crilly views Ms. Peters' contact information, the contact type, name of the contact, the contact's complete phone number with the country code and extension, the time zone of the contact, and the preferred language. The agent verifies that Ms. Peters' contact information is correct by clicking the **Update Contact** button. The Party Information page appears with the contact details.

    Note: The Contact field can be made mandatory while creating the service request by setting the profile Service: Make Contact Mandatory to Yes.

    Note: Mr. Crilly can also click the envelope icon next to Ms. Peter's email address, if email is the chosen method of contacting her.

11. The agent is now ready to save the new service request. When the agent saves the service request, if the Services: Check for Duplicate Service Requests profile is set to Yes, then all requests that are a duplicate of this request are displayed in a separate page.

12. The selection of the option in the Issues Region determines how the application assigns the service request after it is saved.



The Assign Automatically option causes the application to assign the service request to the appropriate support group or to a specific agent, depending on how you set up your work assignment and distribution. If the *Service: Real-Time Automatic Assignment of Service Requests in Agent-Facing Applications* profile is set to *Yes*, then the Assign Automatically option is selected by default but if the profile is set to *No*, then the default value is Assign Manually. Agents can change the assignment mode.

Alternately, the agent can keep possession of the service request by choosing Assign to me and My Group option or keep ownership in her support group by choosing Assign to My Group, or may want to assign the service request manually to some other agent by choosing Assign Manually option.

If the assignment mode is manual, then the default values for Assigned Group and Individual Owner are displayed from the profiles *Service: Default Group Owner for Service Requests* and *Service: Default Service Request Owner* respectively, if they are defined.

13. Next, Mr. Crilly checks the entitlements in the Deadlines region. The application displays entitled service contracts for the server and provides the contractual response and resolution date, so Mr. Crilly can inform Mr. King when to expect the problem to be resolved.

14. Clicking **Apply** creates the new service request and triggers the assignment process.

15. The application automatically opens the new service request in the Update Service Request page.

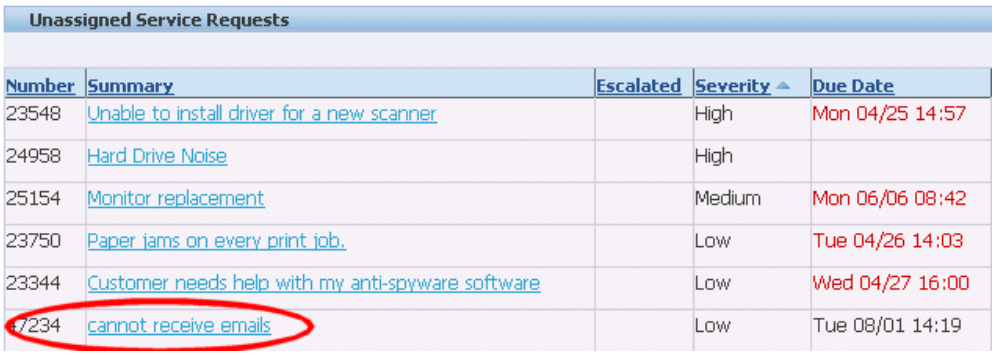
16. Because the service request is resolved by a different agent, Mr. Crilly clicks **Cancel** to return to the Agent Dashboard.

> **Note:** You can have the employee automatically notified by e-mail that the service request has been created. See Setting Up Notifications, page 21-1. If you have implemented Oracle iSupport, employees can view the service request on their support portal.

Resolving the Service Request

This topic details how Mary Swanson, a support engineer for the corporate e-mail system, resolves the service request.

1. Checking the Unassigned Work queue, Ms. Swanson sees that a new service request has been created.



Unassigned Service Requests

Number	Summary	Escalated	Severity	Due Date
23548	Unable to install driver for a new scanner		High	Mon 04/25 14:57
24958	Hard Drive Noise		High	
25154	Monitor replacement		Medium	Mon 06/06 08:42
23750	Paper jams on every print job.		Low	Tue 04/26 14:03
23344	Customer needs help with my anti-spyware software		Low	Wed 04/27 16:00
7234	cannot receive emails		Low	Tue 08/01 14:19

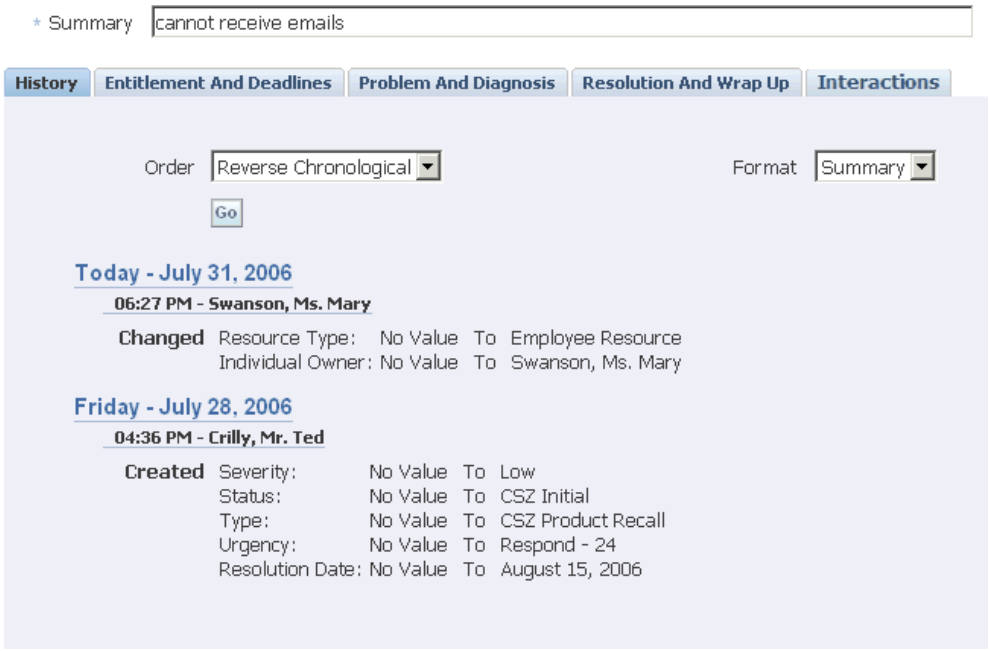
2. Her first action is to assign the service request to herself by selecting the **Accept** icon to the right of the service request (highlighted in the image below). Assigning the request to herself assures that nobody else in her support organization tries to update the service request at the same time.

Medium	Mon 06/06 08:42	Vision Corporation	Support Agents Group	
Low	Tue 04/26 14:03	Vision Corporation	Support Agents Group	
Low	Wed 04/27 16:00	Vision Corporation	Support Agents Group	
Low	Tue 08/01 14:19	Vision Corporation	Support Agents Group	

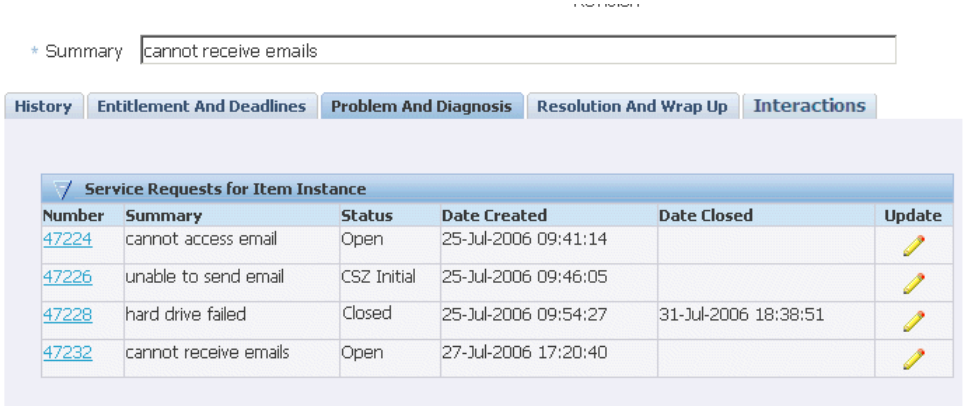
3. The service request opens in the Service Request Update page.

4. Ms. Swanson clicks the Dashboard tab to check for any open tasks on the service request

5. On the History tab Ms. Swanson can see that the service request was created by agent Ted Crilly.

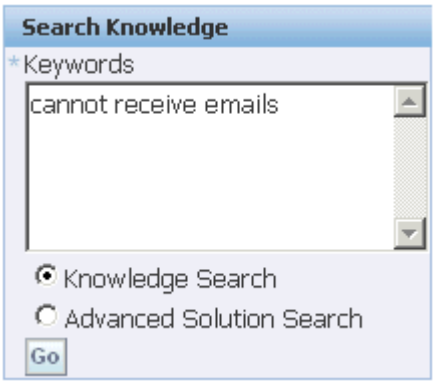


6. On the Problem And Diagnosis tab, she notices that this server has recently had its hard drive replaced.

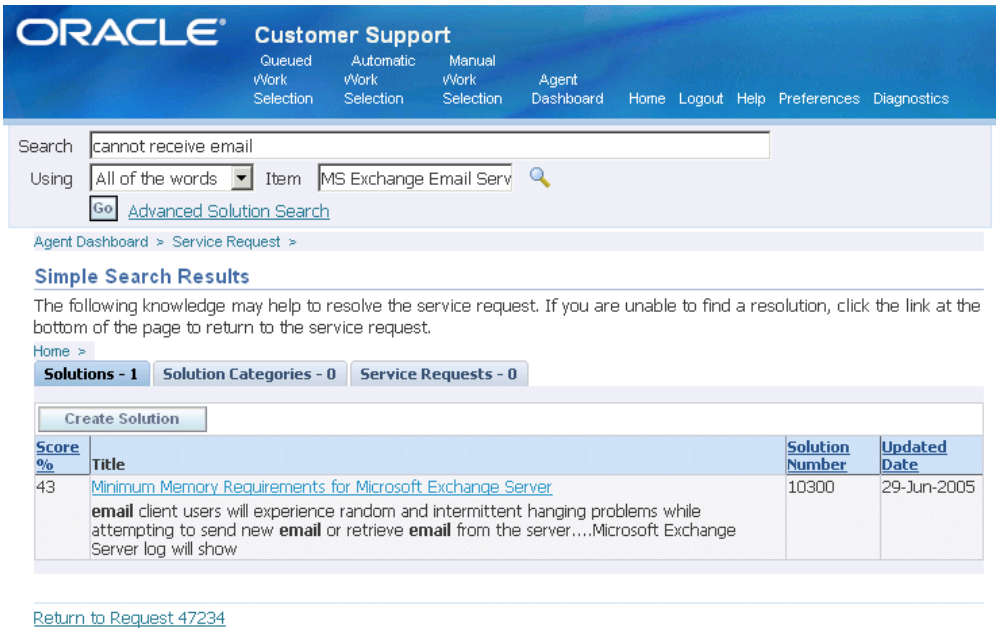


7. In the Related Service Requests region, she notices that the service request is linked to another service request where the SR number is 53245, Summary is "Overload crashes e-mail", type is "Server Problem", and status is "Open". If the service request is in a status that does not allow any updates to the service request, then Ms. Swanson will not be able to update it. For more information, see Service Request Statuses, page 7-2

8. Ms. Swanson decides to search the knowledge base for possible solutions by clicking **Go** in the Search Knowledge region.



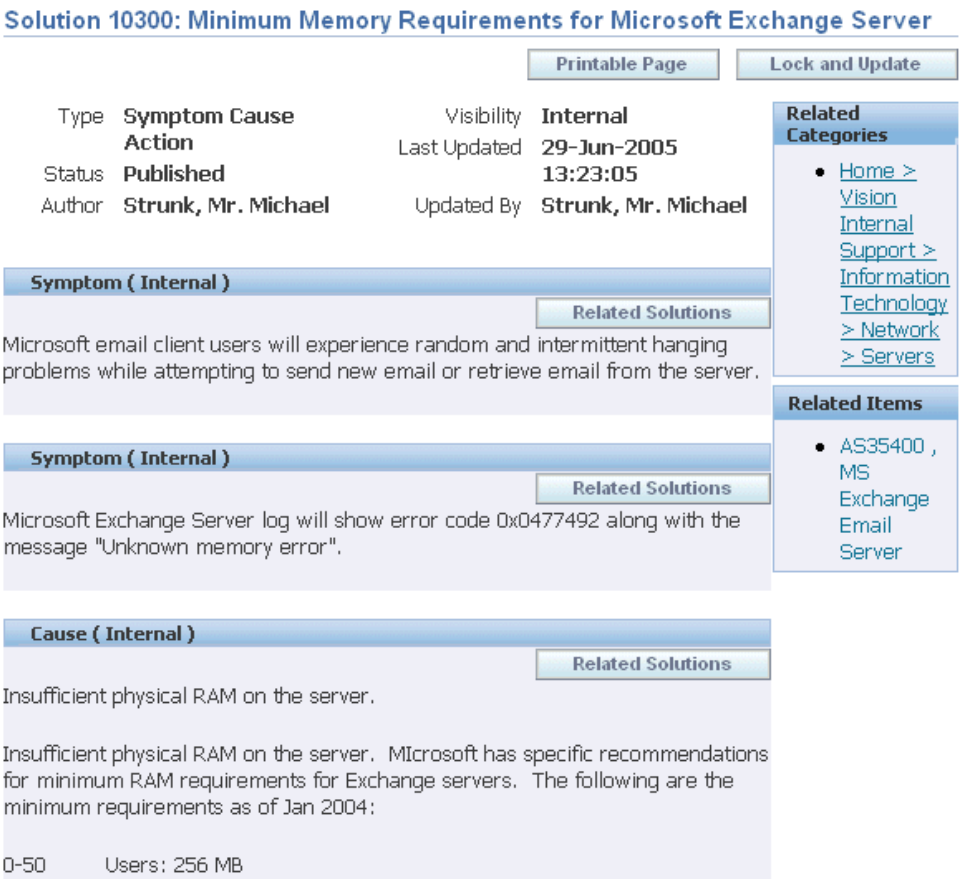
9. The Simple Search Results page displays possible solutions in the database.



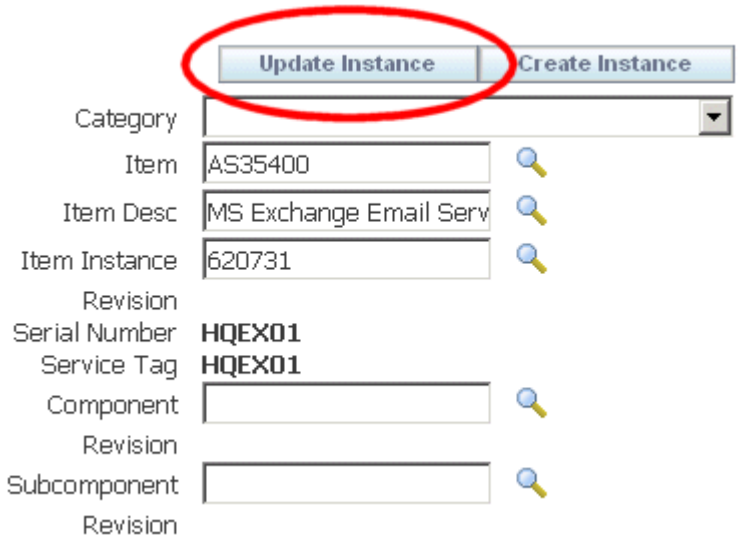
10. The displayed knowledge base solution summary suggests this may be a virtual memory problem. Ms. Swanson decides to view the solution in detail and assess its usefulness.

    She clicks the solution link and the text of the solution displays.

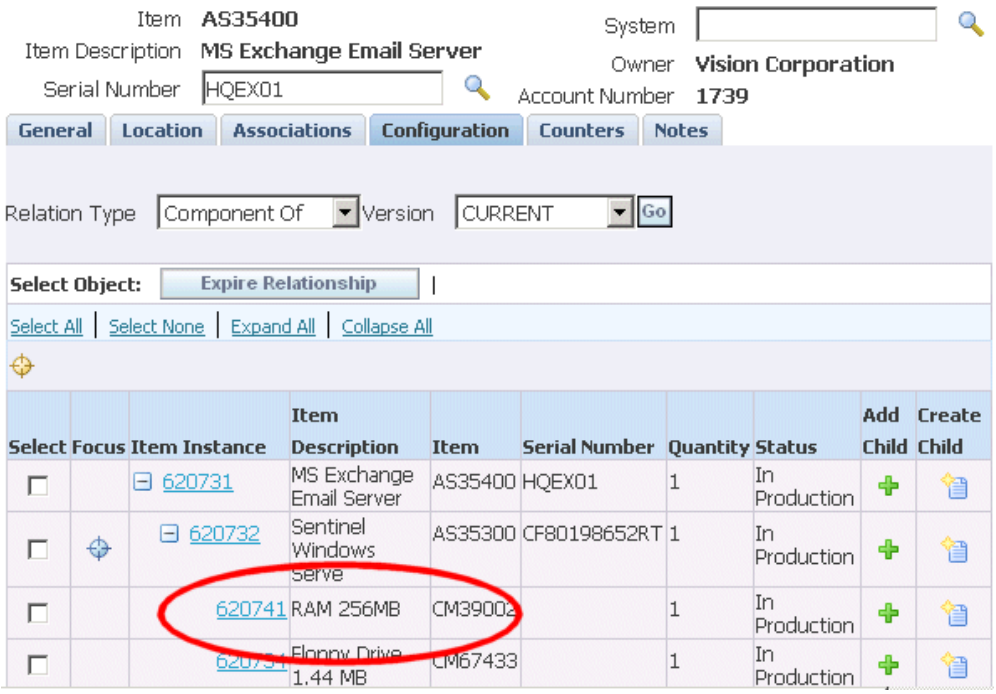
    The solution stipulates at least 500 megabytes of memory for an organization with 50 to 100 employees. Ms. Peter's office has almost 100 users.



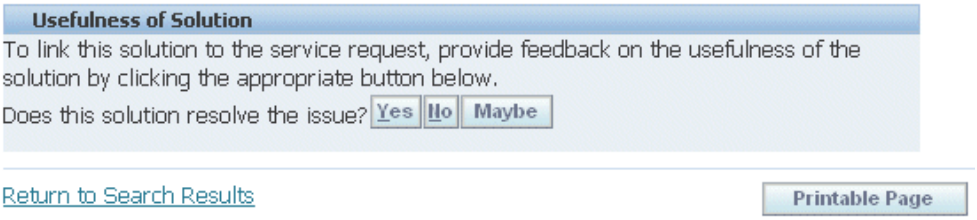
11. Ms. Swanson decides to check the server's configuration to see if the available memory meets this requirement. To do so, she returns to the Service Request Update page and clicks **Update Instance** (the button highlighted in the image below).



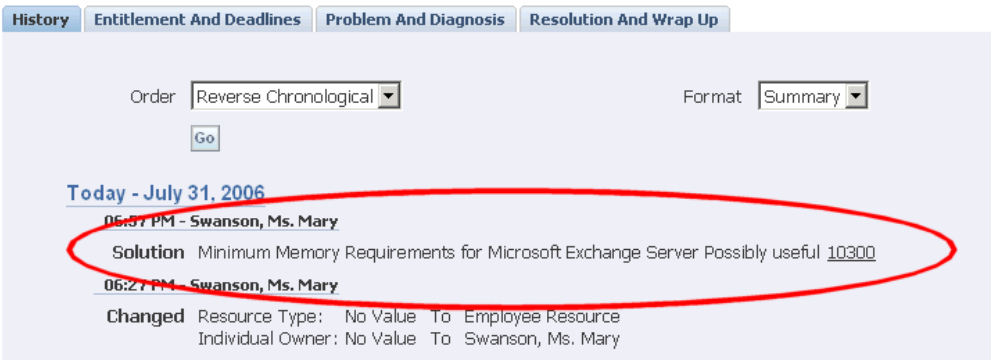
12. The Oracle Install Base record shows that the server has only 256 megabytes of memory.



13. Ms. Swanson decides that this solution may prove useful to resolve this problem, so she scrolls down to the bottom of the page and clicks **Maybe** in the Usefulness of Solution region.



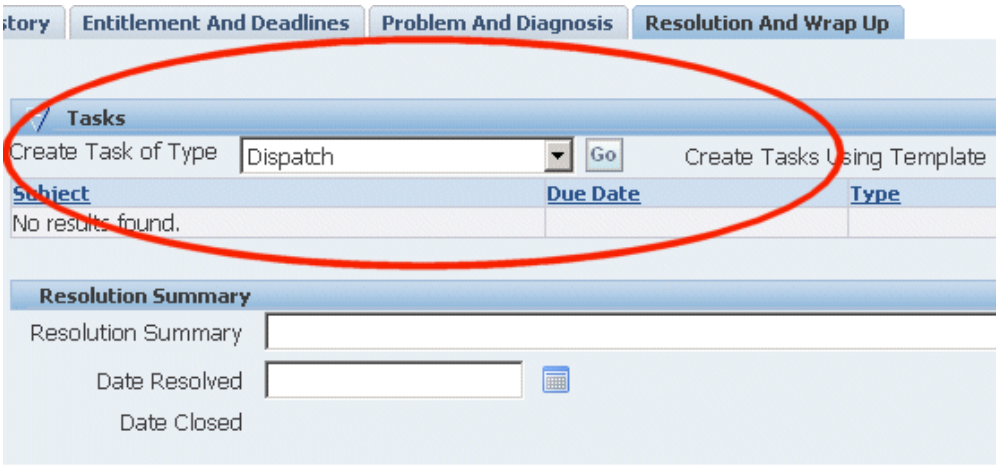
This action attaches the solution to the service request. A link to the suggested solution appears in the History tab of the service request. She can also view details related to tasks created for the service request.



14. Because the field office does not have its own technicians on site to fix this type of problem, Ms. Swanson decides to dispatch one by creating a dispatch task.

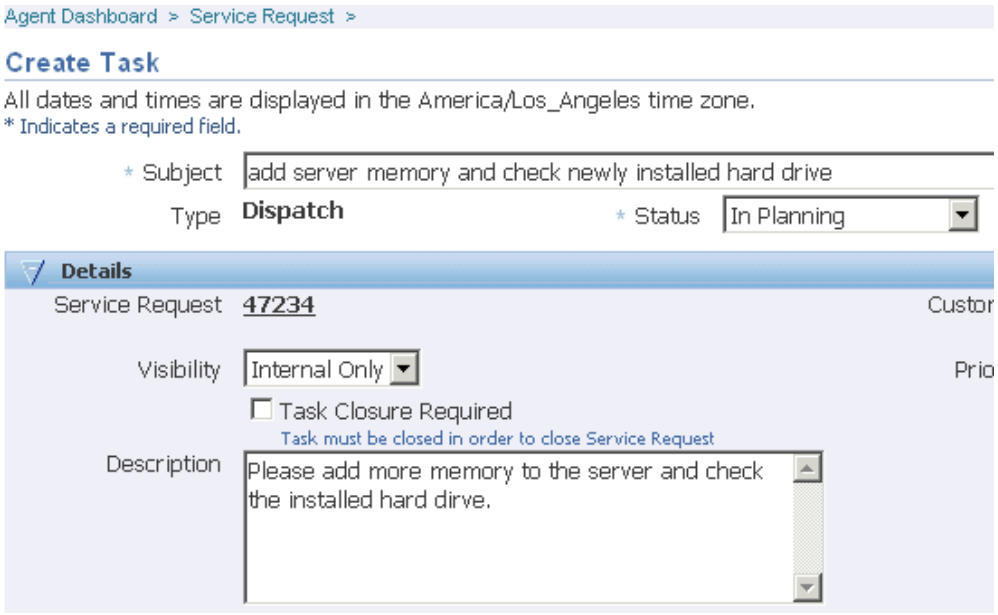
> **Note:** If you require management approval, before equipment upgrades are made, for example, you can automatically trigger an approvals process when an agent sets the service request to a specific status. The service request become read only until the approval request is accepted or rejected. See the Electronic Approvals and Records, page 19-1.

Ms. Swanson chooses Dispatch from the Create Task of Type drop-down list and clicks **Go**.



Note: Your organization can set up task templates your agents can use to create tasks to solve common problems and you can have these tasks created automatically based on the service request type, problem code and other attributes. See the Generating Tasks Automatically, page 25-1.

15. Ms. Swanson enters the task and description in the Create Task page and selects the Task Closure Required check box to ensure the service request is not closed before this task is completed. For more information, see Creating and Updating a Task, page 52-17.



16. Ms. Swanson clicks **Apply** to create the task and return to the service request.

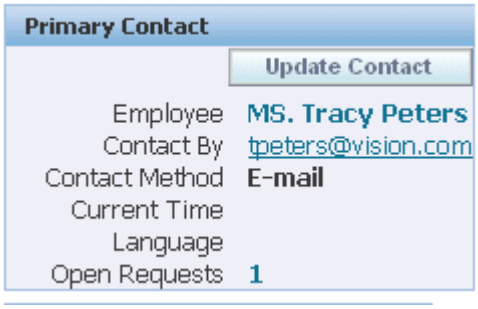
17. . Ms. Swanson clicks the Interaction tab and views the following interactions and activities.

When	Interaction	Activity
Mr. Crilly creates the service request	Service request is created	Service Request Created
Ms. Swanson updates the service request	Service request is updated	Service Request Updated
Ms. Swanson updates the instance details	Service request is updated	Service Request Updated
Ms. Swanson adds a task on the service request	Task is created	A task is added

She notes down the Interaction ID, Customer Name, Agent, Reason, Result, Outcome, and Start and End Dates.

To display interactions and activities, the administrator sets the Service: Interaction Logging Mode profile to Log Interactions automatically. For more information, refer to Capturing and Displaying Interactions and Activities, page 46-1.

18. Ms. Swanson wants to send a brief e-mail to the customer about the action she has taken. To do so, she selects the e-mail address in the Primary Contact region.

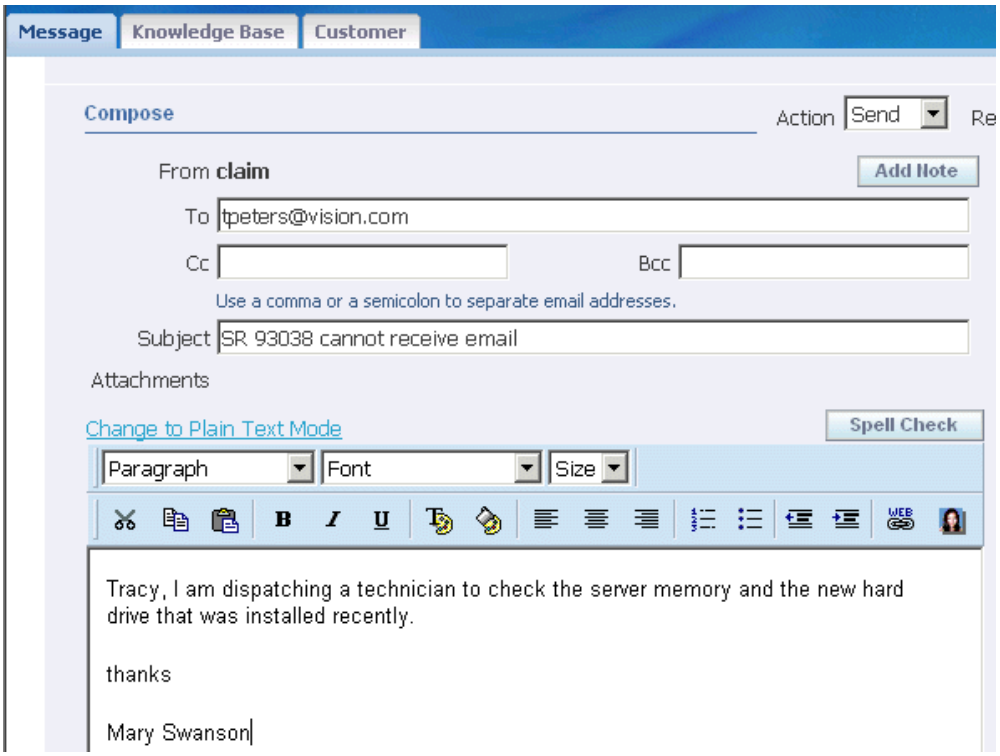


> **Note:** She can also send an email to the service request contacts by clicking the envelope icon next to the email address, if email is the chosen method of contact.

19. The application opens up the Oracle Email Center Compose page.

    The application automatically fills in the subject line of the e-mail with the service request number and the text in the summary field of the service request.

    You can create templates that provide the text of the e-mail body with merge fields which automatically populate customer, contact, and service request information.



20. Swanson types the body of the e-mail and clicks **Go** at the top of the window to send it.

Creating and Updating a Task

This topic details how Mary Swanson, a support engineer for the corporate e-mail system, creates and updates a task for the above service request.

1. Ms. Swanson clicks the Tasks tab in the Agent Dashboard to view the tasks assigned to her and her group and accepts the tasks that are assigned to her.

2. She clicks the Resolution and Wrap Up tab to create a task for the field service technician to add server memory and check the newly installed hard drive. Ms. Swanson can create the task by either selecting the type or selecting a task template. She chooses Dispatch from the Create Task of Type list and clicks **Go**.

3. She sets the time zone to agent time zone to accurately identify the start and finish times for the job and the technician.

4. She enters "Add server memory and check newly installed hard drive" as the subject and a brief description about the task.

5. As the task may take approximately 2 hours, she enters 2 as the planned effort and

selects hours from the list and changes the status of the task to Assigned.

> **Note:** Since the profile, *Service: Disable manual scheduling of field service tasks* is set to *No*, Ms. Swanson selects the task status, task assignment status, assignee type, assignee, planned dates, schedule dates, actual dates, planned effort, actual effort, and duration.

6. Since this is a field service task, Ms. Swanson wants to confirm if the customer will available during the time when the technician will be visiting. To seek customer confirmation, she ensures that confirmation is required before assigning a task to a technician.

7. Next she selects the Task Closure Required to ensure that the service request is not closed before this task is closed.

8. . She assigns the task to Mr. Jansen, a technician belonging to the group "Employee Resource". As Mr. Jansen is already assigned another task during this time, the system throws a warning message.

   An assignee cannot be used for multiple task assignments if the *Service: Allow Multiple Booking of Tasks* profile is set to *No*.

9. Then she assigns the task to Mr. Fred Bramer, another technician belonging to the Employee Resource group and schedules the task in his queue.

   The resources displayed in the list are based on the value set in the *Service: Filter Task Assignee LOV by the Task Owner Group* profile. If this profile is set to *Yes*, the Assignee is filtered based on the owner group.

10. Ms. Swanson clicks Save to save the task and return to the service request.

11. In the Update Service Request page, Ms. Swanson again goes to the Resolution and Wrap Up tab and clicks the Update icon against the task to update the task.

12. Ms. Swanson clicks the Parts tab to find if an order is placed for the hard drive. To place an order for the part, she clicks Create Parts Order. She searches for the required part in the inventory and creates a requirement for 1 hard drive and attaches this requirement to the task

13. She next updates the skills associated with this task. She selects Product Skill and selects "Knowledge about computers" from the list of skills.

14. She next views the access hours for the customer that are associated with field service tasks. Access hours are automatically generated for field service tasks based on the value in the *CSF: Automatic Association of Access Hours to Field Service Task* profile. She selects the After Hours check box to specify that the technician can also visit after hours.

15. She is now ready to save the task and clicks Save.

16. Next, Mr. Bramer opens the Agent Dashboard to view his work on hand. To view all his work assignment locations, he clicks Show Tasks on Map at the top of the My Tasks table. This displays the Google Map showing five locations with the respective tasks that are assigned to him.

17. He opens the first task in the update mode and accepts the new task assignment.

18. He views that the service request was logged for problem in receiving emails and the resolution is to check the server memory and the new hard drive. He goes to the incident site to check the hard drive and after completing the task, clicks the Debrief icon against the first task to add information about it.

    He enters data related to labor and expenses, and parts assigned for the task such as the condition of the parts assigned and updates the task status to Completed. Mr. Bramer will not be able to make any further updates to the task, as this status disables him from making any further changes to the task.

Searching Service Requests

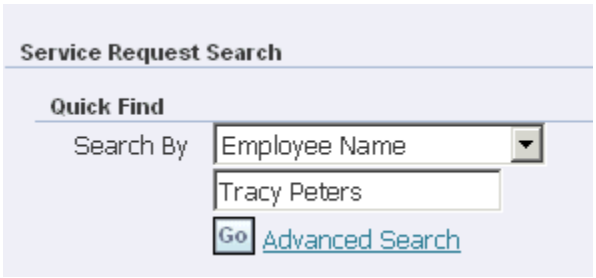
Service Desk offers agents multiple ways of searching for service requests from the Agent Dashboard.

This topic discusses:

- Quick finds, page 52-19
- Advanced searches, page 52-20
- Saved searches, page 52-22
- Application Search, page 52-24

Quick Find

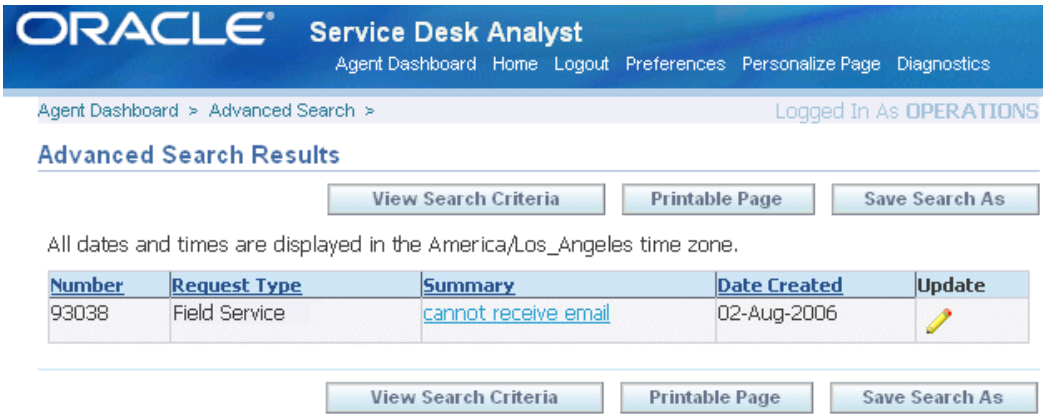
When an employee calls to inquire about the status of a service request and does not remember the service request number, agents can use Quick Find to locate it.



You can search by:

- Employee Email
- Employee Name
- Employee Number
- Project Number
- Serial Number
- Service Tag
- System
- Service Request Number

The application displays the results on the Advanced Search Results page.

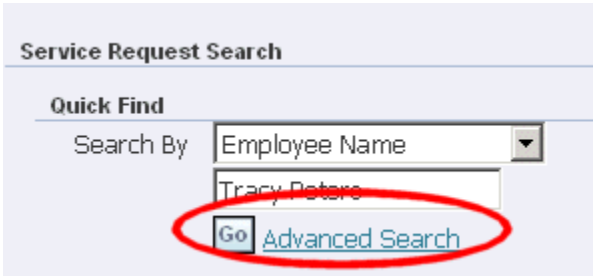


Advanced Searches

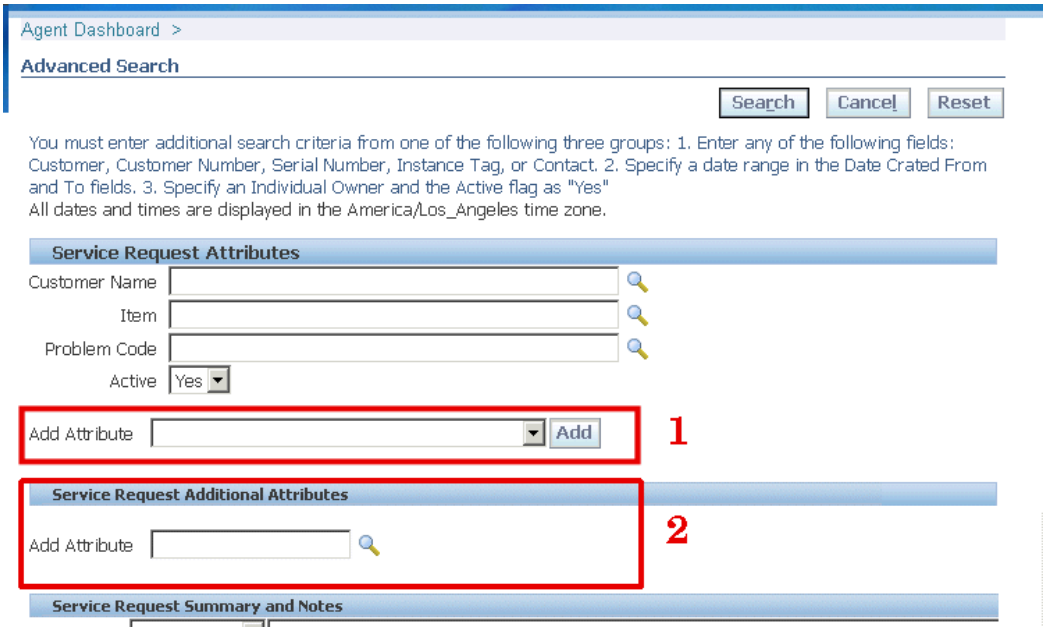
Advanced searches permit complex searches with additional search criteria. For example, an agent can find all of the service requests for a customer created within the last week, all that have been escalated, or all that are in jeopardy (in danger of violating the applicable contract).

Agents can also use an advanced search to track all service requests owned by a colleague who is away on vacation, for instance.

To start an advanced search, select the Advanced Search link below Quick Find.



On the Advanced Search page, some search criteria in the Service Request Attribute region appear as fields. Agents can add others using the Add Attribute drop-down list (highlighted as region 1 in the image below).

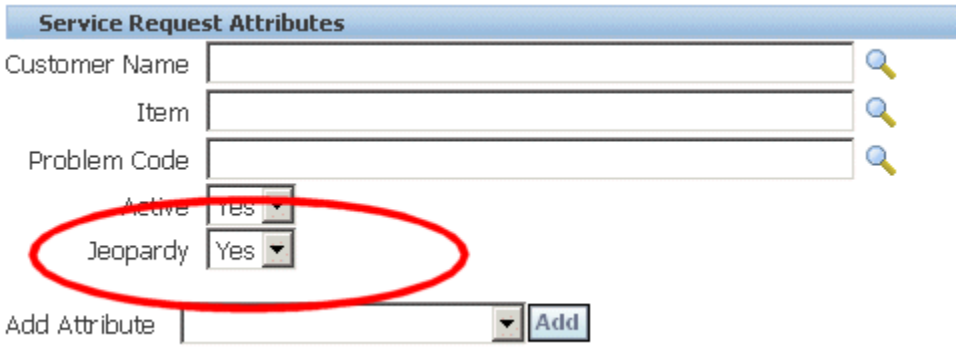


Using personalization, you can specify which criteria are available as fields and which agents must select using the Add Attribute list. See Personalizing the Advanced Search Page, page 43-20.

The Add Attribute list automatically includes a subset of the extensible attributes created for the service request. These indexed extensible attributes display with their attribute group display names hyphenated in front, for example: "Vehicles for Towing-Make". See Setting Up Attributes and Attribute Groups, page 45-9. Administrators cannot expose or remove these through personalization.

Agents can search using other non-indexed extensible attributes using the Service Request Additional Attributes region (highlighted as region 2 above).

When an agent adds an attribute using the Add Attribute drop-down list, it appears as a field below the default search criteria (highlighted in the image below):



(For a complete list of search criteria please see Available Search Criteria for Service Desk, page 43-49.)

For performance reasons, the application requires you to use criteria from at least one of the following three groups:

1. Enter any of the following fields: Customer, Customer Number, Serial Number, Instance Tag, or Contact.

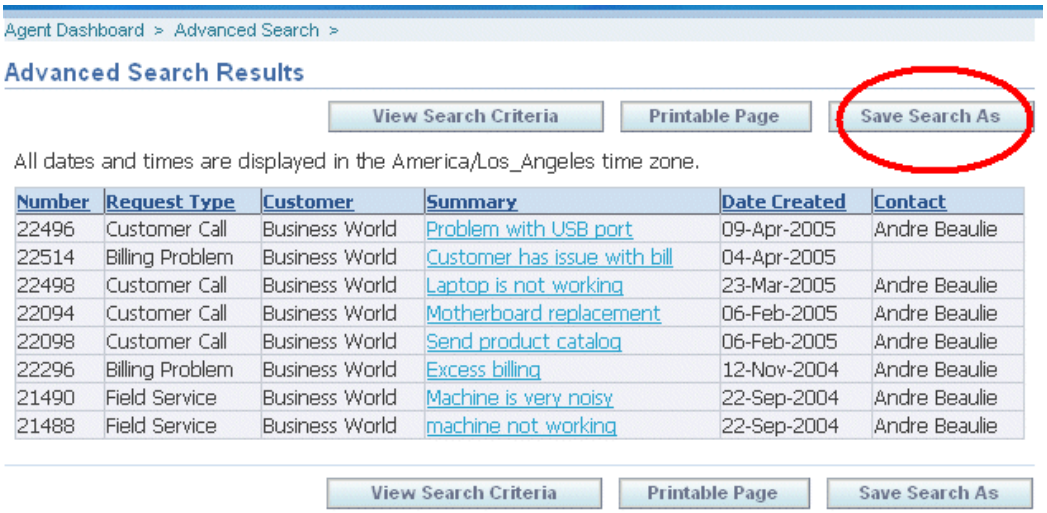
2. Specify a date range in the Date Crated From and To fields.

3. Specify an Individual Owner and the Active flag as "Yes".

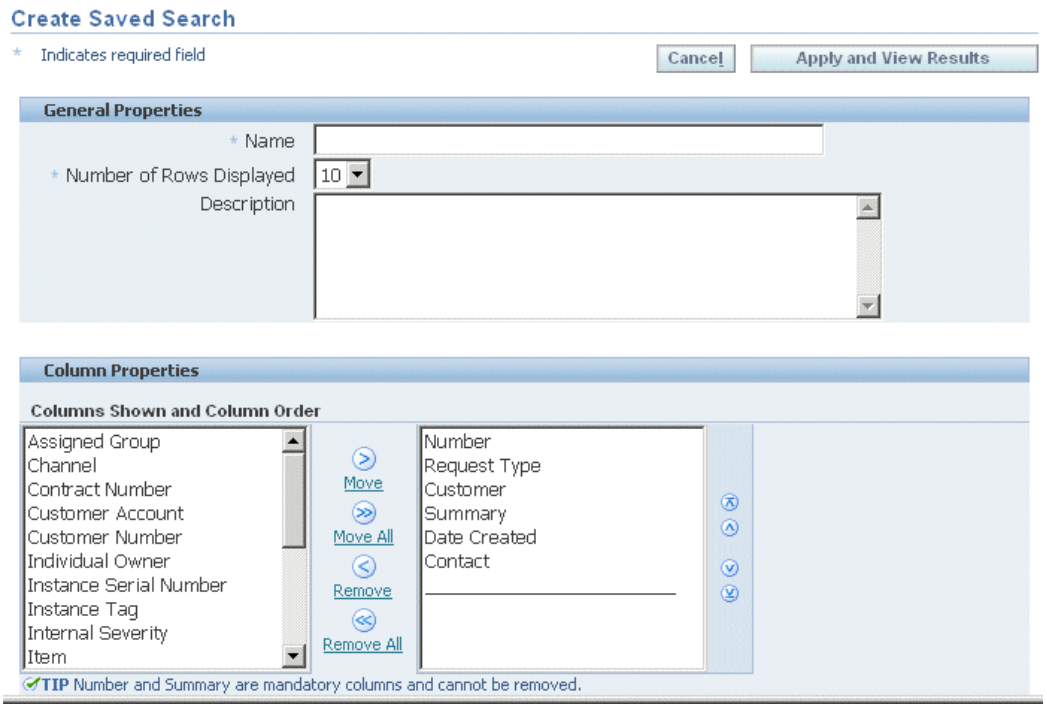
Saved Searches

You can save your advanced search criteria for reuse. Agents can use saved searches to track service requests of a colleague who left on vacation, for example, or to track escalated service requests of their support group.

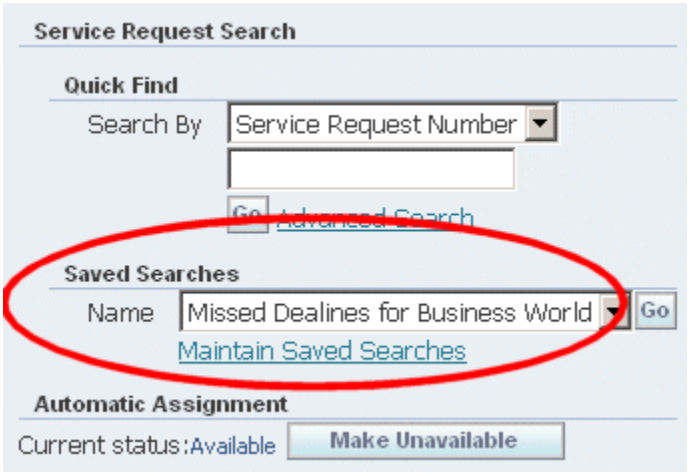
To crate a saved search, perform an advanced search and click Save Search As on the results page. You can also save the search criteria from the Maintain Saved Searches page and save it. You can choose to associate the saved search criteria either with all users or with selected responsibilities. When you associate the search with all users or selected responsibilities, the search becomes centrally defined. In the former case, the search is displayed for all users but when you map the search only to certain responsibilities, then only users under that responsibility can view the search criteria.



The Create Saved Search page makes it possible for you to not only name the search, but to modify the display of results and the search criteria themselves. The image below shows part of the page only.



Saved searches appear on the Agent Dashboard right underneath Quick Find.



Application Search

An agent can search for a service request from the Application Search region in the Agent Dashboard. The agent must select Service Request from the Enterprise Search LOV, enter a keyword, and click Go. The application displays the results on the Apps Search Results page. The agent can further narrow down the search by using the filter criteria provided. The agent can then click on the Service Request number, to view or update the service request details in the Update Service Request page.

Searching for Tasks

Task search offers a wide variety of search criteria to search for tasks related to a service request.

For example, an agent can use task search to find all tasks created within the last week or owned by Mary Swanson. Or the customer may call regarding tasks for service request 9909. The agent then clicks the Task Search link in the Agent Dashboard and enters 9909 as the service request number. All tasks pertaining to the service request are displayed in the results region.

To start Tasks Search, click the Task Search link in the Agent Dashboard. The Tasks Search page is displayed. You can search for tasks based on the following attributes:

- **Task Attributes**

  You can search for tasks based on most of the task details including the task type, service request number, task number, status, and priority. You can also view the parent task associated with a task, if any. You can also search on customer information related to a task including name, account, and number.

  You can select any of the following options to narrow the search results:

  - Show Only Open Tasks – Select this check box to display only tasks that are

open

- Show Only Escalated Tasks – Select this check box to display tasks that have been escalated. This is helpful in finding tasks on which immediate action is required.

- Show Tasks for Escalated Service Requests Only – Select this check box to find tasks only on service requests that have been escalated. The results may include open, closed, or escalated tasks.

- **Subject and Description**

  You can search for tasks based on the subject and description of the service request.

  For example, you can search for tasks related to the subject "Monitor not working". This may be helpful in identifying crucial tasks that were performed for resolving a service request in the past and using the same tasks to resolve the current service request.

- **Owner**

  You can find tasks based on the owner of the task. The owner may be yourself, your group or your team members, or your group or team. If you do not know the owner, you can also select the Any option.

- **Assignee**

  You can search tasks based on whom the task is assigned to. For example, if Mary Swanson is owner of tasks A, B, and C and she is on vacation from 12th to 20th July and has tasks that have been escalated and assigned to her, then you can select the Show Only Escalated Tasks option in the Task Attributes section and then select Others in the Assignee region and the type as Employee Resource and enter Ms. Swanson, Mary as the Name.

- **Task Dates**

  You can find tasks based on a specified duration. You can use the planned, scheduled and actual start and end dates to search for tasks.

Saving Task Search

Agents can save the advanced search criteria for reuse. They can use them to track tasks created for a specific customer or for an item, or to the person to whom the task was assigned, or tasks created during a specific period.

To create and save task search criteria, click **Create Saved Searc**h on the Agent Dashboard or perform an advanced search and click **Save Search As** on the results page.

53

Case Management User Procedures

This chapter covers the following topics:

- About the Sample Case Management User Procedures
- Creating a Case
- Searching Cases
- Creating and Updating a Task
- Searching for Tasks

About the Sample Case Management User Procedures

Because user procedures and user interface configurations vary greatly from implementation to implementation, Oracle cannot provide end-user help for Case Management.

This chapter uses an example to provide application implementers and administrators with an introduction to typical user procedures for creating and resolving cases.

The example details how the fictitious Vision Enterprises creates a case to track a security breach at an airport.

The topics covered include:

- Creating a case, page 53-1
- Searching cases, page 53-13

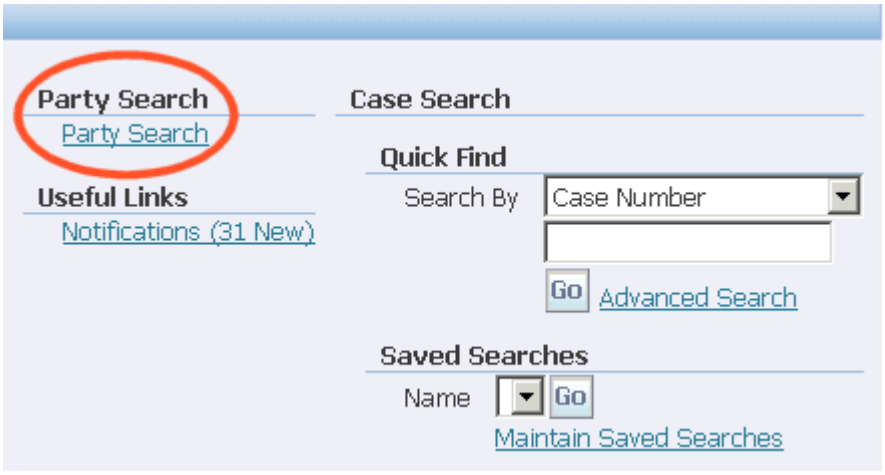
Creating a Case

Security has just apprehended a passenger who was in the possession of a knife at the airport boarding gate.

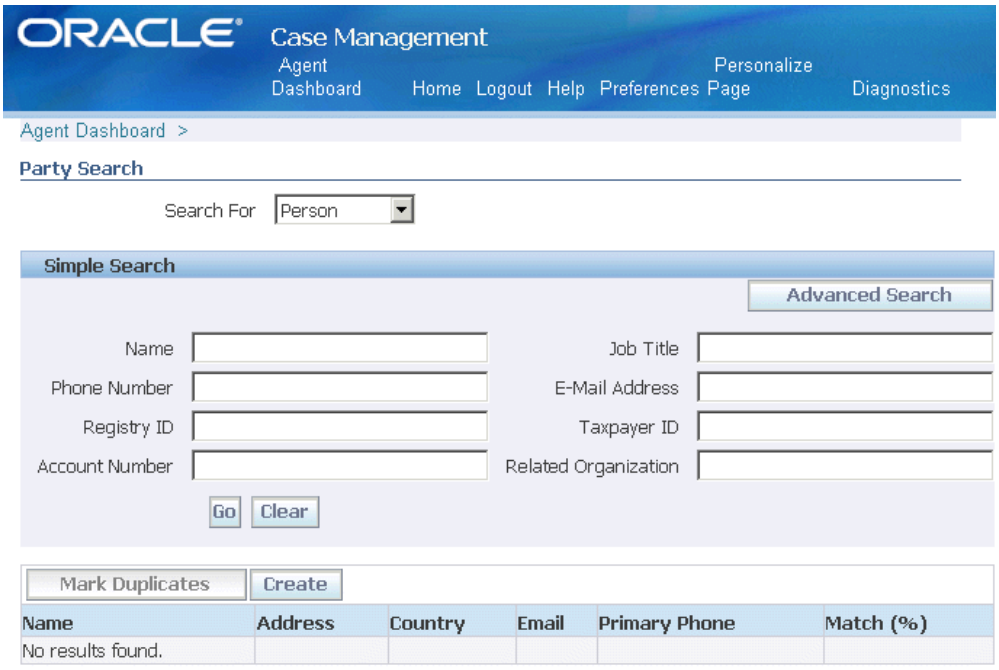
1. Security agent Ted Crilly starts by searching the database for any information on

the suspect.

2. Mr. Crilly selects the Party Search link located at the bottom right of the agent dashboard (highlighted in the partial image of the Agent Dashboard below.)



3. The Party Search page appears.

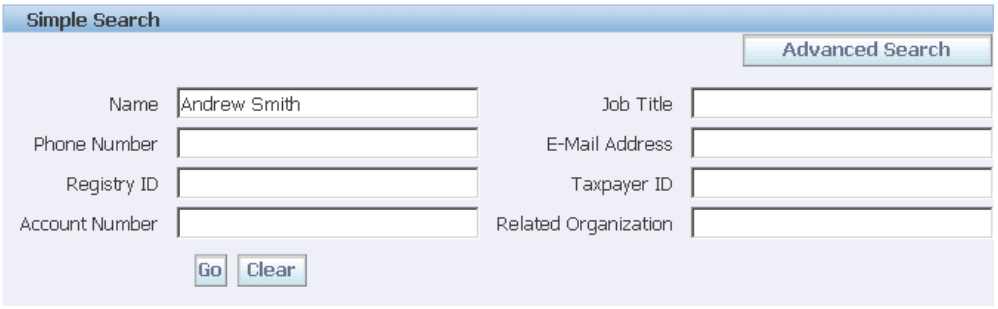


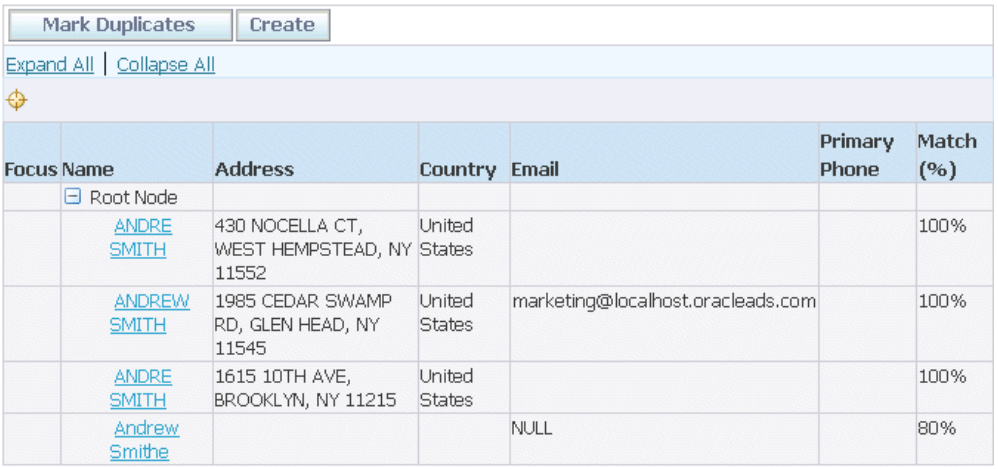
4. The agent chooses Person from the Search For drop-down list, enters any available identifying information about the suspect, and clicks **Go**.

   In this example, the name the suspect has given "Andre Smith" yields three matches.

Additional search criteria are available in advanced search.

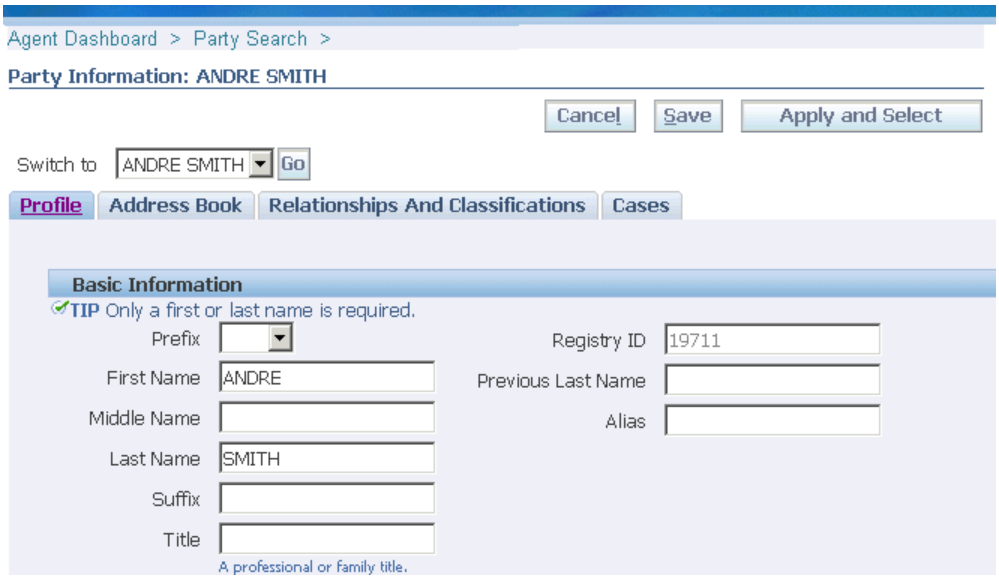
> **Note:** If the suspect is unknown, the agent can choose an Unknown party that is set up by the application administrator. See Setting Up the Capture of Unknown Associated Parties, page 49-2.





Focus	Name	Address	Country	Email	Primary Phone	Match (%)
	Root Node					
	ANDRE SMITH	430 NOCELLA CT, WEST HEMPSTEAD, NY 11552	United States			100%
	ANDREW SMITH	1985 CEDAR SWAMP RD, GLEN HEAD, NY 11545	United States	marketing@localhost.oracleads.com		100%
	ANDRE SMITH	1615 10TH AVE, BROOKLYN, NY 11215	United States			100%
	Andrew Smithe			NULL		80%

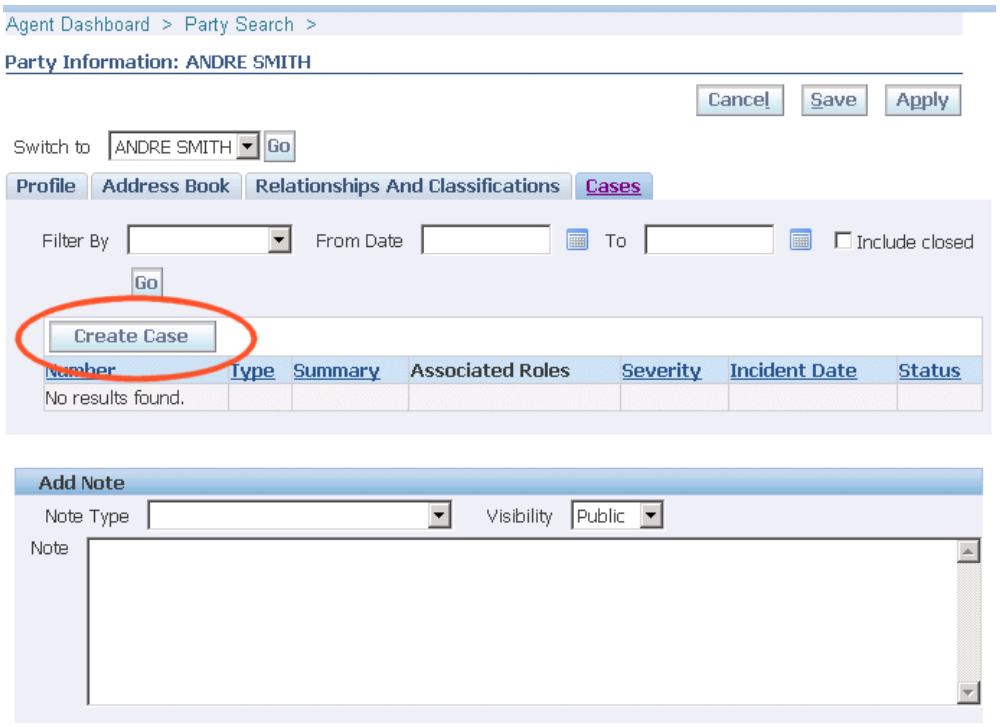
5. Selecting the Name link displays more information about any of the parties in the database. Agent Crilly chooses the first name on the list based on the address the suspect has provided.



6. Agent Crilly verifies the basic information about the suspect on the Profile tab and addresses and contact points on the Address Book tab.

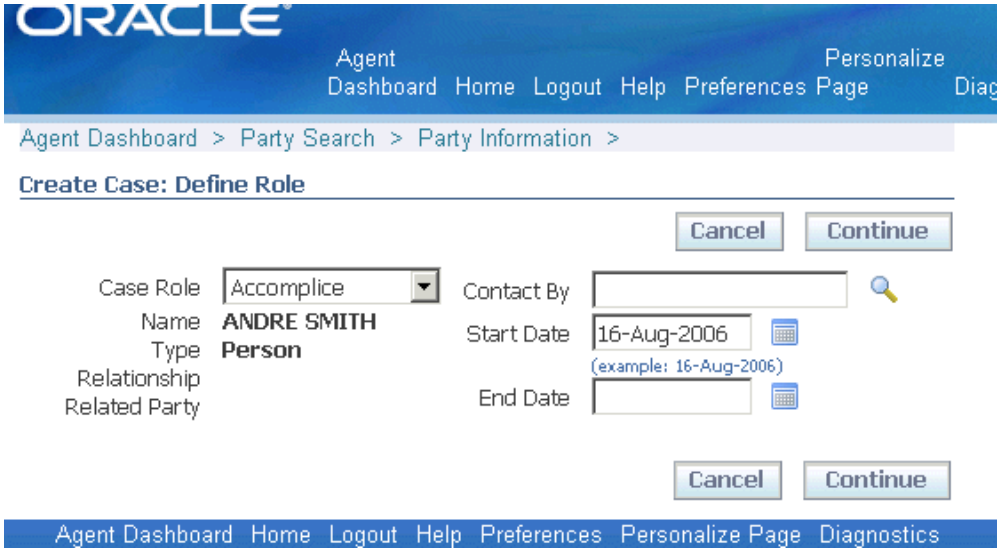
   The Relationships And Classifications tab captures relationships between Andre Smith and other parties. It is here that Mr. Crilly could enter information about Smith's wife or children or his relationship to a criminal organization.

   The Cases tab displays any other cases pending for the person. There are no pending cases against Andre Smith.



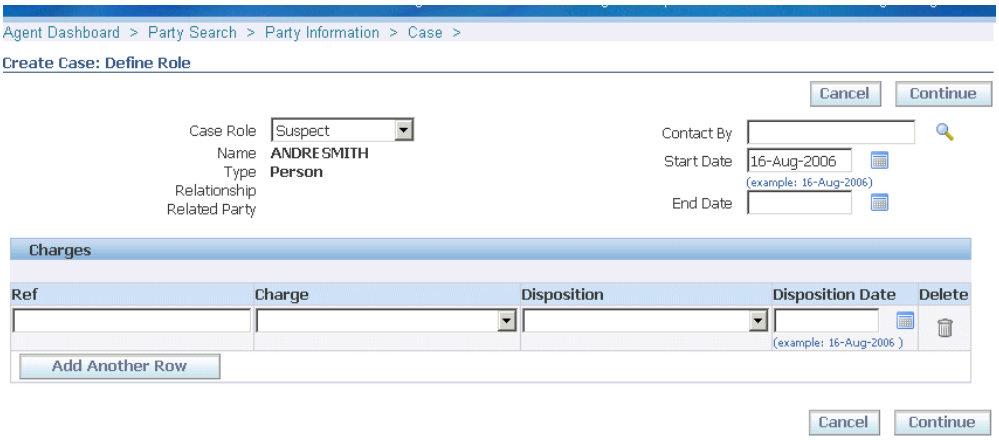
7. Mr. Crilly clicks the Create Case button to start the case creation process.

   The Create Case: Define Role page appears.



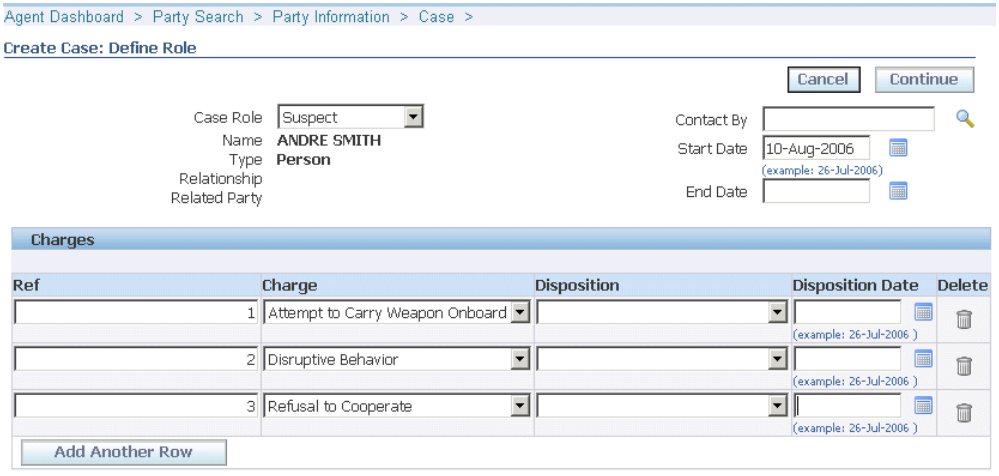
8. From the Case Role drop-down list, agent Crilly chooses "Suspect" to indicate Andre Smith's role in the case.

   The Create Case: Define Role page refreshes to display the additional attributes the application administrator has set up for this role.



9. Mr. Crilly specifies the charges against the suspect in the fields provided. He can specify multiple charges by clicking the **Add Another Row** button.

> **Note:** You can capture different information for each different role in the case by setting up extensible attributes. If there are any duplicate cases based on the additional attributes or the incident address, they will be displayed in a separate page. The agent can mark a case as a duplicate of this case.See Setting Up Associated Party Extensible Attributes, page 50-12.



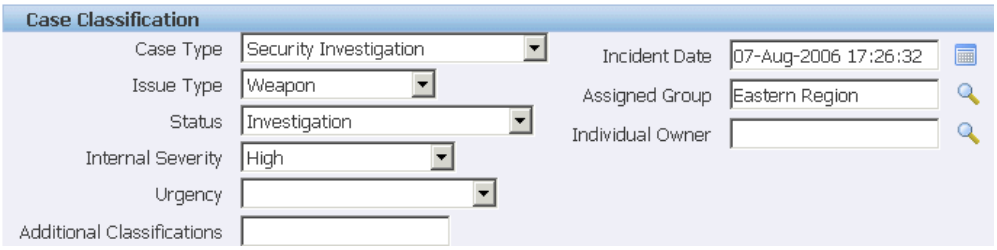
10. Clicking **Continue** displays the Create Case: Provide Details page. (The following image shows only the upper left corner of the page.)

11. Mr. Crilly fills in the case summary in the Case Details region: "possession of knife at security gate", chooses "Security" as the note type and retains "Public" as the note visibility.

    Note: : The default Note Type and Visibility are set in the profiles Service: Default New Note Type and Note: Default Note Status respectively. Mr. Crilly can change these values, if needed while creating the case.

12. Agent Crilly classifies the case by choosing the case type: "Security Investigation" and an issue type: "Weapon". For status, he chooses "Investigation".

    Note: Issue types use the same setup as problem codes for service requests.



13. Because he is going to continue working on the case for the time being, Agent Crilly enters his name into the Individual Owner field.

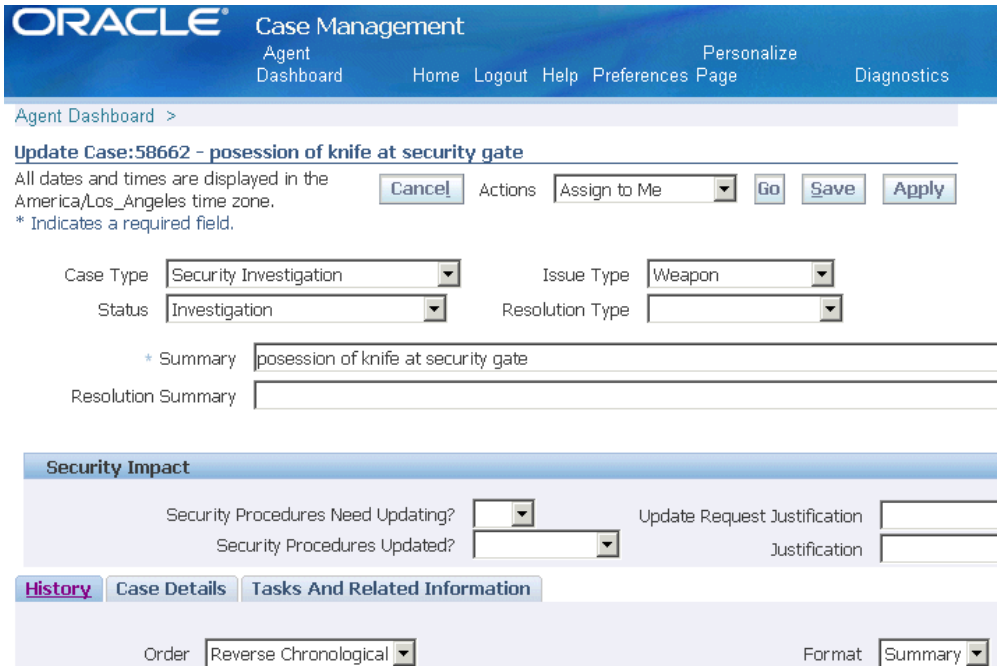
    Alternately, the agent can select a different assignment mode. The Assign Automatically option causes the application to assign the service request to the appropriate support group or to a specific agent, depending on how you set up your work assignment and distribution. If the *Service: Real-Time Automatic Assignment of Service Requests in Agent-Facing Applications* profile is set to *Yes*, then the Assign Automatically option is selected by default but if the profile is set to *No*, then the default value is Assign Manually.

    Alternately, the agent can keep possession of the service request by choosing Assign to me and My Group option or keep ownership in her support group by choosing Assign to My Group, or may want to assign the service request manually to some other agent by choosing Assign Manually option.

    If the assignment mode is manual, then the default values for Assigned Group and Individual Owner are displayed from the profiles *Service: Default Group Owner for Service Requests* and *Service: Default Service Request Owner* respectively, if they are defined.

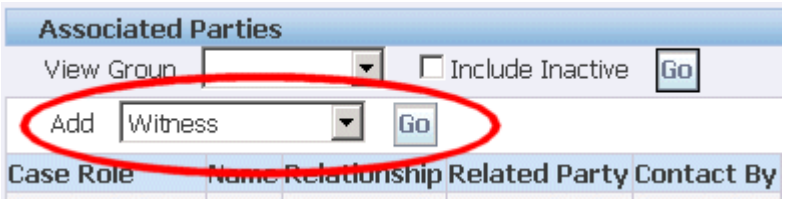
14. He clicks **Apply** to create the case.

    The application creates the case and displays it in the Update Case page. (The image below shows the top left hand side of the page only.)

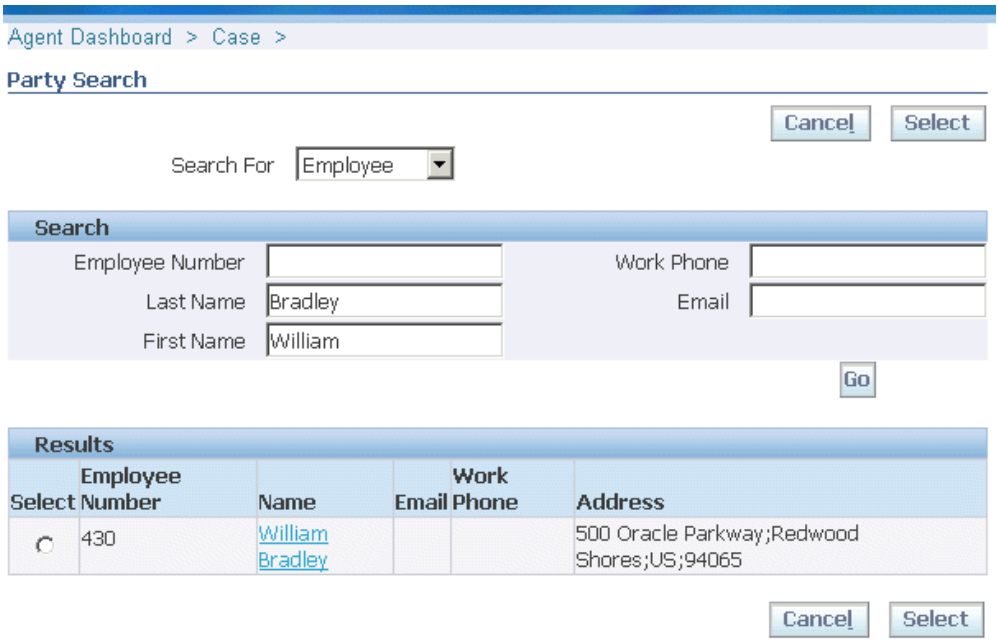


Agent Crilly is now ready to enter additional information from one of the security screeners who witnessed the incident.

15. In the Associated Parties region of the Case Details tab (shown in the image below), he chooses "Witness" from the Add drop-down list and clicks **Go**.



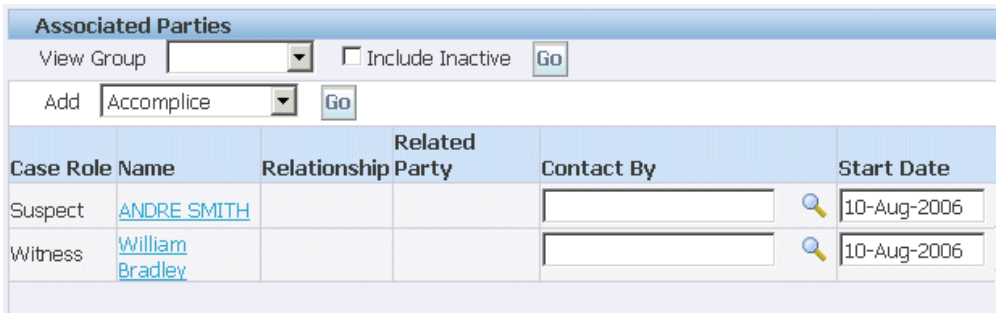
16. In the Party Search page, he chooses "Employee" as the witness is a fellow airport employee, and enters the name in the Party Search page. Clicking **Go** initiates the search.



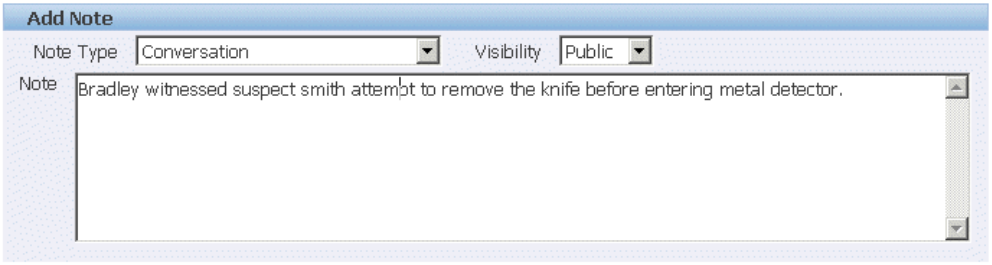
17. Mr. Crilly selects the employee using the Select radio button and clicks **Select**.

    The application displays the Update Case page with the witness now associated to the case.

    Note: You can capture additional information about the witness or any other associated party role by setting up extensible attributes. If you do, the application displays the Add Party Enter Attributes page requiring agents to make entries before returning to the Update Case page.

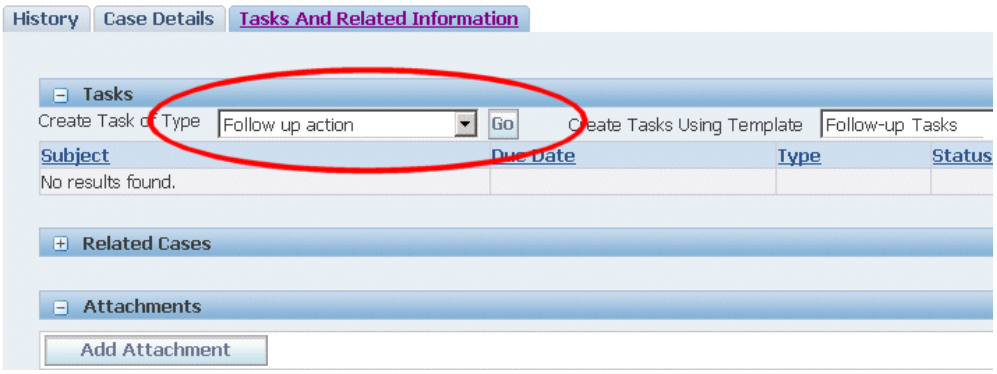


18. Crilly adds a note about what the witness reported at the bottom of the Case Update page.



19. Agent Crilly checks the Open Tasks for the case in the Dashboard region. Since there are no pending tasks, he generates a task for his associate.

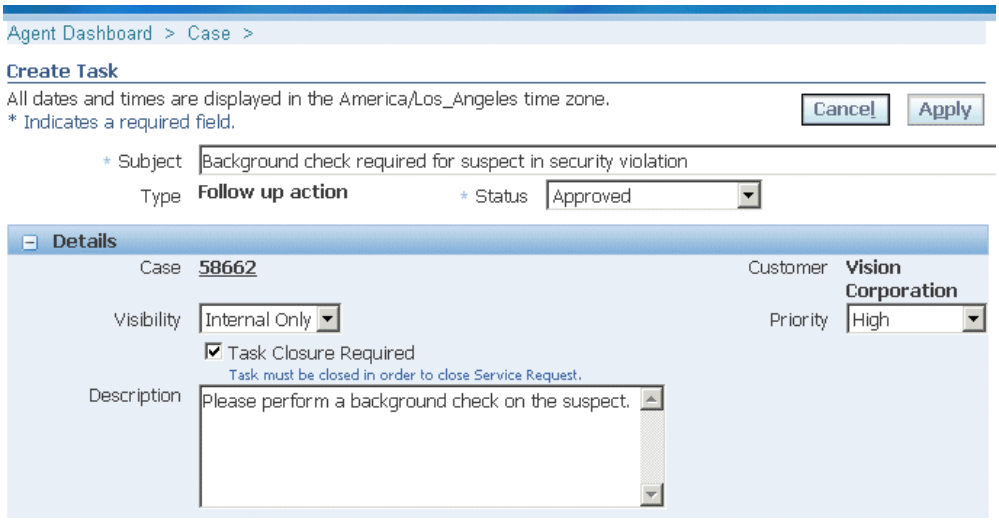
20. Agent Crilly generates a task for his associate to investigate the suspect's background. He navigates to the Tasks And Related Information tab, chooses the task type, and clicks **Go**.



> **Note:** You can set up task templates your agents can use to create tasks for common types of cases. You can have these tasks created automatically based on the case type, issue type and other attributes. See Generating Tasks Automatically, page 25-1.

The Task Creation page appears.

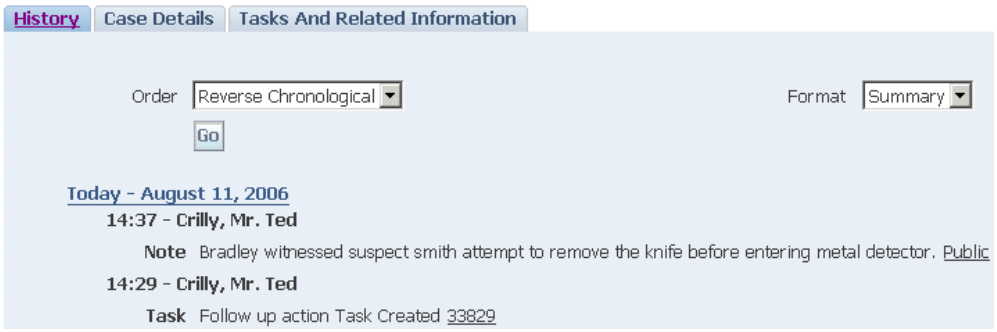
21. Agent Crilly enters the task and description and selects the Task Closure Required check box to ensure the case is not closed before this task is completed.



22. Mr. Crilly clicks **Apply** to create the task and returns to the Update Case page.

> **Note:** The application automatically assigns the task to the appropriate agent based on service territories and availability. For details on setting up task assignment, see Implementing Work Assignment and Distribution, page 16-1.

Both the note and new task are recorded on the case History tab.



> **Note:** By setting up notifications, you can have the application keep all the required parties automatically informed when the case is updated. SeeSetting Up Notifications, page 21-1.

23. Mr. Crilly clicks the Interaction tab and views the following interactions and activities.

When	Interaction	Activity
Mr. Crilly creates the case	Case is created	Case Created
Mr. Crilly updates the case	Case is updated	Case Updated
Mr. Crilly updates the case with further details	Case is updated	Case Updated
Mr. Crilly adds a task on the case	Task is created	A task is added

He notes down the Interaction ID, Customer Name, Agent, Reason, Result, Outcome, and Start and End Dates.

Searching Cases

Case Management offers agents multiple ways of searching for cases from the Agent Dashboard.

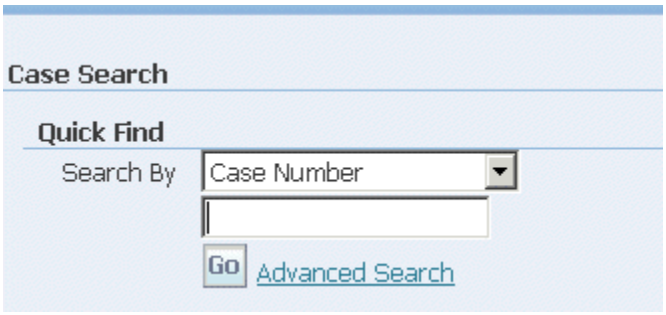
This topic discusses:

- Quick finds, page 53-13
- Advanced searches, page 53-14
- Saved searches, page 53-21
- Application Search, page 53-23

Quick Find

The QuickFind feature makes it possible for you to find cases by case number.

> **Note:** Some implementations may want to expose additional search criteria by modifying the lookup CSZ_SRCH_QUICKFIND_CODE_CASE. For details, see Case Management Lookups, page 43-40.



Advanced Searches

Selecting the Advanced Search link under QuickFind on the Agent Dashboard permits complex searches, including searches by the different party roles and party role attributes.

This section highlights two advanced searches:

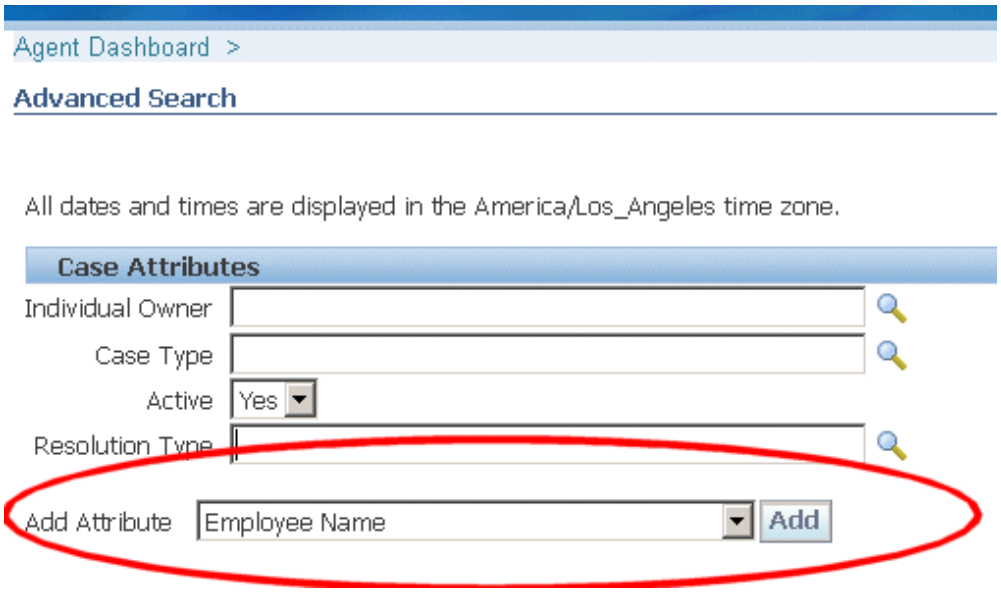
- A party search: What cases am I involved in?
- An associated party search: What cases is employee Wiliam Bradley involved in as a witness where Andre Smith is the suspect?

What cases am I involved in?

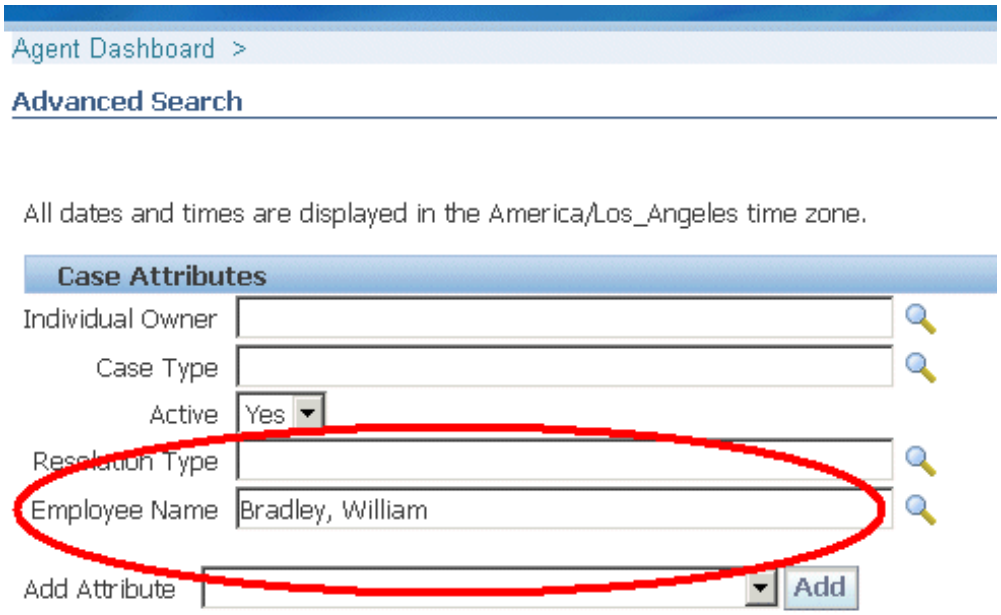
William Bradley calls agent Crilly to get a list of all cases he is involved in.

1. On the Advanced Search page, agent Crilly first adds Employee Name as a search term by choosing it from the Add Attribute drop-down list and clicking **Add**.

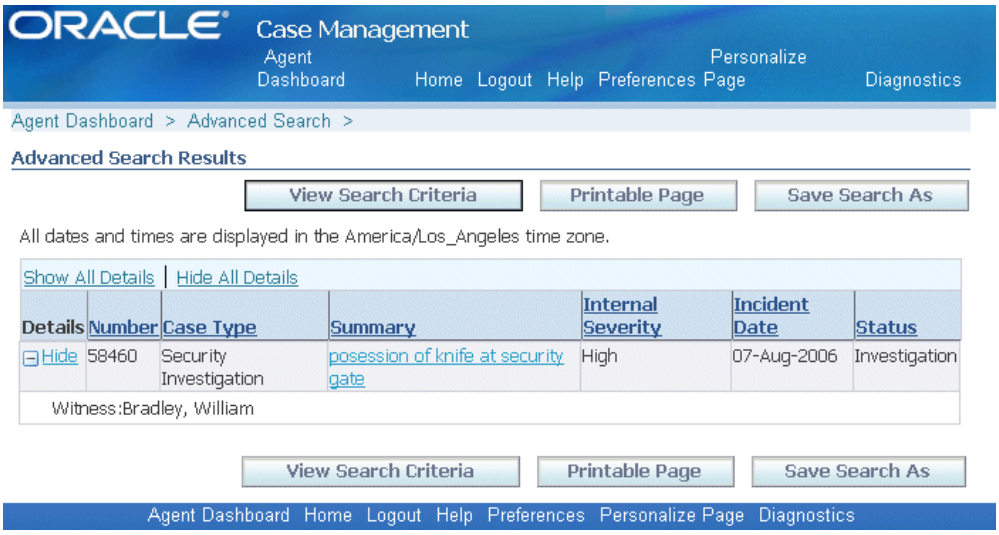
   Note: Using Oracle Applications Personalization you can eliminate this step and minimize user entries by specifying which search terms display as fields on the search page by default. This is possible for all search terms except for party roles and extensible attributes. See Personalizing the Advanced Search Page, page 43-20.



2. The agent enters the employee name and clicks **Search**.



The application displays the results on the Advanced Search Results page.

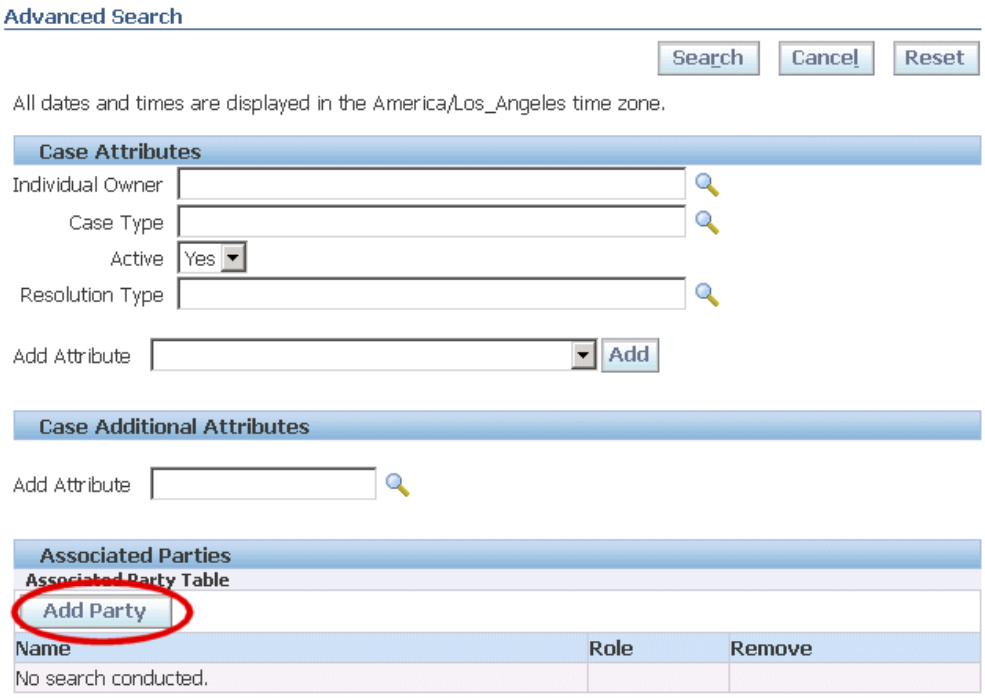


In this example, Bradley is a witness in case 58460, the knife possession at the security gate case.

What cases is employee William Bradley involved in as a witness where Andre Smith is the suspect?

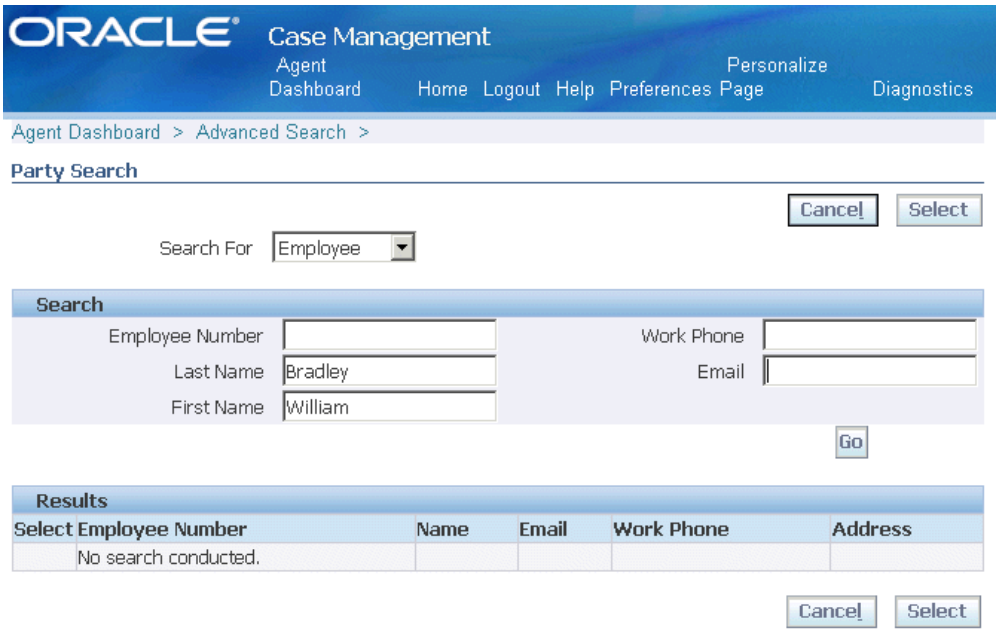
You can also search for cases involving one or more associated parties with specific roles. Here is how agent Crilly searches for all the cases where employee William Bradley is a witness and Andre Smith is a suspect.

1. On the Advanced Search page, Crilly clicks **Add Party** (the button highlighted in the image below).



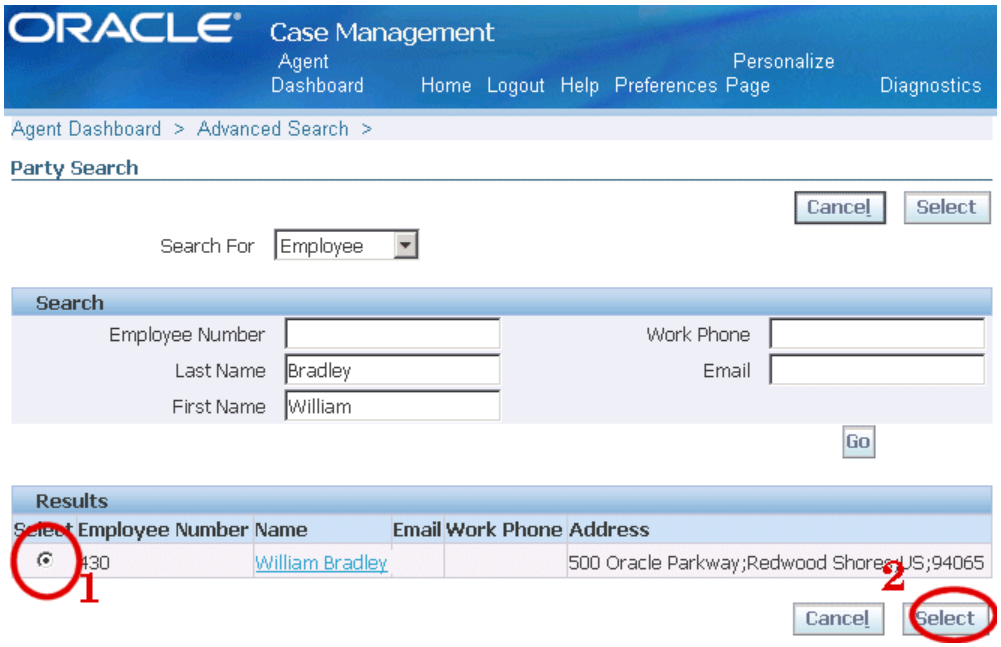
The Party Search page appears.

2. To add "William Bradley", he chooses "Employee" from the Search For drop-down list and enters the name.



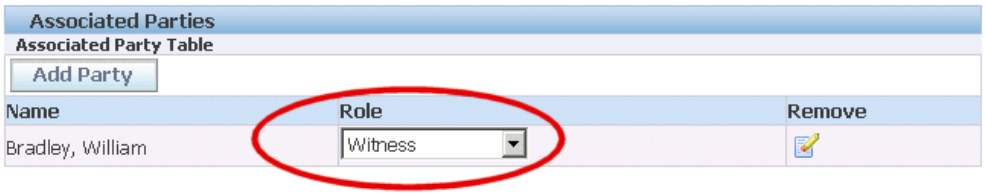
3. Clicking **Go** performs the search and displays the results.

4. Agent Crilly selects the record: selecting the Select radio button (region 1 in the image below) and clicking **Select** (region 2).



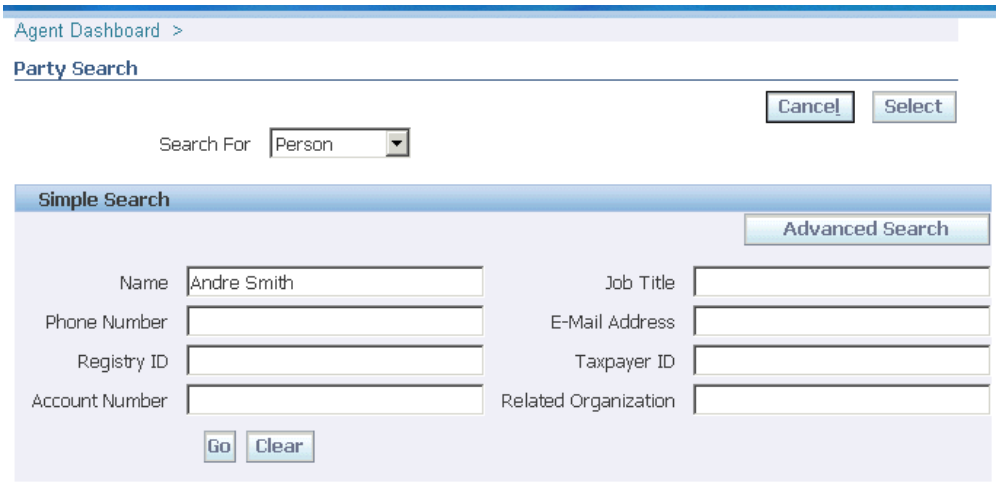
"William Bradley" appears in the Associated Parties region of the Advanced Search window.

5. Agent Crilly chooses the role for this associated party: "Witness".



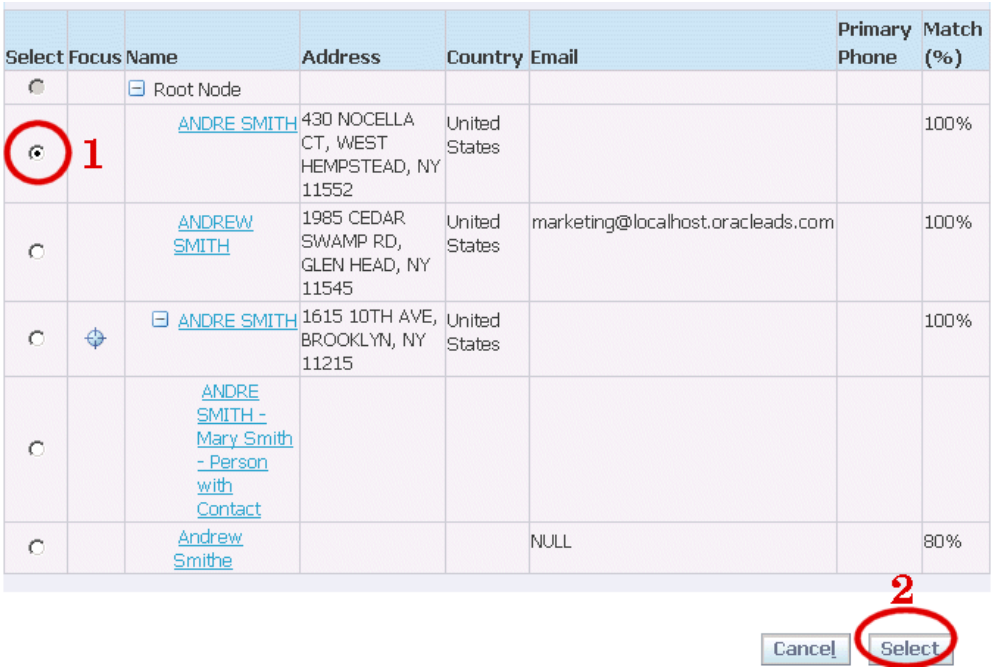
6. Agent Crilly clicks **Add Party** to add the second associated party: the suspect Andre Smith to the search.

7. Agent Crilly chooses "Person" for Search For and enters Andre Smith in the Name field.



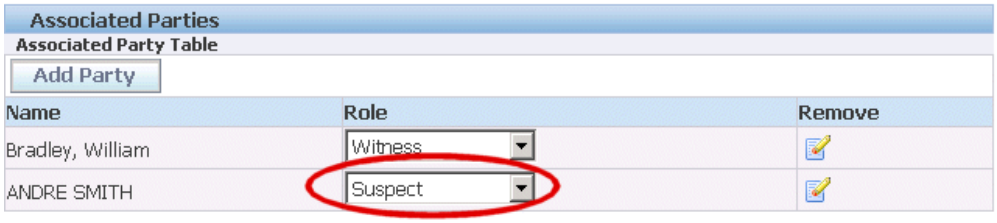
8. Clicking **Go** searches for all parties with a similar name. The application displays the result below.

9. Agent Crilly selects the party as shown below.



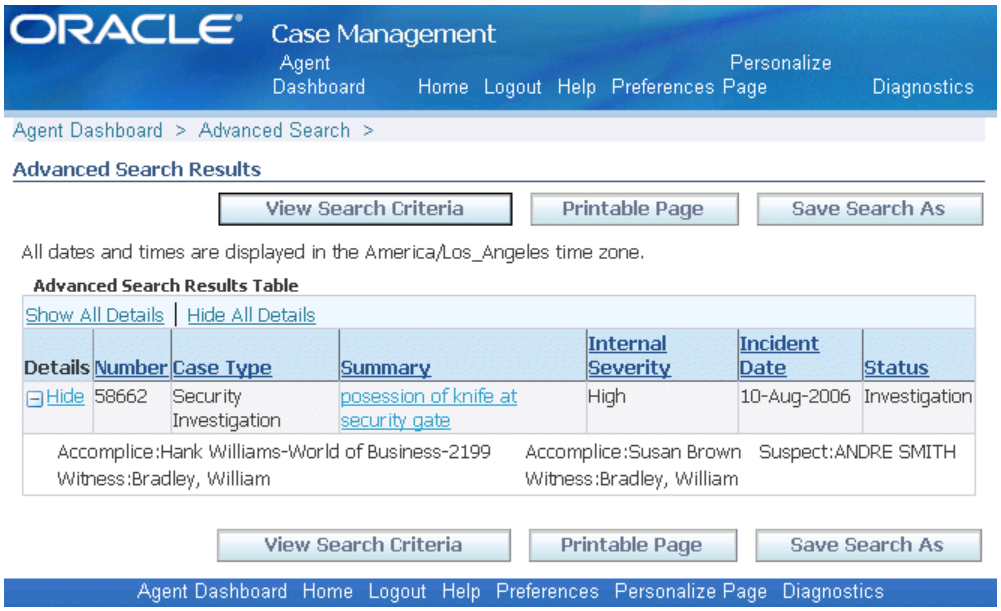
Andre Smith appears as the second associated party in the Advanced Search window.

10. Agent Crilly chooses the role: "Suspect".



11. And clicks **Search**.

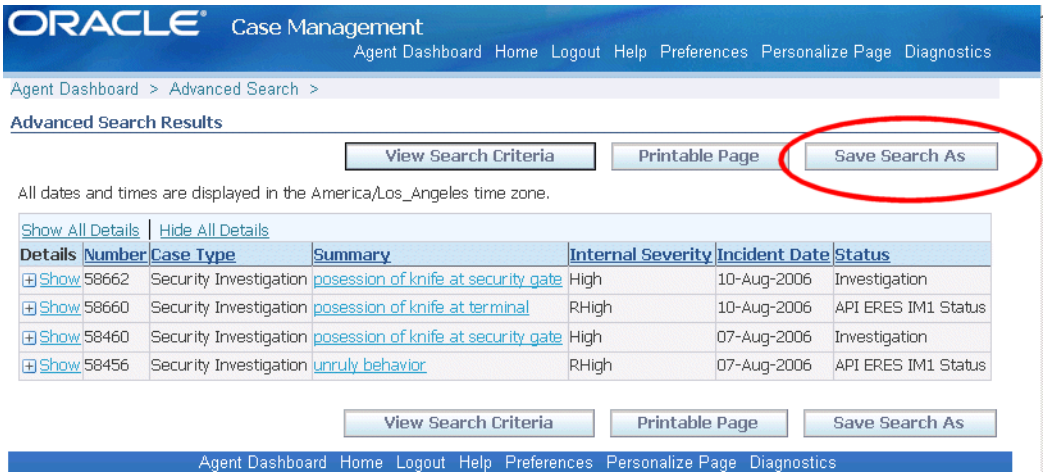
    The application displays the result of the search below. William Bradley is involved as a witness and Andre Smith as a suspect in case 58662: the security investigation involving the possession of a knife at the airport security gate.



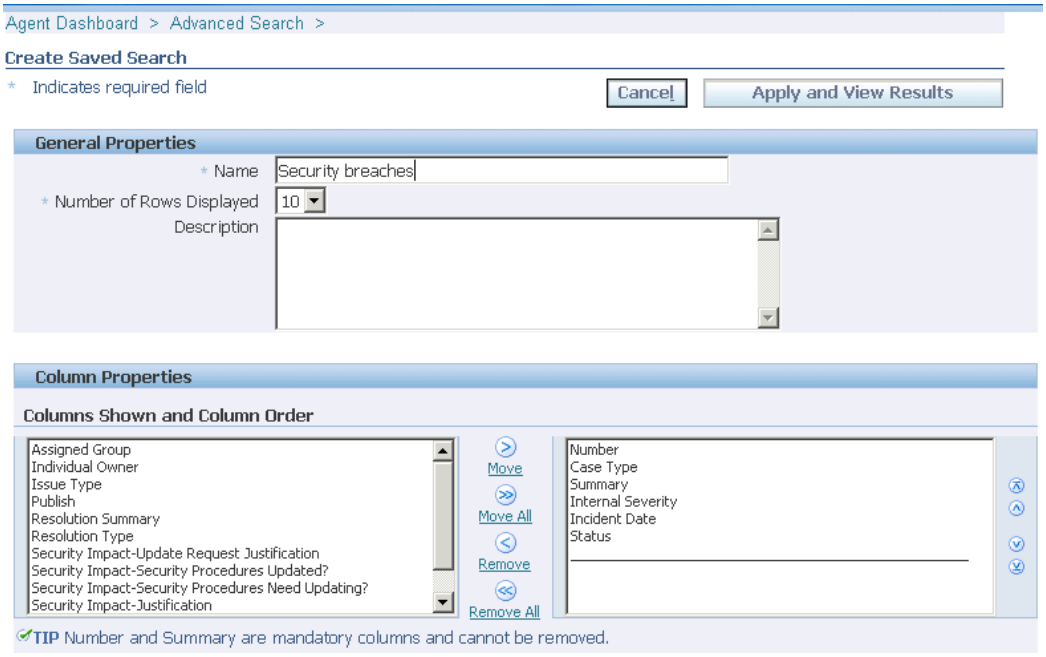
Saved Searches

You can save your advanced search criteria for reuse. Agents can use saved searches to track service requests of a colleague who left on vacation, for example, or to track open cases for their work team.

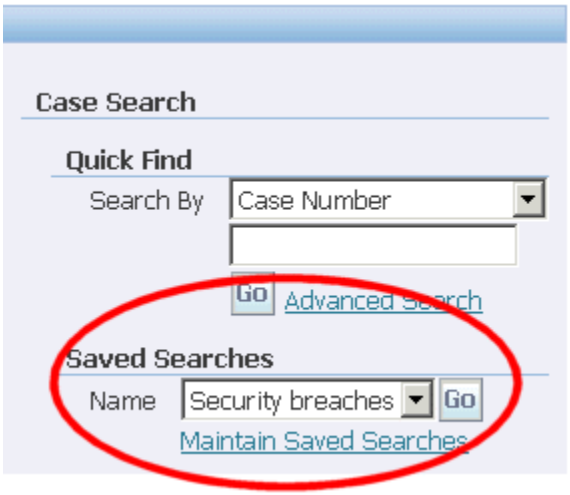
To create a saved search, perform an advanced search and click Save Search As on the results page. You can also save the search criteria from the Maintain Saved Searches page and save it. You can choose to associate the saved search criteria either with all users or with selected responsibilities. When you associate the search with all users or selected responsibilities, the search becomes centrally defined. In the former case, the search is displayed for all users but when you map the search only to certain responsibilities, then only users under that responsibility can view the search criteria.



The Create Saved Search page makes it possible for you to name the search and to modify the display of results or the search criteria themselves. (The image below shows part of the page only).



Saved searches appear on the Agent Dashboard right underneath Quick Find.



Application Search

An agent can search for a service request from the Application Search region in the Agent Dashboard. The agent must select Cases from the Enterprise Search LOV, enter a keyword, and click Go. The application displays the results on the Apps Search Results page. The agent can further narrow down the search by using the filter criteria provided. The agent can then click on the Service Request number, to view or update the service request details in the Update Service Request page.

Creating and Updating a Task

This example illustrates the creation and updating of a task for a case regarding a suspect.

1. In the My Cases queue, Agent Crilly goes to the case regarding the suspect and clicks the Case Summary link.

2. He clicks the Tasks and Related Information tab to create a task to follow up the case with Mr. Bradley who was the witness for the case. He chooses "Follow Up Action" from the Create Task of Type list and clicks **Go**.

3. He sets the time zone to agent time zone to accurately identify the start and finish times for the job.

4. He enters "Follow up with Mr. Bradley" as the subject and the address of the place where the witness lives in the address.

5. As the investigation may take approximately 2 hours, he enters 2 as the planned effort and selects hours from the list and changes the status of the task to Assigned.

6. Next she selects the Task Closure Required to ensure that the service request is not closed before this task is closed.

7. Then he assigns the task to Mr Phillips, another investigator belonging to the group "Legal Team" and schedules the task in his queue.

   The resources displayed in the list are based on the value set in the *Service: Filter Task Assignee LOV by the Task Owner Group*" profile. If this profile is set to *Yes*, the Assignee is filtered based on the owner group.

8. Next, Mr. Phillips opens the Agent Dashboard to view his work on hand. To view all his work assignment locations, he clicks Show Tasks on Map at the top of the My Tasks table. This displays the Google Map showing five locations with the respective tasks that are assigned to him.

9. He opens the first task in the update mode and accepts the new task assignment.

10. He views that the case was logged for a suspect held at gun point and the task is to get further information on the case from Mr. Phillips.

11. He updates the task status to Completed. Mr. Phillips will not be able to make any further updates to the task, as this status disables him from making any further changes to the task.

Searching for Tasks

Task search offers a wide variety of search criteria to search for tasks related to a service request.

For example, an agent can use task search to find all tasks created within the last week or owned by Mary Swanson. Or the customer may call regarding tasks for service request 9909. The agent then clicks the Task Search link in the Agent Dashboard and enters 9909 as the service request number. All tasks pertaining to the service request are displayed in the results region.

To start Tasks Search, click the Task Search link in the Agent Dashboard. The Tasks Search page is displayed. You can search for tasks based on the following attributes:

- **Task Attributes**

  You can search for tasks based on most of the task details including the task type, service request number, task number, status, and priority. You can also view the parent task associated with a task, if any. You can also search on customer information related to a task including name, account, and number.

  You can select any of the following options to narrow the search results:

  - Show Only Open Tasks – Select this check box to display only tasks that are open

- Show Only Escalated Tasks – Select this check box to display tasks that have been escalated. This is helpful in finding tasks on which immediate action is required.

- Show Tasks for Escalated Service Requests Only – Select this check box to find tasks only on service requests that have been escalated. The results may include open, closed, or escalated tasks.

- **Subject and Description**

  You can search for tasks based on the subject and description of the service request.

  For example, you can search for tasks related to the subject "Monitor not working". This may be helpful in identifying crucial tasks that were performed for resolving a service request in the past and using the same tasks to resolve the current service request.

- **Owner**

  You can find tasks based on the owner of the task. The owner may be yourself, your group or your team members, or your group or team. If you do not know the owner, you can also select the Any option.

- **Assignee**

  You can search tasks based on whom the task is assigned to. For example, if Mary Swanson is owner of tasks A, B, and C and she is on vacation from 12th to 20th July and has tasks that have been escalated and assigned to her, then you can select the Show Only Escalated Tasks option in the Task Attributes section and then select Others in the Assignee region and the type as Employee Resource and enter Ms. Swanson, Mary as the Name.

- **Task Dates**

  You can find tasks based on a specified duration. You can use the planned, scheduled and actual start and end dates to search for tasks.

Saving Task Search

Agents can save the advanced search criteria for reuse. They can use them to track tasks created for a specific customer or for an item, or to the person to whom the task was assigned, or tasks created during a specific period.

To create and save task search criteria, click **Create Saved Search** on the Agent Dashboard or perform an advanced search and click **Save Search A**s on the results page.

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Charges User Procedures in Forms Interface

This chapter covers the following topics:

- Creating a Charge Line
- Understanding Automatic Submission of Field Service Charges
- Submitting Charges Manually
- Viewing the Status of Submitted Orders and Invoices
- About Different Return Types
- Creating a Return for Credit
- Creating a Return for Replacement
- Creating a Charge Line for a Return
- Creating the Charge Line for a Replacement
- Creating a Return for Repair
- Reviewing and Submitting Field Service Charges for Billing
- Viewing Pending Charges for Field Service Tasks
- Viewing the Source of a Charge Line
- Viewing a Report of Charges for a Service Request

Creating a Charge Line

Use this general procedure to create a charge line in a service request.

> **Note:** Different entries are required for creating a charge line for a physical item, such as return or a replacement, or for the billing of a customer for time, material, and expenses.

For steps required to complete returns for credit, replacement, and repair see Creating a

Return, page 54-10.

Prerequisites

You must create a service request before you can create a charge against it.

To create a charge line:

1. Display the service request in the service request window.

   The Service Request window appears.

2. Select the Charges tab.

3. Select the Action subtab.

4. View or edit the following fields:

   - Line

     Read-only charge line number

   - Charge Line Type

     - Actual: Use this setting unless you are preparing an estimate that requires customer approval. Any charge line you set to Estimate is not submitted to Oracle Order Management and does not appear on the customer's invoice.

     - Estimate: Use this setting to create an estimate. You can create a charge line from an estimate by using the Copy to Actual button.

       The application adds a new charge line of type Actual to the Actions subtab.

   - Operating Unit

     Defaulted to the organization which recognizes the debit or credit from this charge line. The organizations you can select from are specified by the administrator.

   - Business Process

     Defaulted by the service request type specified on the service request header. Each service request type is mapped to only one business process via the Service Request Types Setup page. The Service: Charges – Default Business Processes from SR profile option determines if this field should display a default value. If this profile is set to No, the user has to manually select a value from the service request type LOV. The business process determines which contract terms apply if a contract is specified. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the LOV in the Service

Activity field.

The Service: Charges – Default Business Processes from SR profile option can be set to Yes or No to determine if this field is defaulted. If set to No, the user has to manually select a value from the LOV.

- Service Activity

  Enter the purpose of this charge line, for example, Return, Labor, and Expenses. The selections are specified by your administrator.

- Item Number

  Inventory number of the labor, material, or expenses item. You must make an entry in this field even if you are entering a charge line for an install base item a customer is returning.

- Revision

  Revision code for the inventory item. This field is enabled automatically when you enter an inventory item number that is revision controlled.

- Billing Type

  Read only field that displays an Oracle Inventory item attribute. The type can be material, labor, expense, and other user defined types.

- UOM

  Unit of measure. The value defaulted in this field depends on the item you selected.

- Quantity

  If you are entering a return the quantity must be negative. If the return is for an install base item, the quantity must be -1.

- Return Reason

  This field is enabled only if this line is for a return. Use it to select an appropriate return reason code.

The Unsubmitted and Total fields within in the Actuals and In Progress region are updated after you enter an item.

5. Select the Item Instance subtab.

6. If you are creating a charge line for an install base item, then you can view or enter the item by making a selection using one of the following lists of values (LOVs):

   - Tag Number

Oracle Install Base identification number.

- Instance Number

  Oracle Install Base or Oracle Asset Tracking instance number.

- Serial Number

  Item's serial number.

- Parent Serial Number

  Parent item's serial number.

The following fields are for view only:

- Item number
- Revision
- Description

7. If you are creating a return, then you must enter a date by which the customer must return the item in the Return By Date field. This field is mandatory if the Return Reqd check box is selected in the Transaction Subtypes Setup screen.

8. Select the Pricing subtab.

   Here you can view the list price for the item and override it. If you do not want to charge the customer for this line, then select the No Charge check box.

   The Line, UOM, Qty, and Billing Currency are defaulted from other tabs.

   - List Price

     The price of the item from the price list entered on the Pricing Rules subtab or, for expenses, the currency amount you entered in the Action tab.

   - Billing Currency

     The default billing currency for the charge is displayed based on the selected item and the currency in the pricing list. Set the Service: Enable Currency Conversion in Charges UI profile option to Yes to select a different currency. The currency LOV displays the base currency of the price list, in addition to any currencies listed in the currency conversion list associated with the price list.

   - Override Unit Price

     You can use this field to adjust the unit price.

   - Extended Price

Read-only field that displays the Override Unit Price times the quantity.

- Contract Discount Amount

  Read-only field that displays the discount based on the contract entered in the Contract Number field on the Pricing Rules subtab.

- Net Price

  The extended price minus any contract discount. You can adjust this price which is the price that appears on the customer invoice.

9. Select the Pricing Rules subtab.

10. View and edit the following:

    - Contract Number

      Number of the contract which applies to this line. The application defaults the contract applied to the service request as a whole, but you can choose a different contract using the List of Values. You can view the details of the contract by clicking **Coverage**.

      > **Note:** Task debrief lines submitted from Oracle Depot Repair default the repair order contract instead of the service request contract.

    - Coverage

      Read-only field detailing what the contract covers.

    - Price list

      The price list used to determine the pricing of the item. The default value is displayed based on the value in the selected contract. If the contract does not define a price list, then it is displayed based on value set in the profile Service: Charges - Default Price list. If this profile is not set, then there is no default price list.

    - Billing Currency

      Price list currency.

    - Customer Purchase Order

      Number of the customer purchase order. This number appears on the invoice.

    - Rate Type

      You can choose a rate type for labor items. The Rate Type field is enabled if the

chosen item's billing type is Labor and the selected contract includes a labor rate.

11. The billing address for the customer invoice is defaulted from the service request Bill To address (displayed in the Contact Center's Contacts/Addresses tab). If you want to modify the billing address then, select the Bill To subtab.

    View and edit the following:

    - Bill To Party

      Party that is to receive the invoice.

    - Bill To Account

      Account that is debited or credited for the transaction.

    - Card Number

      Number listed on the credit card. If you have not manually changed the credit card at the service request header level, these changes are displayed by default to the charge line level credit card only for the new records recreated there after. You can change this credit card information in the Charges tab.

    - Card Type

      Type of card held by the card holder.

    - Card Holder

      Name listed on the credit card.

    - Bill To Address

      Address where the invoice is sent.

    - Bill To Contact

      You can enter a contact here for information only. The contact does not get passed to Oracle Order Management.

12. The default shipping information for the charge line is displayed based on the information in the Ship To subtab from the service request Ship To address (displayed in the Contacts/Addresses tab). If you are shipping an item in this charge line and want to view it or select a different address, then select the Ship To subtab.

    - Ship To Party

      Party that is to receive the shipment.

    - Ship To Account

Oracle Order Management requires an account number entered in this field to recognize the shipping address. The customer is not charged on this account.

- Ship To Address

  Address where the item is sent.

- Ship To Address

  Address where the item is sent. This address is displayed based on the value set in the Service: Validate Bill To and Ship to LOVs profile. If the profile is set to By Account Sites, then the LOV displays the list of active Ship To party sites that have corresponding active account sites, if an account number is selected on the charge line. If the account number is not selected on the charge line, the LOV does not display any value. If the profile is set to By Party Sites, then the LOV displays the list of active Ship To party sites for the selected party.

- Ship To Contact

  You can enter a contact here for information only. The contact does not get passed to Oracle Order Management.

13. Select the Order Details subtab.

14. Optionally, select the inventory organization, which is the shipping or receiving organization for the charge line. The inventory is displayed by default, if the Service: Enable Return Routing Rules profile option is set to Yes and the routing rules return a default inventory. If there are no routing rules, which return an inventory, this field is blank.

    The cost of the item on the charge line is determined based on the inventory organization.

15. Optionally, select the sub inventory, which is the sub inventory for the charge line. The sub inventory is displayed by default if the Service: Enable Return Routing Rules profile option is set to Yes and the routing rules return a default sub inventory. If there are no routing rules, which return a sub inventory, this field is blank.

16. Select the Return Type for the charge line if the service activity is of return type. The default value is displayed based on the specified in the Service: Default Return Type profile option.

17. Verify that the OM Interface check box is selected if you want this charge line to be passed to Oracle Order Management.

    The default value for this check box is determined by the setup of the service activity code.

18. Optionally, you can simplify customer invoices by grouping all charge lines under the generic headings of time, material, or expenses by selecting the Rollup check box.

    This way the different charge lines for pens and for stationery appear on the invoice as expenses, for example, and the charge lines for straight time, overtime, and time and half appear under the simple heading of time. Selecting the Rollup check box, substitutes the generic inventory item on the customer invoice. Your administrator must set this substitution up in the Billing Type Attributes setup window. For details, see the Modifying the Display of Charges on Customer Invoices, page 12-32.

19. Select the Order Status tab to review a summary of the orders information for each submitted charge line.

20. After you have completed adding all of the charge lines for the service request, click **Submit** to submit the order to Oracle Order Management.

    The Submitted and Unsubmitted fields within the Actuals and In Progress region are updated.

    > **Note:** You cannot update or resubmit charge lines after they have been submitted. Submitted charge lines appear as read-only.

21. In the Order Status subtab, you can view information about the order. This includes the order numbers where the different charge lines have been added, the status of each order as well as the invoice number and date.

    > **Note:** Depending on the setup of you implementation, you may need to use Oracle Order Management to book the order as described by *Oracle Order Management User's Guide*. However, your administrator can set a profile option that automatically creates orders in Booked status.

Understanding Automatic Submission of Field Service Charges

Your administrator can set up Field Service charges to be submitted automatically, after certain defined criteria are met. Your administrator can:

- Set conditions that must be met before the application submits charges to Oracle Order Management, for example, to automatically submit charges only when all of the service request tasks are closed.

  The application creates error messages for charges that are not submitted successfully. You can review these messages, by clicking **Charge Line Status Details**, the button next to the Line Status field on the Actions subtab.

Note: You can use the Find Service Request window to search for service requests containing charge lines of a particular status. For example, charge lines that have been restricted or have failed.

- Define charges that are exempt from automatic submission. Such charges can be reviewed manually, see Submitting Charges Manually, page 54-9.

  For example, your administrator can restrict charges, if the total of all charges for the service request exceeds a defined amount.

  Note: This feature works in conjunction with the Field Service Debrief module. Only charges generated from Oracle Field Service Debrief are eligible for automatic submission.

Submitting Charges Manually

Use the following procedure to submit charges manually.

Prerequisites

You must open a service request with eligible charge lines.

To submit charges manually:

1. Display the service request in the Service Request window.
2. Select the Charges tab.
3. Select the Action subtab.
4. Review the charge line statuses to identify any charge lines that have failed to submit.
5. To review details of any failed lines and to determine if you can submit these manually, click the Charge Line Status Details button next to the Line Status field.
6. Verify that an Incident Address has been selected in the Service Request header.
7. Click **Submit**.

   Charge lines that have been successfully submitted show a Type Status of "Submitted".

Viewing the Status of Submitted Orders and Invoices

Use this procedure to view the progress of an order for charge lines that have been submitted to Oracle Order Management.

To view the status of orders and invoices:

1. Display the service request in the Service Request window.
2. Select the Charges tab.
3. Select the Order Status subtab.
    - The confirmation number is displayed in the Order Number field.
    - The Order Status field displays the status of the order. If an Oracle Order Management order line is split, when a part of the order is put on back-order, for example, then Charges displays the status of the first line.
    - The invoice number and the invoice date display in the Invoice Number and Invoice Date fields respectively.

About Different Return Types

Oracle TeleService makes it possible for you to create three types of returns:

- Return for Credit

  A customer wants to return an item and receive credit to their account. See Creating a Return for Credit, page 54-11.

- Return for Replacement:

  A customer wants to receive a replacement. See Creating a Return for Replacement, page 54-14.

- Return for Repair:

  The item is to be repaired. See Creating a Return for Repair, page 54-20.

  Note: Charges is designed for service-related returns, not as a quoting or sales application. It uses the company's current price list rather than the original invoice or sales receipt for calculating customer credit.

Creating a Return for Credit

Use this procedure to create a return for credit. This type of return requires you to create just one charge line.

To create a return for credit:

1. Display an existing service request in the Service Request window.
2. If you are creating a return for an inventory item not tracked by Oracle Install Base, then:
    1. Enter a customer in the service request header. You can use a single piece of identifying information such as the customer's contract number or account number. You can use the Maximize or Minimize the Header button (plus sign) at the top right hand corner of the header to reveal additional fields.
    2. Enter the inventory item using the Item or Desc field lists of values. The Item LOV lets you search by inventory number; the Desc field by item description.

        Note: You must enter the item number again on the Charges tab later in this procedure.

3. If you are creating a return for an item in the customer's install base, then:
    1. If you know the serial number or the install base instance number, then enter them in the Serial or Instance fields using the LOVs provided.
    2. If you do not know the number you can search for it by clicking the Find icon to the right of the item field.
4. In the Service Request window header, check to see if the Type, Status, and Severity fields display the correct values for the return in your service organization.
5. Select the Workbench tab and enter a summary of the customer problem in the Problem Summary field.
6. Save the service request by clicking **Save** in the toolbar.
7. Optionally, check to see if the product is still covered under a contract and the customer can return it.
8. Select the Charges tab.
9. Select the Action subtab.

10. Optionally, change any of the default values in the following fields:

    - Charge Line Type

      Do not change the default Actual setting unless you are preparing an estimate that requires customer approval. (Any charge line you set to Estimate does not appear on the customer invoice.)

    - Operating Unit

      The organization which recognizes the debit from this transaction.

    - Business Process

      The business process is displayed by default by the service request type. The business process determines, which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

11. Using the Service Activity LOV, specify the purpose of the charge line (for example: Return for Credit). The values in this LOV are determined by the administrator.

12. In Item Number, enter the inventory item number for the item being returned. You must do so even if you are creating the return for an item in the customer's install base.

    Rev (Revision), Billing Type, and UOM (Unit of Measure) fields are populated automatically.

13. Enter the quantity of the item being returned as a negative number. If the item is tracked by the install base then this quantity must be `-1`.

14. Select the Pricing subtab.

    The UOM and Quantity fields are carried over from the Activity tab.

    The currency displayed in the Billing Currency field is defaulted from the price list and may not represent the currency the customer actually paid in.

    The List Price reflects the price as listed on the price list; not necessarily what the customer paid for the item.

15. If you wish to adjust the unit price, you can do so by modifying the Override Unit Price.

    The Extended Price is the Override Unit Price multiplied by the quantity.

    If a contract applies, the contract discount appears in the Contract Discount Amount.

    The Net Price is the extended price minus the contract discount amount.

16. If you wish to adjust the total amount of credit the customer receives, you can do so by modifying the amount in the Net Price field.

17. If the item the customer is returning is registered in Oracle Install Base or Oracle Asset Tracking, then select the Item Instance tab and enter the item using the Instance Number or Tag Number LOVs.

    Note: Entering an Install Base item does not automatically populate the item number in the Action tab.

18. On the Item Instance subtab, enter a date by which the customer is supposed to return the item in the Return By Date field.

19. The application automatically applies the billing address and other billing information you entered in the service request's Contacts/Addresses tab. If you wish to change it or review it, then select the Bill To subtab. You can make alternate selections using the lists of values provided:

    - Bill to Party: this field is defaulted from the Bill To Address region Customer field in the Contacts/Addresses subtab on the service request. You can select a different party using the LOV.

    - Bill to Address: the address where the customer receives a confirmation.

    - Bill to Contact: an optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

20. Select the Order Details subtab.

21. If you know the warehouse that receives the return, then use the Shipping/Receiving Warehouse LOV to select it.

22. Do not select the Rollup check box as it does not apply to returns.

23. Oracle Order Management automatically adds the charge line to an open order, but if you want to specify a specific order to add this transaction to, then:

    1. Select an order from the Add to Order LOV.

    2. Enter an order number using the Order Number LOV.

24. Make sure the OM Interface check box is selected. If the check box is selected, this charge line is not sent to Oracle Order Management unless this check box is selected.

25. Save your entries by clicking **Save** on the toolbar.

26. Enter any additional return items as described above.

27. When you are done entering information about the items the customer wishes to return, then click **Submit.**

    Note: You can only use Oracle Order Management to modify the charge line after you submit it.

28. Select the Order Status subtab.

29. The Order Number field displays the RMA number you can give to the customer to use for their equipment return.

30. Use Oracle Order Management to book the order as described by *Oracle Order Management User's Guide*. Booking the order notifies the receiving warehouse to expect the return.

    Your administrator can also set up the application to create orders in Booked status.

31. You can monitor the progress of the return by viewing the status displayed in the Line Status field on the Order Status subtab.

Creating a Return for Replacement

Use this procedure to create a return for replacement. This type of return requires you to create two charge lines: one for the item being returned and one for the replacement item to be shipped.

Submit only after you have entered both lines. The procedure for creating the first charge line is very similar to the procedure for creating a return for credit.

Steps:

1. To create a return for replacement: Display a service request in the Service Request window.

2. If you are creating a return for an inventory item, then:

    1. Select a customer in the Service Request window header. You can select a customer by name or by entering a single piece of identifying information such as the serial number of an install base item, the customer's contract number, or the phone number.

    2. Enter the inventory item using the Item or Desc field lists of values. The Item LOV lets you search by inventory number; the Desc field by item description.

Note: You must enter the item number again on the Charges tab later in this procedure.

3. If you are creating a return for an item in the customer's install base, then:
    1. If you know the serial number or the install base instance number, then enter them in the Serial or Instance fields using the LOVs provided.
    2. If you do not know the number you can search for it by clicking the Find icon to the right of the item field.
4. In the Service Request window header, check to see if the Type, Status, and Severity fields display the correct values for the return in your service organization. If not, use the lists of values (LOVs) to select them. Contact your administrator for more information about the correct settings for your organization.
5. Select the Workbench tab and enter a summary of the customer problem in the Problem Summary field.
6. Save the service request by clicking Save in the toolbar.
7. Optionally, check to see if the product is still covered under a warranty or contract and the customer can return it.
8. Select the Charges tab.
9. Create the first charge line for the return as described in Creating a Charge Line for a Return, page 54-16.
10. Create the second charge line for the replacement as described in Creating the Charge Line for a Replacement, page 54-18.
11. When you are done entering information about the items the customer wishes to return, then click **Submit**.

    Note: You can only use Oracle Order Management to modify the charge line after you submit it.

12. Select the Order Status subtab.
13. The Order Number field displays the RMA number you can give to the customer to use for their equipment return.
14. Use Oracle Order Management to book the order as described by *Oracle Order*

Management User's Guide. Booking the order notifies the receiving warehouse to expect the return and the shipping warehouse to send out the replacement.

15. You can monitor the progress of the return by viewing the status displayed in the Line Status field on the Order Status subtab.

Creating a Charge Line for a Return

Use this procedure to create the charge line for the equipment the customer is returning.

To create a charge line for the return:

1. Select the Action subtab.

2. Optionally, change any of the following defaulted fields:

   - Charge Line Type

     The default value is Actual. Do not change this setting unless you are preparing an estimate that requires customer approval. (Any charge line you set to Estimate does not appear on the customer invoice.)

     - Operating Unit

       The default operating unit is the one to which the transaction is debited. This values is specified by the administrator.

     - Business Process

       The default value is based on the service request type. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

3. Using the Service Activity LOV, specify the purpose of the charge (for example: Return for Replacement). our selection must have a line category type of "Return".

4. Enter the inventory item number for the item being returned. You must do so even if you are creating the charge line for an item in the customer's install base.

   Rev (Revision), Billing Type, and UOM (Unit of Measure) are displayed automatically.

5. Enter the quantity of the item being returned as a negative number. If the item is tracked by the install base or serialized then this quantity must be `-1`.

6. Select the Pricing subtab.

The UOM and Quantity fields are carried over from the Activity tab.

The currency displayed in the Billing Currency field is defaulted from the price list and may not be the same as the currency the customer used in payment.

The List Price reflects the price as listed on the price list; not necessarily what the customer paid for the item.

7. If you want to adjust the unit price, you can do so by modifying the Override Unit Price.

   The Extended Price is the Override Unit Price multiplied by the quantity.

   If a contract applies, the contract discount appears in the Contract Discount Amount.

   The Net Price is the extended price minus the contract discount amount.

8. If you want to adjust the total price or the amount of credit the customer receives, you can do so by modifying the amount in the Net Price field.

9. If the item the customer is returning is registered in Oracle Install Base or Oracle Asset Tracking, then select the Item Instance tab and enter the item using the Instance Number or Tag Number LOVs.

   Note: Entering an install base item does not automatically populate the item number in the Action tab.

10. On the Item Instance subtab, enter a date by which the customer is supposed to return the item in the Return By Date field.

11. The application automatically applies the billing address and other billing information you entered in the service request's Address tab. If you want to change it or review it, then select the Bill To subtab. You can make alternate selections using the lists of values provided:

    - Bill to Party: the default value is the customer as it is normally the customer who is responsible for payment or receives credit for the return, but you can select a different party.
    - Bill to Address: The billing address.
    - Bill to Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

12. Select the Order Details subtab.

13. If you know the warehouse that receives the return, then use the Shipping/Receiving Warehouse LOV to select it.

14. Do not select the Rollup check box as it does not apply to returns.

15. The application automatically adds the charge line to an open order, but if you want to specify an order to add this transaction to, then:

    1. Select an order from the Add to Order LOV.

    2. Enter an order number using the Order Number LOV.

16. Make sure the OM Interface check box is selected. The charge line is not sent to Oracle Order Management unless it is.

17. Save your entries by clicking **Save** on the toolbar.

18. You are now ready to enter the item you are sending out as a replacement. See Creating the Charge Line for a Replacement, page 54-18.

Creating the Charge Line for a Replacement

Use this procedure to create the charge line for the replacement unit the customer is to receive.

To create the charge line for the replacement:

1. Select the Action subtab.

2. Optionally, change any of the following default values:

    - Charge Line Type

      The default value is Actual. Do not change this setting unless you are preparing an estimate that requires customer approval. (Any charge line you set to Estimate does not appear on the customer invoice.)

    - Operating Unit

      The default value is the organization which recognizes the debit or credit from this transaction. The available values are specified by the administrator.

    - Business Process

      The default value is based on the service request type. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

3. Using the Service Activity LOV, specify what the purpose of the charge line (for

example: Replacement). The values in this LOV are determined by the administrator.

4. Enter the inventory item number for the item being shipped out as a replacement.

   Rev (Revision), Billing Type, and UOM (Unit of Measure) fields are displayed automatically.

5. Enter the quantity of the item being shipped as a positive number.

6. Select the Pricing subtab.

   The UOM and Quantity fields are carried over from the Activity tab.

   The currency displayed in the Billing Currency field is defaulted from the price list.

   The List Price reflects the price as listed on the price list.

7. If you wish to adjust the unit price, you can do so by modifying the Override Unit Price.

   The Extended Price is the Override Unit Price multiplied by the quantity.

   If a contract applies, the contract discount appears in the Contract Discount Amount.

   The Net Price is the extended price minus the contract discount amount.

8. If you wish to adjust the total price, you can do so by modifying the amount in the Net Price field.

9. The application automatically applies the billing address and other billing information you entered in the service request's Address tab. If you want to change it or review it, then select the Bill To subtab. You can make alternate selections using the lists of values provided:

   - Bill To Party: normally it is the customer who is responsible for payment or receives credit for the return, but you can select a different party.

   - Bill To Address: The billing address.

   - Bill To Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

10. The application automatically copies the shipping address and other shipping information you entered in the service request's Address tab. If you want to change it or review it, then select the Ship To subtab and use the LOVs provided for updates:

    - Ship To Party: Normally it is the customer who is responsible for paying the shipping, but you can select a different party.

- Ship To Address: The shipping address.
- Ship To Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

11. Select the Order Details subtab.
12. If you know the warehouse that ships the product, then use the Shipping/Receiving Warehouse LOV to select it. Leaving this field blank lets Oracle Order Management choose the warehouse for you.
13. Do not select the Rollup check box as it does not apply to returns.
14. Oracle Order Management automatically adds the charge line to an open order, but if you want to specify an order to add this transaction to, then:
    1. Select an order from the Add to Order LOV.
    2. Enter an order number using the Order Number LOV.

       The application administrator can also set up the application to create orders in "Booked" status.
15. Make sure the OM Interface check box is selected. The charge line is not sent to Oracle Order Management unless it is.
16. You are now ready to complete the return as described in Creating a Return for Replacement, page 54-14.

Creating a Return for Repair

To create a return for repair follow the procedure described in Creating a Return for Credit, page 54-11. On the Pricing tab, select the No Charge check box. This sets the price to zero as the customer does not want credit for the return. The rest of the return for repair procedure is carried out in Oracle Depot Repair. See the *Oracle Depot Repair User Guide* for details.

Reviewing and Submitting Field Service Charges for Billing

Use this procedure to charge customers for field service tasks that have been debriefed and closed. Your administrator also can set up charges to be submitted automatically, so that you do not need to review and submit field service charges for billing.

Depot Repair charges are generally submitted using the Depot Repair Workbench.

You cannot update or resubmit charge lines after they have been submitted. Submitted charge lines appear as read-only.

Prerequisites

You must have a service request with debrief lines to review.

To review and submit field service charges for billing:

1. Display the service request in the Service Request window.
2. Select the Charges tab.
3. Review the charge lines displayed on the subtabs. You can view the original sourced documents by following the procedure outlined in Viewing the Source of a Charge Line, page 54-21.
4. Click **Submit**.
5. Select the Order Status subtab.
6. The Order Number field displays the reference number you can give to your customer.
7. Use Oracle Order Management to bill the customer as described by *Oracle Order Management User's Guide*.

Viewing Pending Charges for Field Service Tasks

Use this procedure to view pending charges for service request tasks that have been entered by field service agents but not yet closed.

Prerequisites

Field service technicians must complete the debrief for the tasks.

To view pending charges:

1. Display the service request in the Service Request window.
2. Select the Charges tab.
3. Click **Auto Generate**.

   The application displays information on pending charges for all tasks with an in progress status. These are tasks that have been debriefed but not yet closed.

Viewing the Source of a Charge Line

If a charge line originates form an Oracle Field Service debrief or from an Oracle Depot Repair repair order, you can use this procedure to view the original documents.

To view the source of a charge line:

1. Display the service request in the service request window.
2. Select the Charges tab and the Source subtab.
3. Select the charge line.
4. If the charge line is for a repair, then the Original Source Doc field displays Service Request or Depot Repair, depending on where application the charge line was created.

   If the RMA or shipment line was created in Oracle Depot Repair, then click **Source** to display the depot repair order.

   If the RMA or shipment line was created in Charges, then:

   1. Select Depot Repair using the Current Source Doc list of values (LOV).
   2. Click **Source** to display the depot repair order.

5. If the charge line was created through an Oracle Field Service debrief, then click **Source** to display the debrief.

   The Original Source Doc displays Service Request and Current Source Doc displays Service Debrief. The number of the debrief document appears in the Current Source Number field.

Viewing a Report of Charges for a Service Request

You can view a report of the current charges for a service request in a browser window by clicking the **Charges Report** button on the Charges tab.

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Charges User Procedures in HTML Interface

This chapter covers the following topics:

- Overview
- Creating a Charge Line
- Submitting Charges Manually
- Viewing Pending Charges for Field Service Tasks
- Viewing the Source of a Charge Line
- Viewing the Status of Submitted Orders and Invoices
- Creating a Charge Line for a Return
- Creating a Charge Line for a Replacement
- Viewing Cost Details
- Searching for Parts

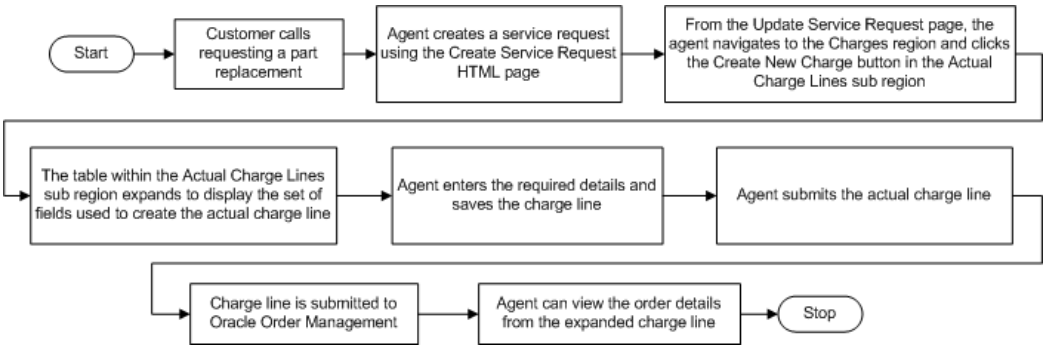
Overview

Agents in a call center create service requests when customers call with a specific request. They bill their customers for services, request for parts, returns, or exchange of parts when Oracle Order Management creates the invoice.

The HTML Charges feature in Oracle TeleService enables agents to create actual charges, estimate charges and submit charges to Oracle Order Management.

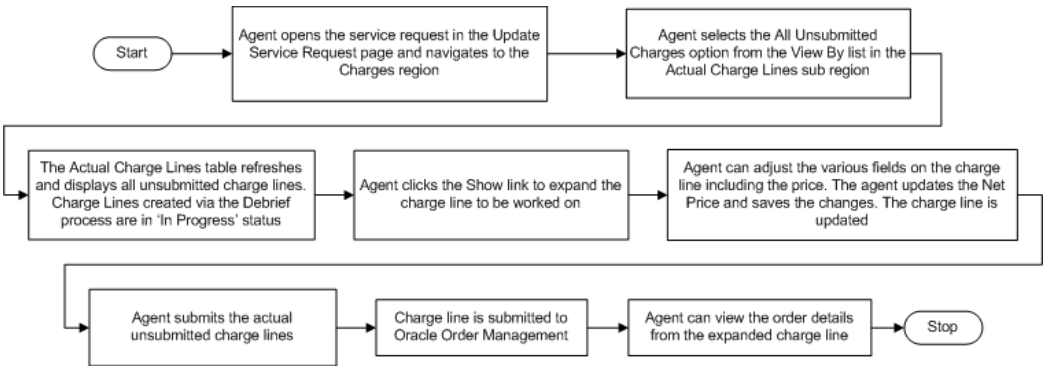
The following diagrams illustrate typical scenarios when agents need to bill their customers.

Shipping Replacement Parts to Customer



In the above diagram when a call center receives a customer call requesting for a part replacement, the agent creates a service request using the Create Service Request HTML page. The agent navigates to the Update Service Request page and then to the Charges region to create a charge for the part replaced. The agent enters all details regarding the charge and saves it. After the part has been replaced the agent submits the actual charge. The charge details are submitted to Oracle Order Management and the agent can view the corresponding order details in the Charges page.

Agent Adjusts Price of a Debrief Created Charge Line



In the above diagram the agent adjusts the price for a Debrief created charge line. Agents can adjust the net price for a Debrief created charge line and submit these charge lines from the Charges page. After the charges lines are submitted to Oracle Order Management an invoice is created for it. The invoice details can be viewed in the Charges region under the Order sub region.

Users can access the charges functionality even from Customer Support HTML, Dispatch Center, and Field Service Technician Dashboard. Forms users can also access the charges HTML functionality via the standalone Charges page.

Creating a Charge Line

Prerequisites

A service request must be created.

Responsibility

Customer Support Specialist, Vision Operations

To create a charge line:

1. Navigate to Support Specialist, Vision Operations, then Agent Dashboard.
2. Search for your service request.
3. Select Charges and Logistics from the Actions list.
4. Click the Add New Charge button in the Actual Charge Lines section.
5. Enter the following Item details.
    - Operating Unit

      The operating unit is an entity used by financial applications to create, process, and report on financial data. This value is displayed based on the organization, which recognizes the debit or credit from the charge line. The default operating unit is displayed based on the setup defined in the Multi Org Setup window.

    - Business Process

      This value is based on the service request type, for example, Customer Support, Depot Repair, and Field Service.

    - Service Activity

      Enter the purpose of this charge line, for example, Diagnostics, Advanced Exchange, and Repair and Return

      The values for the service activity are specified by the administrator.

    - Billing Type

      The billing type for the charge line. The billing type is can be any one of the following:

        - Labor
        - Material
        - Expense

    - Item

      Enter the item name, for example, AS54888. If an item is specified, then the billing type is displayed automatically based on the service activity and item combination.

- Quantity

  If you are entering a return the quantity must be negative. If the return is for an installed base item or a serialized item, the quantity must be -1. In the latter case a charge line must be created for each item return.

- UOM

  Unit of measure. The value defaulted in this field depends on the item you selected.

6. Enter the Return/Recovered Item Instance details

   - Serial Number

     Item's serial number.

   - Item Instance

     Oracle Installed Base identification number. This may be a required field depending on the installed base transaction subtype setup.

     For a shipment line, this indicates the recovered instance for an installed base tracked item.

     For a return line, this indicates the instance that is being returned (if the instance is an installed base tracked item).

   - System Tag

     Oracle Install Base tag number

   - Return Reason

     If you are creating a return, then enter the reason for retuning the item.

   - Return By Date

     Enter a date by which the customer is supposed to return the item. This may be a required field depending on the installed base transaction subtype setup.

   - Item Name

     Inventory number of the labor, material, or expenses item.

   - Item Description

     Description is automatically populated based on the selected item

   - Item Revision

     Revision code for the inventory item. This field is enabled automatically when you enter an inventory item number that is revision controlled.

7. . Enter the Parent of Recovered Item Instance details for a return or a recovered material item. Here you can view the parent instance details of the recovered item. The parent instance details determine the configuration of the product, which is passed to Order Management when the charge lines are submitted. This ensures proper update of the install base when the return item is shipped.

    - Parent Instance

      Parent instance of the shipment item.

    - Parent Item Name

      Parent of the item being recovered.

    - Parent Item Description

      Description of the parent item.

    - Parent Item Serial Number

      Parent item's serial number.

    - Parent Item Service Tag

      Oracle Install Base tag number.

8. Enter the Pricing details. Here you can view the list price for the item and override it. If you do not want to charge the customer for this line, then select the Zero Charge check box.

    - Price List

      The price list is used to determine the pricing of the item. If a price list is specified on the service request, then you can also select to default the price list from the service request header rather than from the sealed contract or the profile *Service: Charges – Default Price lis*t.

    - Currency

      The billing currency for the charge. Set the Service: Enable Currency Conversion in Charges UI profile option to *Yes* to change the default billing currency. The currency LOV displays the base currency of the price list, in addition to any currencies listed in the currency conversion list associated with the price list.

    - List Price

      The price of the item from the price list or, for expenses, the currency amount you entered in the Action tab.

    - Override Unit Price

You can use this field to adjust the unit price.

- Extended Price

  Read-only field that displays the Override Unit Price times the quantity.

- Contract Discount Amount

  Read-only field that displays the discount based on the contract entered in the Contract Number field on the Pricing Rules subtab.

- Net Price

  The extended price minus any contract discount. You can adjust this price that appears on the customer invoice.

- Contract

  Number of the contract, which applies to this charge line. The value is displayed by default based on the contract applied to the service request as a whole, but you can choose a different contract using the list of values.

- Coverage

  Read-only field detailing what the contract covers

- Rate Type

  You can choose a rate type for labor items. The Rate Type field is enabled if the chosen item's billing type is Labor and the selected contract includes a labor rate.

- Customer Purchase Order

  Number of the customer purchase order. This number appears on the invoice.

- Zero Charge

  Select this check box if you do not want to charge the customer for this line.

9. The billing address for the customer invoice is displayed by default from the service request. You can modify the following address information.

   - Bill To Party

     Party that is to receive the invoice.

   - Bill To Account

     Account that is debited or credited for the transaction.

   - Bill To Address

Address where the invoice is sent.

- Bill To Contact

  You can enter a contact here for information only. The contact does not get passed to Oracle Order Management.

- Credit Card Number

  Select the credit card number from the list of credit cards associated with the Bill To account. Based on the credit card number selected, information in the Card Type, Card Holder, and the Expiry Date fields is automatically displayed. To add or update a credit card, click the Create/Update Credit Card button.

10. Shipping information for the charge line is displayed by default based on the shipping details provided in the service request. If you are shipping an item in this charge line and wish to view it or select a different address, then you can modify the following shipping details.

    - Ship To Party

      Party that is to receive the shipment.

    - Ship To Account

      Oracle Order Management requires an account number entered in this field to recognize the shipping address. The customer is not charged on this account.

    - Ship To Address

      Address where the item is sent. This address is displayed based on the value set in the Service: Validate Bill To and Ship to LOVs profile. If the profile is set to *By Account Sites*, then the LOV displays the list of active Ship To party sites that have corresponding active account sites, if an account number is selected on the charge line. If the account number is not selected on the charge line, the LOV does not display any value. If the profile is set to *By Party Sites*, then the LOV displays the list of active Ship To party sites for the selected party.

    - Ship To Contact

      You can enter a contact here for information only. The contact does not get passed to Oracle Order Management.

11. View the order details. This includes the order numbers where the different charge lines have been added, the status of each order as well as the invoice number and date.

    - Need by Date and Time

      Optionally, specify the date by which you need the required parts to filter out

the inventory organizations, which have a higher estimate arrival date and time than the need by date and time.

You can specify the need by date only if the profile *Service: Enable Ship Sourcing Rules* is set to *Yes*.

- Inventory Organization

  Name of the inventory organization. The cost of the item on the charge line is determined based on the inventory organization.

  The inventories displayed include all active inventory organizations as defined in the Spares Planner's Desktop if the profile *Service: Enable Ship Sourcing* is set to *Yes*. If this profile is set to *No*, then the inventories displayed include all active inventory organizations.

  Click the Search Parts button to display the Part Search page from where you can find parts in different inventory organizations. You can search for parts only if the profile Service: Enable Ship Sourcing is set to Yes.

- Sub Inventory

  Name of the sub inventory organization. This field is enabled when an inventory organization is selected. If the profile *Enable Ship Sourcing* is set to *Yes* , the LOV lists all subinventories as defined on the Spares Planner's Desktop for the selected inventory organization. If the profile is set to *No*, the LOV lists all active subinventories for the selected inventory organization.

- Carrier

  Carriers are associated to the inventory organizations as per the Freight Carriers defined in Oracle Inventory. This list includes list of carriers defined for each inventory organization.

- Shipping Method

  Shipping method is displayed only for shipment lines based on the carrier selected if the profile *Service: Enable Ship Sourcing Rules* is set to *Yes*.

  If a carrier is not specified, the LOV displays shipment methods across carriers defined for the selected inventory organization using the Freight Carriers setup defined in Oracle Inventory.

- Arrival Date / Time

  The arrival date is displayed if the *Service: Enable Ship Sourcing Rules* profile option is set to *Yes*. This is a read-only value and is populated based on the value specified in the Part Search page or recalculated based on selections on the charge line.

- Return Type

The return type is used by the Spares API as one of the parameters in determining the default inventory organization or sub inventory.

- Shipping Distance

  The distance from the ship-to address and the shipping warehouse. The shipping distance is displayed only for shipment lines if the distance is calculated for the warehouse and there is quantity available for shipping, and the profile Service: Enable Ship Sourcing Rules is set to *Yes*.

- Roll Up

  Optionally, you can simplify customer invoices by grouping all charge lines under the generic headings of time, material, or expenses by selecting the Rollup check box.

  This way the different charge lines for pens and for stationery appear on the invoice as expenses, for example, and the charge lines for straight time, overtime, and time and half appear under the simple heading of time. Selecting the Rollup check box, substitutes the generic inventory item on the customer invoice. Your administrator must set this substitution up in the Billing Type Attributes setup window.

- Add to Order Number

  Specify the order number to add the charge lines. This value is defaulted from the service request header if a sales order number is specified for the customer account.

- Item Disposition

  Displays the disposition defined for the selected shipment or return item and selected inventory organization on the charge line.

- Order Management Interface

  Select this check box if you want this charge line to be passed to Oracle Order Management.

12. View the project details selected for the charge line. This information determines which project to associate the costs related to the charge line. The project information on the charge line is displayed based on the setting in the *Service: Default Project Information from Service Request* profile. If the profile is set to *Yes*, project related values saved in the service request information are displayed, by default in the project related fields on the charge line or debrief line. You can modify the default values.

    - Expenditure Org

      The expenditure organization of the project associated with the charge line. The

expenditure organizations are displayed based on the operating unit selected on the service request.

- Project Number

  Number of the project. All project numbers belonging to the selected operating unit are displayed.

- Project Name

  Name of the project.

- Project Task Number

  Number of the project task.

- Project Task Name

  Name of the project task.

13. View the Source details. You can view information about the charge line source.
    - Original Source Number

      Original Source Number

    - Current Source Number

      Current Source Number

14. Click Apply.

Submitting Charges Manually

Prerequisites

You must create a service request with eligible charge lines.

Responsibility

Customer Support Specialist, Vision Operations

To submit charges manually:

1. Navigate to Support Specialist, Vision Operations, then Agent Dashboard.
2. In the Quick Find region, select Service Request Number from the Search By list.
3. Enter the service request number and click Go. The Update Service Request page appears.

4. Select Charges and Service Logistics from the Actions list. The Charges page appears.

5. In the Charges region, click Submit Charges.

6. Successfully submitted charge lines show a Status of "Submitted".

Viewing Pending Charges for Field Service Tasks

Use this procedure to view pending charges for service request tasks that have been entered by field service agents but not yet closed.

Prerequisites

Field service technicians must complete the debrief activity for the tasks.

To view pending charges for Field Service tasks:

1. 1. Display the service request in the Service Request window.

2. 2. Select Charges and Service Logistics from the Tools2 menu. The Charges page appears.

3. 3. In the Actual Charge Lines region, click Auto Generate. The charge lines are displayed in the Actual Charge Lines table with a status of 'In Progress' in the Service Request window.

   The application displays information on pending charges for all tasks with an in progress status. These are tasks that have been debriefed but not yet closed.

   For more information, refer Debriefing Work Completion, Oracle Field Service User Guide.

Viewing the Source of a Charge Line

Use this procedure to view the original documents if a charge line originates form an Oracle Field Service debrief or from an Oracle Depot Repair repair order.

To view the source of a charge line:

1. Navigate to Support Specialist, Vision Operations, then Agent Dashboard.

2. In the Quick Find region, select Service Request Number from the Search By list.

3. . Enter the service request number and click Go. The Update Service Request page appears.

4. Select Charges and Logistics from the Actions list. The Charges page appears.

5. Click the Show link for the charge line whose source you want to view.

   If the charge line is for a repair, then the Original Source Doc field displays Service Request or Depot Repair, depending on where application the charge line was created.

   The Original Source Doc displays Service Request and Current Source Doc displays Service Debrief. The number of the debrief document appears in the Current Source Number field.

Viewing the Status of Submitted Orders and Invoices

Use this procedure to view the progress of an order for charge lines that have been submitted to Oracle Order Management.

To view the status of orders and invoices:

1. Display the service request in the Update Service Request page.
2. Select the Charges and Service Logistics option from the Actions list.
3. Click Go.
4. Scroll down to the Order Status region.
   - The confirmation number is displayed in the Order Number field. Click the order number link to drill down to the order details including shipping and billing information in Oracle Order Management. For more information, see Viewing Sales Order Details, Oracle Order Management User Guide.
   - The invoice number and the invoice date display in the Invoice Number and Invoice Date fields respectively.

Creating a Charge Line for a Return

Use this procedure to create the charge line for any equipment the customer is returning.

To create a charge line for a return:

1. Navigate to Support Specialist, Vision Operations, then Agent Dashboard.
2. In the Quick Find region, select Service Request Number from the Search By list.
3. Enter the service request number and click Go. The Update Service Request page appears.

4. Select Charges and Logistics from the Actions list. The Charges page appears.

5. Select Field Service from the Business Process list.

6. Select Return Loaner from the Service Activity list.

7. Enter the inventory number of the item being returned. You must do so even if you are creating the charge line for an item in the customer's install base.

   The Rev (Revision), Billing Type, and UOM (Unit of Measure) fields are automatically displayed.

8. In the Item Instance region, enter a date by which the customer is supposed to return the item in the Return By Date field.

9. Enter the quantity of the item being returned as a negative number. If the item is tracked by the install base or serialized then this quantity must be -1.

   The currency displayed in the Billing Currency field is defaulted from the price list and may not be the same as the currency the customer used in payment.

10. The List Price reflects the price as listed on the price list; not necessarily what the customer paid for the item.

11. Modify the Override Unit Price if you wish to adjust the unit price of the item.

    The Extended Price is the Override Unit Price multiplied by the quantity.

12. You can modify the amount specified in the Net Price field if you want to adjust the total price or the amount of credit the customer receives.

13. If the item the customer is returning is registered in Oracle Install Base or Oracle Asset Tracking, then enter the item details using the Instance Number or Tag Number lists.

14. Do not select the Rollup check box as it does not apply to returns.

15. The application automatically adds the charge line to an open order, but if you wish to specify an order to add this transaction to, then:

    - Select an order from the Add to Order Number list.

    - Enter an order number using the Order Number list.

16. Make sure the OM Interface check box is selected. The charge line details are not sent to Oracle Order Management unless this check box is selected.

17. Click Save.

Creating a Charge Line for a Replacement

Use this procedure to create the charge line for a replacement that the customer is to receive.

To create a charge line for a replacement:

1. Navigate to Support Specialist, Vision Operations, then Agent Dashboard.
2. In the Quick Find region, select Service Request Number from the Search By list.
3. Enter the service request number and click Go. The Update Service Request page appears.
4. Select Charges and Service Logistics from the Actions list.
5. Click Go.
6. Select Field Service as the business process. The business process is displayed by defaulted based on the service request type selected. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.
7. Select the Service Activity. The service activity specifies the purpose of the charge line. In this case, it can be replacement.
8. Enter the name for the item being shipped out as a replacement. The Item Description and Item Revision are automatically displayed based on the item selected.
9. Enter the quantity of the item being shipped as a positive number.
10. The List Price reflects the price of the item as listed on the price list.

    If you wish to adjust the unit price, you can do so by modifying the Override Unit Price. The Extended Price is the Override Unit Price multiplied by the quantity.
11. If a contract applies, the contract discount appears in the Contract Discount Amount.
12. The Net Price is the extended price minus the contract discount amount.
13. If you wish to adjust the total price, you can do so by modifying the amount in the Net Price field.

14. The application automatically applies the billing address and other billing information you entered in the service request's address.

    You can make alternate selections using the lists of values provided:

    - Bill To Party: Normally it is the customer who is responsible for payment or receives credit for the return, but you can select a different party.
    - Bill To Account: The account number of Bill To Party.
    - Bill To Address: The billing address.
    - Bill To Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

15. The application automatically copies the shipping address and other shipping information you entered in the service request's address.

    - Ship To Party: Normally it is the customer who is responsible for paying the shipping, but you can select a different party.
    - Ship To Account: The account number of Ship To Party.
    - Ship To Address: The shipping address.
    - Ship To Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

16. If you know the inventory organization select it from the LOV. Leaving this field blank lets Oracle Order Management choose the inventory organization for you.

17. Do not select the Rollup check box, as it does not apply to returns.

18. Oracle Order Management automatically adds the charge line to an open order, but if you wish to specify an order to add this transaction to, then:

    - Select an order from the Add to Order Number list.
    - Enter an order number using the Order Number list.

    The application administrator can also set up the application to create orders in "Booked" status.

19. Click Apply.

20. Click Save.

Viewing Cost Details

You can view the cost details of the service request either from Oracle Projects or from Oracle TeleService. You can view the cost details relating to a cost record in Oracle Service. When using Oracle Projects, you can drill down to identify the source of the cost record details in Oracle Service from the expenditure item in Oracle Projects.

You can view all cost records for a particular service request in the service request update mode. If a project number and project task number are selected for the service request, you can drill down and view the project details in the Project Overview page.

In addition to the above, you can also specify the currency code as a parameter. In this case, all cost records are displayed in the currency specified and the costs are recalculated for the new currency.

You can view the following cost information. The cost details table can be personalized to display additional details.

- Cost ID
- Service Activity Code
- Item
- Quantity
- Unit Cost
- Extended Cost
- Currency
- Project Number
- Project Name
- Project Task Number
- Project Task Name
- Expenditure Organization
- Expenditure ID

The expenditure ID is a unique number and is displayed only if the charge line is interfaced and successfully imported and generated into an expenditure line in Oracle Projects. However, you can also generate costs without a corresponding charge line if the service activity code is set up to create cost, but not a charge line.

Searching for Parts

The ability to find parts quickly is a critical element of a successful field service operation. The Oracle TeleService application enables agents to search parts throughout the organization, the central warehouse, and other subinventories assigned to him.

The search results include items that match the specified search criteria by inventory. After you select the required part, the other item details are automatically displayed in the charge line. You can then save the charge line, update it, or submit the charge line.

You can search for parts from the Parts Search page. The Part Search page displays the following information specified on the charge line: Item, Item Description, Item Revision (if it is specified), the Ship to Address, Quantity, UOM, and the Need By Date.

The following table describes the other search criteria on the Part Search page:

Field	Description
Open Manned Warehouse	Displays all manned warehouses set up in the Planner's Desktop for which the item is defined and are currently open.
Include Supersessions and Substitutes	Displays sources with items that are defined substitutes or supersessions of the item selected on the charge line.
Include Closed Warehouses	Displays all closed warehouses set up in the Planner's Desktop for which the item is defined.
Use On-hand Instead of Available On-hand	Displays sources where the items needed are already reserved.
Search Distance (unit is determined by profile "CSF: Default Distance Unit")	Displays sources where the distance between the source and the ship-to address is less than the specified search distance.

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Service Costing User Procedures

This chapter covers the following topics:

- Capturing Costs
- Generating the Profit Margin Report

Capturing Costs

Based on the Service Activity Codes (SAC) setups, cost records are created when actual charge lines are created in the Service Request form. Whenever charge information is updated or deleted, the respective cost record is updated or deleted.

Costs can be captured in Customer Support, Field Service, and Depot Repair in the following scenarios.

Customer Support

For the Customer Support or Service Logistics scenarios, charges can be created manually in the Charges tab of the Service Request form. Customer Support Agent can enter the following charges:

- Create orders for shipments when shipping replacement equipment to the customer
- Create return orders (RMA): An RMA charge line may or may not actually generate an invoice for the customer. For example, if the product is under warranty, and the customer wants to exchange it, then no charge must be generated. If a customer chooses a more expensive replacement, then a charge for the difference must be created.
- Bill customers for any services provided to them.

Field Service

- In addition to the Customer Support scenarios, charges can be created from task debrief lines. Field service technicians use the Debrief UI to report on material, labor time, and expenses for individual task assignments.

Note: Cost records are created for the debrief lines when the task assignment status is changed to Completed and Create Cost is Yes.

Depot Repair

- Copying from Estimates
- Importing from WIP summary
- Creating charges from Task Debrief (Task Repair mode)
- Creating charges lines manually in the Repair Order UI.

Note: In the Task Repair mode, the Field Service API is used to process debrief lines and create charges lines from those task debrief lines. Cost records are created when the task assignment status of the Debrief is changed to Completed and Create Cost is Yes.

Generating the Profit Margin Report

To generate this report from the Service Request form:

1. Under the Customer Support responsibility, navigate to Create Service Request and open the Service Request form.
2. Select Profit Margin Report from the **Tools2** menu.
3. Select Profit Margin Report from the Template list of values and click **Run**.

To generate this report from the Update Service Request page (HTML):

1. Under the Customer Support Specialist responsibility, navigate to Queued Work Selection and open the Agent Dashboard.
2. Search for a service request using Quick Find.
3. Select Profit Margin Report from the Actions LOV and click **Go**.

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User Procedures for Oracle Telephony Integrations

This chapter covers the following topics:

- About Oracle Telephony User Procedures in Oracle TeleService
- About Receiving Inbound Calls
- Sharing Customer Information While Conferencing or Transferring Calls
- Handling a Web Callback in the Contact Center
- Handling a Web Callback in the Service Request Window
- About Calling Customers
- Calling Customers from the Contact Center
- Calling Customers from the Service Request Window
- Switching Between Web Callback and Inbound Queues
- Quitting the Application When Telephony Is Enabled
- Viewing Information About a Call
- Wrapping Up a Call
- Ending an Interaction Without Entering Call Wrap Up Information

About Oracle Telephony User Procedures in Oracle TeleService

Oracle TeleService agents interact with telephony functionality via the Oracle Oracle Universal Work Queue and its Work Controller (Softphone).

> **Note:** If you decided to hide the Softphone as part of your implementation, then you can use the physical telephone set to achieve the same functionality as that mentioned below for the softphone. The

only exception is the handling of Web callbacks which must be done with the Softphone.

The topics and procedures in this section highlight a few aspects of telephony important to Oracle TeleService. For detailed operation instructions on the softphone please see *Oracle Universal Work Queue User Guide*.

- About Receiving Inbound Calls, page 57-2
- Sharing Customer Information While Conferencing or Transferring Calls, page 57-4
- Handling a Web Callback, page 57-6
- Switching Between Web Callback and Inbound Queues, page 57-9
- Quitting the Application When Telephony Is Enabled, page 57-9

About Receiving Inbound Calls

When someone calls your organization, Oracle Advanced Inbound tries to determine the caller's identity based on the phone number or the information the caller has provided to the Interactive Voice Response (IVR) system. Customers can enter a unique identifier, such as an order number, and a call reason, indicating they want to create a service request.

The application displays the customer information either in the Contact Center or the Service Request windows, depending on the setups performed by the application administrator.

No matter what information the application displays about the customer, the agent must always verify that it is correct. The caller may be calling from someone else's phone or about someone else's service request, or has made a mistake in entering the service request number that just happens to match an existing service request number.

The application behaves differently if the customer information matches a unique record or not.

Unique Customer or Contact

When the caller's phone number matches a unique customer or contact phone number, the application displays that party's record in the Contact Center or Service Request window.

If the customer is making an inquiry, the Find Service Request window appears with a list of the open service requests for that party. If the customer is calling to log a service request, the Service Request window appears with the party details.

Multiple Customers and Contacts

When the caller's phone number matches the phone number of more than one customer or contact, the application displays the Customer Search window within the Contact Center, populated with all the matching records.

This can occur when a number of people share the same phone line or when the contact's phone number is the same as the phone number of the organization that the contact works for.

You must select one of the parties listed and click **OK**.

The party you select depends on the context of the call.

For example, if the number the caller is calling from matches:

- The main phone number of your customer General Technologies (a party of Organization)
- The personal phone number of Mel Bordeaux (a party of Person)
- The work number of Mel Bordeaux who works for General Technologies. (Contact for General Technologies)

You select different party types depending on what the caller is calling about:

If the caller:	You select:
Is the person listed and is calling with a personal request	The party of Person. This is the individual listed without affiliation to any organization.
Is the person listed and is calling with a request on behalf of the organization	The person with a relationship to the organization.
If you determine the caller is not the person listed.	The organization itself.

The application administrator can also set up the application to display the Find Service Request window, listing the matching service requests for the party.

When No Customer or Contact Records Match

When the application does not find any matches for the caller's phone number or the other information the caller has provided, you receive a blank Contact Center or the Service Request window, depending on how your administrator sets up the application.

In the Contact Center, you must search for the customer record manually by using the lists of values or the Customer Search window, available by clicking **Search** in the

toolbar.

In the Service Request window, if the caller is making an inquiry on an existing service request, the Find Service Request window appears. You can use this window to search existing service requests. If the caller wishes to log a service request, a blank Service Request window appears, so that you can create a new service request.

When a Caller Enters a Unique Identifier or Call Reason

Customers can enter both, a unique identifier such as an order number, and a call reason, indicating they want to create a service request. The information the customer enters determines how the Contact Center or Service Request forms open.

In the Contact Center, the default tab and mode depends on the setup of the application and the information the customer enters into the IVR:

- If the customer enters a call reason, this information determines the default tab and the mode.
- If the customer does not enter a call reason, the identifier is used to determine the default tab and mode.

In the Service Request window, the identifier and/or the call reason determine the window and the mode. The default tab within the Service Request window is determined by a profile option.

Sharing Customer Information While Conferencing or Transferring Calls

While working in the Contact Center or the Service Request window, you can use the icWork Controller (or the physical phone set) to transfer or conference a customer together with the customer information displayed on your screen to Tier-1 agents using the Contact Center or specialists using the Service Request window. It is also possible for agents logged into either the Contact Center or the Service Request window to transfer calls to users logged into the Oracle E-Business Center.

For example, if you are transferring or conferencing a call while working on a service request in the Contact Center's Service Request tab, the application displays the same Service Request tab and Contact Center information for the second agent. You can also pass service key information or unique identifiers entered in the IVR by the customer. This ensures that the customer does not need to repeat identifying information.

> **Note:** Conferencing is not the same as screen sharing. Screen sharing permits two or more people to work together while sharing the same screen. Conferencing displays the same customer information to a second agent, but both of you can continue to work in independent windows so you do not see what the other agent is doing.

If you have multiple windows open, the application displays the Contact Center for the

second agent regardless if it is active. For example, if you are viewing a customer's service request in the Service Request window and have the Contact Center in the background, the transfer or conference call uses the Contact Center window.

> **Note:** If you are using the Contact Center or the Service Request window with standard service request security on, you should be aware that service request security is enforced during call transfer and conferencing. If you try to transfer a call for a service request to another agent, the agent cannot receive the call if he does not have access to the service request type. This also applies to conferencing.

Prerequisites

You must be on the phone with a customer.

To transfer customer information when conferencing or transferring a call:

1. Click **Save** on the toolbar to save any work you are doing. This ensures the second agent receives the latest information.

2. Transfer or conference the call using the Softphone as described in Using the icWork Controller section of the *Oracle Universal Work Queue User Guide*. This procedure is slightly different depending on the type of telephony hardware your organization uses.

3. Two agents cannot work on the same record at the same time, so if you do continue to work after the conference or transfer is initiated, you must ensure that you are not both updating the same information.

   Both agents can create notes and tasks because these create separate records, for example, but they cannot modify the customer's address or contact information at the same time. If you do attempt to modify the same record, only one of you can save your work.

4. End your interaction with the customer either by clicking the End Interaction or Call Wrap-up buttons.

   If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you don not have to click End Interaction.

   > **Note:** If you wish to see the results of any work done by the second agent, you must requery the customer record.

Handling a Web Callback in the Contact Center

Use this procedure to call a customer in response to question they have entered on the Web. Customers can request an agent to call them back by filling out a Web form in iSupport with their phone number, the time they wish to be called, and their question.

When you are logged into the Web Callback work queue in the Universal Work Queue, the application automatically dials the customer number for you and displays customer details in either the Contact Center or the Service Request window. The customer's question appears as a note.

> **Note:** You must use the Softphone for Web callbacks. You cannot use your physical phone.

Prerequisites:

You must log into the Web Callback queue in the Universal Work Queue.

To handle Web callbacks:

1. When you are assigned a Web callback, the Contact Center appears automatically showing the details of the customer who requested the callback. The application dials the customer number displayed in the icWork Controller (Softphone).
2. Click the flashing green line button on the Softphone to talk with the customer.
3. Select the Notes tab to view the customer's question.
4. When you are done speaking with the customer, then close the interaction either by clicking End Interaction or Call Wrap-up icon on the toolbar to indicate you are ready for the next call back.

   If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you will not need to click End Interaction.

Handling a Web Callback in the Service Request Window

Use this procedure in the Service Request window.

Prerequisites:

You must log into the Web Callback queue in the Universal Work Queue.

To handle Web callbacks in the Service Request window:

1. When you are assigned a Web callback, the Service Request window appears automatically showing the details of the customer who requested the callback. The application dials the customer number displayed in the icWork Controller (Softphone).

2. Click the flashing green line button on the Softphone to talk with the customer.

3. Select the Workbench tab to view the customer's question.

4. When you are done speaking with the customer, then close the interaction either by clicking End Interaction or Call Wrap-up icon on the toolbar to indicate you are ready for the next call back.

   If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you do not have to click End Interaction.

About Calling Customers

The application makes it possible to dial customers with the click of a button or by entering customer number manually into the icWork Controller (Softphone) to make outgoing calls.

You can initiate a call to a customer from the Contact Center and the Service Request window.

Calling Customers from the Contact Center

Use the following procedures to initiate a call to customer from the Contact Center.

Prerequisites

You must log into UWQ and select a customer with a phone number.

To initiate a call from the Contact Points tab:

1. Display the Customer in the Contact Center.

2. Select a telephone phone number from the list of contact points.

   This activates the Initiate Call button.

3. Click **Initiate Call**.

   The icWork Controller window appears and dials the telephone number

automatically.

Note: You can also initiate a call to the primary phone number from the Contact Center header and the Report menu respectively.

- From the Contact Center header select, Initiate Call button to the right of the Phone field.
- From the Report menu, select Initiate Call.

Calling Customers from the Service Request Window

You can initiate a call from the following places within the Service Request window:

- From the toolbar: using the Call Customer icon.
- From the toolbar: using the Call Contact icon.
- From the Service Request header: using the Phone icon next to Contact Phone.
- From the Service Request header: using the Phone icon next to Customer Phone.

Prerequisite

You must log into UWQ and select a a service request with a customer or contact phone number.

To initiate a call from the Service Request window:

1. Navigate to the Service Request window.
2. Query a service request.
3. Select the Initiate Call button to the right of the Phone field for either the customer or the contact.

   The icWork Controller window appears, and dials the telephone number automatically.

   Note: You can also initiate a call to the Customer's primary phone or the Contact's primary phone from the toolbar.

   - Select the Customer Phone icon from the toolbar.
   - Select the Contact Phone icon from the toolbar.

Switching Between Web Callback and Inbound Queues

When you wish to switch media queues, from handling incoming calls to placing outbound Web callbacks or vice versa, you must remember to always click the Stop Media button before selecting the next queue. This ensures you are recognized by the application as ready to receive the next call.

To switch between Web Callback and Inbound queues:

1. Navigate to the Universal Work Queue.
2. Click Stop Media on the toolbar.
3. Select the next queue.

Quitting the Application When Telephony Is Enabled

Use the following procedure when you wish to close the application down at the end of the day or when you go on a break.

To quit the application:

1. :Save your work.
2. Close any interactions.
3. Close the Contact Center and Service Request windows.
4. Navigate to the Universal Work Queue.
5. Click Stop Media in the toolbar.
6. Close the Universal Work Queue window. This closes the icWork Controller (Softphone) automatically.

Viewing Information About a Call

Use this procedure to view information about a call of a customer on the phone.

Prerequisites

Oracle Inbound telephony must be implemented and a customer must be on the phone.

To view information about a call:

1. Click the Call Information icon on the toolbar of either the Contact Center header or

the Service Request header. This is the icon with a telephone and the letter "i".

The Information Window appears displaying information about the call. This includes information gathered automatically by Oracle Inbound and that entered by callers themselves.

2. Close the window by clicking **Close** on the window's title bar. This is the button in the upper right-hand corner that is standard in all applications.

Wrapping Up a Call

Use this procedure to record outcomes of your interaction with a customer and to review and update the activities recorded by the application.

The application administrator can set up the application to make call wrap up mandatory. See Setting Up Wrapup.

Prerequisites

An interaction must be in progress. You can tell if an interaction is in progress when the End Interaction icon in the toolbar is enabled. This is the traffic light icon with a red light.

To wrap up a call:

1. Click **Call Wrapup** in the toolbar of either the Contact Center window or the Service Request window.

   The Call Wrap Up window appears displaying the activities that are recorded in the interaction history.

2. If you wish to modify any of the listed activities, then make alternate selections using the list of values provided. Each activity can have its own outcome and result.

3. Not all customer-related activities are recorded automatically. If you wish to add additional activities to be recorded as part of your interaction, then:

   1. Click **New** in the toolbar.

   2. Use the lists of values (LOVs) to record the Action, Action Item.

   3. Enter the outcome of the activity using the Outcome LOV.

   4. Optionally enter the Result and Reason.

4. Click **OK**.

   Clicking OK ends your interaction and signals your telephony application that you are ready to accept the next call.

Ending an Interaction Without Entering Call Wrap Up Information

Use this procedure to end an interaction without entering call wrap-up information. The application automatically records the default outcome, result, and reason for the interaction.

Prerequisites

An interaction must be in progress. You can tell if an interaction is in progress when the End Interaction icon in the toolbar is enabled. This is the traffic light icon with a red light.

To wrap up a call:

Click **End Interaction** in the toolbar. This is the stoplight icon with the red light.

If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you do not have to click End Interaction.

A

Integrating Relationship Plans in Other Applications

This appendix covers the following topics:

- Integration Via Form-Level Triggers
- Overview of Integrating Relationship Plans
- Technical Overview
- Prerequisites
- Steps to Enable Modules in Relationship Plans
- Functionality of the Setup Form - CSCUTILS
- Enable Relationship Plans - Setup Window
- Outcomes Window
- Defining an Alert
- Limitations

Integration Via Form-Level Triggers

Integration can be achieved by coding one or more of the following form level triggers in the integration form:

- On Insert
- On Update
- Custom1
- Custom2

Overview of Integrating Relationship Plans

Modules within the CRM application must be integrated with each other to ensure smooth flow of data and business logic throughout the application. The Relationship Plans module within Customer Care enables organizations to set up plans that they can offer to their customers and ensure a constantly growing customer base.

The relationship plans module is a busy point of integration, because of the very fact that almost every other module within CRM needs to have a consistent view of all the existing plans in the application. To help in this integration process, the relationship plans module facilitates an "ENABLE PLAN" form, which enables other modules to integrate with relationship plans.

Technical Overview

This section provides a technical overview of relationship plans.

Forms Used: CSCUTILS.fmb - Setup Form and Outcomes Window

The tables used are:

- CSC_PLAN_ENABLE_SETUP
- OKC_PROCESS_DEFS_V

The packages and procedures are:

```
PACKAGE CSC_PLAN_OUTCOMES

PROCEDURE GET_OUTCOMES (
p_FUNCTION_ID                                 NUMBER,
p_TRIGGER_EVENT                               VARCHAR2,
p_PARTY_ID                                    NUMBER,
p_CUST_ACCOUNT_ID                             NUMBER,
p_END_USER_TYPE                               VARCHAR2 := NULL
p_APPLICATION_SHORT_NAME                      VARCHAR2,
p_MSG_TBL                                     OKC_AQ_PVT.MSG_TAB_TYP)
```

Description of Parameters:

- P_FUNCTION_ID - The integrating form function id from table FND_FORM_FUNCTIONS
- P_TRIGGER_EVENT - The triggering event that calls the outcomes. The valid values are INSERT, UPDATE, CUSTOM1, and CUSTOM2.
- P_PARTY_ID - Party Id from HZ_PARTIES.
- P_CUST_ACCOUNT_ID - Customer account Id from HZ_CUST_ACCOUNTS_ALL
- p_END_USER_TYPE - The end user type. AGENT or CUSTOMER

- P_APPLICATION_SHORT_NAME - The short name of the application from FND_APPLICATION.
- P_MSG_TBL - The msg_tbl has the following structure:
  1. ELEMENT_NAME VARCHAR2(4000)
  2. ELEMENT_VALUE VARCHAR2(4000)

     The element name is the name of the action attribute element name. The element value is the actual value of the element name.

Prerequisites

Prerequisites for enabling relationship plans include:

1. Relationship Plans have to be defined and attached to the specific customer.
2. Actions, Conditions, and Outcomes must be defined using the Events screens.

Steps to Enable Modules in Relationship Plans

The steps to enable modules in relationship plans are as follows:

1. Register the integrating module form with the relationship plan's setup form.
2. Attach library `CSCUTILS.pll` (from `$CSC_TOP/resource`) in the integrating form.
3. Subclass relationship_plans_outcomes and enable_relationship_plans object groups from the `CSCUTILS.fmb` form (from `$CSC_TOP/forms/US`).
4. Call `CSC_PLAN_OUTCOMES.GET_OUTCOMES` procedure from all of the above mentioned form level triggers. The outcomes are fired only for triggers that are enabled in the setup form.
5. Add the following code to the `APP_CUSTOM` package body in the integrating form:

```
if (wnd='OUTCOMES') then
cscutils_app_custom.close_windo('OUTCOMES');
--move focus to required block/field. for eg:
GO_BLOCK('target block');
end if;
```

6. Execute user defined triggers, Custom1 and Custom2 from the required integration point as follows.

```
execute_trigger('CUSTOM1');
```

Functionality of the Setup Form - CSCUTILS

This section describes the functionality of the CSCUTILS setup form.

Enable Relationship Plans - Setup Window

To enable a module for relationship plans, the module must register its form functions with the relationship plans' registering table called `CSC_PLAN_ENABLE_SETUP`. This can be done via the Enable Relationship Plans - Setup form.

The Function column specifies the integrating form function name.

The Application column specifies the application the form function belongs to.

The integrating module has four form level triggers which can be coded to achieve integration with the relationship plans module. They are:

1. On Insert
2. On Update
3. Custom1
4. Custom2

By checking one or more of these triggers, the enable plan APIs can be executed from the integrating module.

Outcomes Window

A relationship plan's outcomes can be of two types - synchronous and asynchronous. Asynchronous outcomes are fired immediately but the resulting outcomes are processed in the background. Synchronous outcomes are fired immediately and the results are shown in the Outcomes window. The user can then select or deselect the outcomes and execute them.

Outcome Name is the name of the outcome.

Outcome Type is the type of the outcome, such as Alert or Script.

Description is the description of the outcome, such as the alert text for alerts.

The Execute button executes the outcome.

The Cancel button closes the Outcome window.

Defining an Alert

To define an alert:

1. Create a message with the alert text as the message text. This is the same as defining an error message.

2. Define the outcome in the Process Definition screen. Use the same message name defined in step 1 for the outcome name.

3. Define the parameters for the outcomes. Use the same message token names defined step 1 as the parameter names.

4. For more information about defining outcomes, refer to Events documentation.

Limitations

Defining a plan which has only one outcome to be fired raises no issues. The outcome is fired and the control passes on normally to the next logical step. If there are two or more outcomes to be fired, the control passes to the OUTCOMES block which lists the different outcomes and the user can select which of the outcomes are to be executed. This raises a potential error situation if the enable relationship plans triggers are called from triggers that do not permit restricted procedures to be part of their code. This is due to the fact that there is a GO_BLOCK statement executed in the GET_OUTCOMES program unit when transferring control to the OUTCOMES block to display the various outcomes.

You must make sure that the form functions integrating with the Relationship Plans module takes into account the above situation and performs the right code calls. A workaround for the above scenario would be to create a timer and then execute the Enable Relationship plan trigger from the WHEN-TIME-EXPIRED trigger.

B

Frequently Asked Questions About Setting Up Relationship Plans

This appendix covers the following topics:

- Frequently Asked Questions About Relationship Plans

Frequently Asked Questions About Relationship Plans

What does Plan Type mean?

Relationship Plans can be of two types:

- Template Plan - This type of plan can be associated with any customer.
- Customized Plan - This type of plan is created only for specific customers.

Can a customized plan be created when the Define Relationship Plan responsibility is invoked?

No, a customized plan can be created only when a plan already exists and is associated to a group of customers. This plan can then be customized for a specific subgroup of those customers. When a plan is customized, a new plan is created in the application.

What is the Account Level check box in the Define Plan form?

Plans can be associated to customers at two levels.

- Party Level, in which case this check box is deselected. Party Level plans can be associated to customers only at party level. This means the plan is associated to all the customer accounts as well.
- Account Level, in which case this check box is selected. Account Level plans can be associated to customers only at account level. This means the plan is associated to a specific account of the customer and not to all the accounts.

What is the Group Name field in the Define Plan form?

Plans can be grouped together to form a logical set of plans. This group of plans can then be associated to customers and the customer gets the benefits and outcomes of all plans in the group. This functionality is not yet implemented.

Sometimes the Low Value and High Value values cannot be modified. Why is this?

These fields define the Relationship Plan header criteria. For example, consider the following Plan definition:

Open Service Requests > 5

This plan is associated to customers who have more than five open service requests. Assume that Customer A has eight open service requests. If you try to modify the plan criteria so the high value is 10 instead of 5, this is not permitted because Customer A, who has eight open service requests is already associated to the plan and would not satisfy the new plan criteria.

This update is permitted in the following scenarios:

- The plan is not associated to any customers.
- The new plan criteria does not violate any of the existing customer plan associations.

The Relationship Plan is setup and the customer is associated to the plan, but the plan does not execute.

Relationship plans are currently integrated with the Contact Center and Service Request modules. No other form can execute plans. If the plan is failing to execute from these two modules, check the following:

Under the Service responsibility, navigate to Setup, then Relationship Plans, and select Enable Relationship Plans and verify if the following entries exist and that the Custom1 check box is selected:

FunctionApplication

CSCCCCRC Customer Care

CSXSRISR Oracle Service

How do I set up Relationship Plans to display alert?s

In this example, we are creating a new message called RV30 and specifying the message text that needs to display an alert.

1. Using the Application Developer responsibility, navigate to Messages.
2. Define an action called RV30 with the following attributes:
   - Action Type = Action Based
   - Correlation = CUSTOMER_RV30

- Select the Enabled and Allow Synchronous Outcomes check boxes.
- Name = CUSTOMER NAME
- Element = CUST_NAME
- Under the Service responsibility, navigate to Setup, Relationship Plans, Events, Define Actions

3. Define a Process Definition (Outcome) called RV30 with the following attributes using this navigation path:

   Under the Service responsibility, navigate to: Setup, then Relationship Plans, then Events, and select Define Process Definition

   - Purpose = "OUTCOME"
   - Type = "ALERT"
   - Name = "CUST_NAME"

     The process definition name must be the same as the message name).

4. Define a relationship plan called RV30. The plan header criteria is 'Open Service Request > 10'. Navigation path: Setup, then Relationship Plans, and select Define Relationship Plans

5. In the Plan Details tab, create a new condition called RV30 using the action called RV30 and outcome RV30.

6. Click Parameters. In the Parameters window, right click and select 'Populate selected rows in parameters'. Invoke the list of values to populate the value for the Action Attribute field.

7. Attach the plan to the customer. In the Relationship Plans Search window, search for the customer to which the plan is to be attached.

8. Click **OK** to invoke the Plans Summary window.

9. Click **Add/Remove** to invokes the Add/Remove Plans window. This window displays all the plans the customer can be associated to. Select RV30 to add the plan called RV30 to the customer.

10. Open the Contact Center window and query the Customer. The relationship plan's alert message displays.

C

Relationship Plans' Predefined Data

This appendix covers the following topics:

- About the Predefined Expiring Contracts Relationship Plan

About the Predefined Expiring Contracts Relationship Plan

The Expiring Contracts relationship plan is designed to display an alert when an agent views a record of a customer who has one or more contracts that expire in the next 30 days.

> **Note: Do not modify seed data.** Predefined data is provided for you to use as delivered. If you want to make modifications, please make a copy and modify the copy.

This appendix describes the following:

- Relationship Plan Header
- Condition Header
- Condition Type
- Outcome
- Parameter
- Outcome Header
- Outcome Argument
- Message Definition
- Profile Definition

- Action Header
- Action Attributes

Relationship Plan Header

- Plan Name - Expiring Contracts
- Plan Type - Template
- Description - Plans that display an alert when querying a customer who has one or more contracts that expire in the next 30 days
- Profile Check - Expiring Contracts
- Operator - >
- Low Value - 0

Condition Header

- Condition Name - Customer Care - Condition for Expired Contracts.
- Description - Predefined condition for Relationship Plans.

Condition Type

- Action - Customer Care - Generic Action

Outcome

- CSC_EXPIRING_CONTRACTS

Parameter

- Parameter - CUST_PARTY_NAME
- Description - Name of the customer who has one or more contracts that expire in the next 30 days.
- Data Type - CHAR
- Action Attribute - CUST_PARTY_NAME

Outcome Header (Process Definition)

- Name - CSC_EXPIRING_CONTRACTS
- Application - Oracle Customer Care
- Description - Outcome that is fired when a customer has one or more contracts that

expire within the next 30 days. An alert message warns the agent about this.

- Purpose - Outcome
- Type - Alert
- Comments - Outcome for a relationship plan that fires when a customer has one or more contracts that expire in the next 30 days.

Outcome Argument

- Name - CUST_PARTY_NAME
- Data Type - Char
- Description - Name of the customer who has one or more contracts that expire in the next 30 days.

Message Definition

Message Name - CSC_EXPIRING_CONTRACTS

Message Tokens - CUST_PARTY_NAME

Message Description - Message used as an outcome in a Relationship Plan that fires when a customer has one or more contracts that expire in the next 30 days.

Message Text - Customer &CUST_PARTY_NAME has one or more contracts that expire in the next 30 days.

Profile Definition

Block:

- Name - Expiring Contracts
- Code - EXPIRINGCONTRACTS
- Description - Number of contracts that expire in the next 30 days.
- Application - Oracle Customer Care
- Select - count(*)
- From - OKS_ENT_HEADERS_V A
- Where - (a.party_id =:party_id and:cust_account_id is null) and a.end_date_active <= sysdate + 30

Check:

- Name - Expiring Contracts

- Code - EXPIRINGCONTRACTS
- Description - Number of contracts that expire in the next 30 days.
- Application - Oracle Customer Care
- Type - Variable
- Variable - Expiring Contracts

Action Header

Action Name - Customer Care - Generic Action

Action Type - Action Based

Description - Customer Care generic action that has all the attributes from the contact center header region as well as some from SR, that can be used as additional condition or as arguments to an outcome.

Correlation - CUSTOMER_CARE_ACTION

Application - Oracle Customer Care

Enable - Yes

Counter Action - No

Allow Synchronous Outcomes - Yes

Action Attributes

What follows is a list of the Action Attribute Name, Element Name, Description and Data Type for the attributes provided with the predefined Action named Customer Care - Generic Action:

- Customer Party Id, CUST_PARTY_ID, Customer Party Id, NUMBER
- Customer Party Number, CUST_PARTY_NUMBER, Customer Party Number, CHAR
- Customer Name, CUST_PARTY_NAME, Customer Party Name, CHAR
- Customer Type, CUST_PARTY_TYPE, Customer Party Type, CHAR
- Customer Status, CUST_PARTY_STATUS, Customer Party Status, CHAR
- Customer Account Id, CUST_ACCOUNT_ID, Customer account Id, NUMBER
- Contact Party Id, CONT_PARTY_ID, Contact Party Id, NUMBER
- Contact Party Number, CONT_PARTY_NUMBER, Contact Party Number, CHAR

- Contact First Name, CONT_FIRST_NAME, Contact First Name, CHAR
- Contact Last Name, CONT_LAST_NAME, Contact Last Name, CHAR
- Area Code, AREA_CODE, Area Code, CHAR
- Phone Number, PHONE_NUMBER, Phone Number, CHAR
- E-mail Address, EMAIL, E-mail Address, CHAR
- Address, ADDRESS, Address, CHAR
- City, CITY, City, CHAR
- State, STATE, State, CHAR
- Postal Code, POSTAL_CODE, Postal Code, CHAR
- Province, PROVINCE, Province, CHAR
- Country, COUNTRY, Country, CHAR
- Caller Type, CALLER_PARTY_TYPE, Caller Type, CHAR
- Caller Status, CALLER_PARTY_STATUS, Caller Status, CHAR
- Country Code, COUNTRY_CODE, Country Code, CHAR
- Contact Relation, CONTACT_RELATION, Contact Relation, CHAR
- Critical Overidden Flag, CRIT_OVERRIDE_FLAG, Critical Overidden Flag, CHAR

D

Service Security Predefined Data

This appendix covers the following topics:

- About This Appendix
- Predefined Functions
- Contact Center Functions
- Service Request Functions
- Standard Service Security Predefined Data
- Objects
- Object Functions
- Permission Sets
- Permissions
- Object Instance Sets for Restricted Access
- Object Instance Sets for Unrestricted Access
- Grants

About This Appendix

This appendix lists predefined data for Oracle TeleService. You can enable or disable elements of the Oracle TeleService application including tabs, buttons, menus, and regions by mapping the functions listed in this appendix to responsibilities. You can use the predefined data security information as a guide to creating custom security.

> **Note: Do not modify the predefined data.** This data is provided for you to use as delivered. If you want to make modifications, please make a copy and modify the copy.

Predefined Functions

This group of topics lists the functions you can map to responsibilities using procedures described in *Oracle E-Business Suite Setup Guide*. It lists functions for:

- Contact Center, page D-2
- Service Request Functions, page D-8

Contact Center Functions

The following table lists the Contact Center functions you can map to responsibilities:

Function	Description	Affected Tab or Window
CSCFAAB	Provides access to the Account Interactions button on the Interactions tab.	Contact Center Interactions tab
CSCSFACT	Provides access to the Accounts tab.	Contact Center Accounts tab
CSCSFADB	Provides access to the Details button on the Accounts tab. This button launches the Customer Account Details window.	Contact Center Accounts tab
CSCSFADR	Provides access to the Addresses tab.	Contact Center Addresses tab
CSCSFAIB	Provides access to the All Interactions button in the Interactions tab.	Contact Center Interactions tab
CSCSFAMB	Provides access to the Assignment Manager button next to the Owner and Assignee fields of the Tasks tab.	Contact Center Tasks tab
CSCSFANB	Provides access to the Add Notes button on the Tasks tab.	Contact Center Tasks tab

Function	Description	Affected Tab or Window
CSCSFAPB	Provides access to the Adjustment Processing button.	Contact Center Invoices tab
CSCSFATB	Provides access to the Details button on the Tasks tab.	Contact Center Tasks tab
CSCSFCAD	Provides the ability to creates and update addresses on the Addresses tab.	Contact Center Addresses tab
CSCSFCAT	Provides the ability to create accounts on the Accounts tab.	Contact Center Accounts tab
CSCSFCCC	Provides the ability to create a customer in Create Contact window.	Create Contact window
CSCSFCCP	Provides the ability to create and update contact points in the Contact Points tab.	Contact Center Contact Points tab
CSCSFCIB	Provides access to the Call Information icon in the toolbar and the corresponding menu selection.	Toolbar
CSCSFCNO	Provides the ability to create and update Notes on the Notes tab.	Contact Center Notes tab
CSCSFCOL	Provides access to the Collateral tab.	Contact Center Collateral Tab
CSCSFCPT	Provides access to the Contact Points tab.	Contact Center Contact Points tab
CSCSFCRB	Provides access to the Contact Restrictions button on the Party Information tab.	Contact Center Party Information tab

Function	Description	Affected Tab or Window
CSCSFCRD	Provides access to the Credit tab of the Customer Account Details window.	Contact Center Accounts tab Account Details Window
CSCSFCRE	Provides the ability to create and update relationships on the Relationships tab.	Contact Center Relationships tab
CSCSFCSN	Provides access to the Customer Standard button on the Accounts Tab. This button launches the Customers - Standard window.	Contact Center Accounts tab
CSCSFCTK	Provides the ability to create a task on the Tasks tab.	Contact Center Tasks tab
CSCSFCWU	Provides access to the Call Wrap Up icon in the toolbar and the corresponding menu selection.	Toolbar
CSCSFDBU	Provides access to the Details button on the Party Information tab.	Contact Center Party Information tab
CSCSFDSB	Provides access to the Dashboard tab*.	Contact Center Dashboard tab
CSCSFECO	Provides access to the Edit Contact button.	Contact Center header
CSCSFECT	Provides access to the Edit Customer button.	Contact Center header
CSCSFECW	Provides access to the Open Email Compose Window icon in the toolbar, the Contact Center header, and the Contact Points tab. This also controls access to the corresponding menu selection.	Contact Center header and tabs

Function	Description	Affected Tab or Window
CSCSFIAB	Provides access to the Identifying Address button on the Addresses tab. This button is used to create or change the customer's identifying address.	Contact Center Addresses tab
CSCSFIB	Provides access to the Install Base tab.	Contact Center Install Base tab
CSCSFINT	Provides access to the Interactions tab.	Contact Center Interactions tab
CSCSFINV	Provides access to the Invoices tab.	Contact Center Invoices tab
CSCSFLWF	Provides access to the Launch Workflow button on the Tasks tab.	Contact Center Tasks tab
CSCSFMBU	Provides access to the More button on the Tasks tab.	Contact Center Tasks tab
CSCSFNCO	Provides access to the Create Contact button.	Contact Center header
CSCSFNCT	Provides access to the Create Customer button.	Contact Center header
CSCSFOKS	Provides access to the Contracts tab.	Contact Center Contracts tab
CSCSFORD	Provides access to the Orders tab.	Contact Center Orders tab
CSCSFPBU	Provides access to the Initiate Call button in the Contact Center header and Contact Points tab. This button is located next to the Phone field.	Contact Center header

Function	Description	Affected Tab or Window
CSCSFPDB	Provides access to the Payment Details button.	Contact Center Invoices tab
CSCSFPPB	Provides access to the Payment Processing button.	Contact Center Invoices tab
CSCSFPTY	Provides access to the Party Information tab.	Contact Center Party Information tab
CSCSFQMB	Provides access to the Quick Menu icon in the toolbar and the corresponding menu selection.	Toolbar
CSCSFRBU	Provides access to the Refresh button on the Dashboard tab.	Contact Center Dashboard tab
CSCSFREL	Provides access to the Relationships tab	Contact Center Relationships tab
CSCSFROL	Provides access to the Roles tab of the Customer Account Details window and the ability to create and update roles.	Contact Center Accounts tab Account Details Window
CSCSFRTB	Provides access to the Relationships tab of the Customer Account Details window and the ability to create new relationships.	Contact Center Accounts tab Account Details Window
CSCSFSCB	Provides access to the Script icon in the toolbar and the corresponding menu selection.	Toolbar
CSCSFSCP	Provides access to the Site Contact Points button on the Addresses tab. This button makes it possible to enter addresses for customer sites.	Contact Center Addresses tab

Function	Description	Affected Tab or Window
CSCSFSIT	Provides access to the Sites tab of the Customer Account Details window and the ability to create and update sites.	Contact Center Accounts tab Account Details Window
CSCSFSPB	Provides access to the Soft Phone icon in the toolbar and the corresponding menu selection.	Toolbar
CSCSFSR	Provides access to the Service Request tab.	Contact Center Service Request tab
CSCSFSUS	Provides access to the Suspensions tab of the Customer Account Details window.	Contact Center Accounts tab Account Details Window
CSCSFTDB	Provides access to the Transaction Details button.	Contact Center Invoices tab
CSCSFTSK	Provides access to the Tasks tab.	Contact Center Tasks tab
CSCSFUAT	Provides the ability to update account information in the Accounts tab.	Contact Center Accounts tab
CSCSFUPI	Provides the ability to update customer information on the Party Information tab.	Contact Center Party Information tab
CSCSFUTB	Provides access to the Use Template button on the Tasks tab.	Contact Center Tasks tab
CSCSFUTK	Provides the ability to update a task on the Tasks tab.	Contact Center Tasks tab

Function	Description	Affected Tab or Window
CSCSFUWQ	Provides access to the Universal Work Queue icon in the toolbar and the corresponding menu selection.	Toolbar
CSCSFWKB	Provides access to the Notes tab.	Contact Center Notes tab
CSCSKBIC	Provides access to the Knowledge Base icon in the toolbar and the corresponding menu selection.	Toolbar
CSCSNORB	Provides access to the New button on the Orders tab of the Contact Center.	Contact Center Orders tab
CSCSODEB	Provides access to the Details button on the Orders tab.	Contact Center Orders tab

Service Request Functions

The following table lists service request related functions:

Function	Description	Affected Tab or Window
CS_HA_ADD_NOTES	Provides the ability to create notes.	Workbench tab
CS_HA_AXS_ABORT_SRWF_SM	Provides access to the Abort Service Request Workflow Special Menu item	Menu item
CS_HA_AXS_ACCESS_HOURS_BTN	Provides access to the Access Hours button.	Tasks tab of the Service Request window
CS_HA_AXS_AM_BTNS	Provides access to the Assignment Manager UI.	Service Request header

Function	Description	Affected Tab or Window
CS_HA_AXS_ATTACHMENT_UI	Provides access to attachments.	Service Request window
CS_HA_AXS_CONTACTS_TAB	Provides access to the Contacts/Addresses tab.	Contacts/Addresses tab
CS_HA_AXS_COPY_SR_SM	Provides access to the Copy Service Request item on the Special Menu.	Menu item
CS_HA_AXS_COUNTER_SM	Provides access to the Counters item on the Special Menu.	Menu item
CS_HA_AXS_CUSTOMER_BTN	Provides access to the Customer Update UI.	Service Request window
CS_HA_AXS_CUSTOMER_PROFILE_BTN	Provides access to the Customer Profile.	Service Request window
CS_HA_AXS_FIND_ICON	Provides access to the Find icon.	Service Request header
CS_HA_AXS_FIND_PRD_BTN	Provides access to the Find Instance button.	Service Request header
CS_HA_AXS_FOLDER_BTN	Provides access to the Folder button.	Service Request window
CS_HA_AXS_FULFILMENT_SM	Provides access to the Fulfillment Special menu item.	Menu item
CS_HA_AXS_INTERACTION_TAB	Provides access to the Interactions Tab.	Interactions tab
CS_HA_AXS_KB_UI	Provides access to the Search Knowledge button.	Workbench tab
CS_HA_AXS_LAUNCH_SRWF_SM	Provides access to the Launch Service Request Workflow Special menu item.	Menu item

Function	Description	Affected Tab or Window
CS_HA_AXS_LAUNCH_WF_BTN	Provides access to the Launch Workflow button.	Task tab
CS_HA_AXS_LOG_TAB	Provides access to the Log tab.	Service Request window
CS_HA_AXS_NOTE_DETAIL_BTN	Provides access to the Note Detail button.	Workbench tab
CS_HA_AXS_NOTES_SM	Provides access to the Notes special menu item.	Menu item
CS_HA_AXS_OUTBOUND_EMAIL_SM	Provides access to the Outbound Email Special menu item.	Menu item
CS_HA_AXS_OWC_SM	Provides access to the Web Conferencing special menu item.	Menu item
CS_HA_AXS_PARTS_BTN	Provides access to the Parts button.	Tasks tab of the Service Request window
CS_HA_AXS_PRD_CONFIG_BTN	Provides access to the Instance Configuration button on the Subject tab.	Subject tab
CS_HA_AXS_PRD_COV_TAB	Provides access to the Subject tab.	Subject tab
CS_HA_AXS_PRINT_REQUEST_SM	Provides access to the Print Request special menu item.	Menu item
CS_HA_AXS_PROFIT_MARGIN_SM	Provides access to the Service Request Profit Report Audit special menu item.	Menu item
CS_HA_AXS_QUICKMENU_SM	Provides access to the Quick Menu special menu item.	Menu item
CS_HA_AXS_REL_DOCS_TAB	Provides access to the Related Documents tab.	Related Objects tab

Function	Description	Affected Tab or Window
CS_HA_AXS_SCRIPTING_SM	Provides access to the Scripting special menu item.	Menu item
CS_HA_AXS_SEND_MESSAGE_SM	Provides access to the Send Message special menu item.	Menu item
CS_HA_AXS_SKILLS_BTN	Provides access to the Skills button.	Tasks tab of the Service Request window
CS_HA_AXS_SR_AUDIT_SM	Provides access to the Audit Report special menu item.	Menu item
CS_HA_AXS_SR_ESCALATE_SM	Provides access to the Service Request Escalation special menu item.	Menu item
CS_HA_AXS_SRV_HIST_TAB	Provides access to the Service History tab.	Service History tab
CS_HA_AXS_TASK_DETAIL_BTN	Provides access to the Task Details UI.	Task tab
CS_HA_AXS_TASK_ESCALATE_SM	Provides access to the Task Escalation special menu item.	Menu item
CS_HA_AXS_TASK_TAB	Provides access to the Tasks tab.	Task tab
CS_HA_AXS_TRANSALATION	Provides access to Translation.	Service Request window
CS_HA_AXS_USE_TEMPLATE_BTN	Provides access to the Use Template button.	Tasks tab of the Service Request window
CS_HA_AXS_UWQ_BTNS	Provides access to the UWQ buttons (Call Info, Call Wrap Up, End Call, and Agent on Break Buttons.)	Universal Work Queue window
CS_HA_AXS_VIEW_LOG_BTN	Provides access to the Log and Notes button.	Workbench tab

Function	Description	Affected Tab or Window
CS_HA_AXS_VIEW_MESSAGE_SM	Provides access to the View Message special menu item.	Menu item
CS_HA_AXS_WEB_ACT_SM	Provides access to the Web Availability special menu item.	Menu item
CS_HA_AXS_WORKBENCH_TAB	Provides access to the Workbench tab.	Workbench tab
CS_HA_INST_CHRG	Provides the ability to create charges.	Charges tab of the Service Request window
CS_HA_INST_CONTACTS	Provides the ability to create contact and contact point.	Create Contact window
CS_HA_INST_INTERACTION_ACT	Provides the ability to create interactions and activities.	Service Request window
CS_HA_INST_REL_DOCS	Provides the ability to create related document.	Related Objects tab
CS_HA_INST_SERVICE_REQUEST	Provides the ability to create a service request.	Service Request Creation
CS_HA_INST_TASK	Provides the ability to create tasks.	Task tab
CS_HA_UPDT_CHRG	Provides the ability to update charges.	Charges tab on Service Request window
CS_HA_UPDT_CONTACTS	Provides the ability to update contact and contact point.	Service Request window
CS_HA_UPDT_NOTES	Provides the ability to update notes.	Workbench tab
CS_HA_UPDT_REL_DOCS	Provides the ability to update related document and access the Delete Link button.	Related Objects tab

Function	Description	Affected Tab or Window
CS_HA_UPDT_SERVICE_REQUEST	Provides the ability to update service requests.	Service Request Update
CS_HA_UPDT_TASK	Provides the ability to update tasks.	Service Request window
CS_MASS_SR_UPDATE	Provides the ability to search and update mass service requests.	Mass Service Request Update window
CS_SR_OK_INTEGRATION_FN	Provides the ability to search using InQuira.	Workbench tab

Standard Service Security Predefined Data

This section lists the seed data for the standard service security that comes with your application. You can use it as a guide for creating your own custom security.

Objects

The following table lists the objects used by standard service security:

Object Name	Description
CS_SERVICE_REQUEST	Service Request
CS_SR_TYPE	Service Request Type
JTF_TASK_RESOURCE	Resources

Object Functions

The following table lists the predefined object functions, also known as Form Functions.

Object Function Name	Related Object	Description
CS_JTF_RESOURCE_SELECT_SEC	JTF_TASK_RESOURCE	Select Service Request Type
CS_SR_ACCESS_RESP_SEC	CS_SERVICE_REQUEST	Service request security for Oracle Telephony Manager
CS_SR_TYPE_SELECT_SEC	CS_SR_TYPE	Select Service Request Types
CS_SR_CREATE	CS_SERVICE_REQUEST	Create access to a service request
CS_SR_UPDATE	CS_SERVICE_REQUEST	Update access to a service request
CS_SR_VIEW	CS_SERVICE_REQUEST	Read access to a service request
CS_SR_DELETE	CS_SERVICE_REQUEST	Delete access to a service request

Permission Sets

The following table lists the predefined object roles. These are the service related menus, also known as Object Roles or FND Menus.

Permission Set	Description
CS_SR_FULL_ACCESS	Provides full access to Service Request data
CS_SR_TYPE_SELECT	Select Service Request Types
CS_RESOURCE_ASSIGN	Assign service request resources
CS_SR_ACCESS_RESP	Security request security for Oracle Telephony Manager

Permissions

The following table lists the predefined object role functions, also known as Object Role Functions or FND Menu Functions.

Permission	Object Function (Function_name in FND_FORM_FUNCTIONS)	Purpose
CS_SR_FULL_ACCESS	• CS_SR_CREATE (Provides create access to service request data) • CS_SR_UPDATE (Provides update access to service request data) • CS_SR_VIEW (Provides read access to service request data) • CS_SR_DELETE (Provides delete access to service request data)	Provides full access to service request data
CS_SR_TYPE_SELECT	CS_SR_TYPE_SELECT_SEC	To Secure CS_SR_TYPE in base queries in service security
CS_RESOURCE_ASSIGN	CS_JTF_RESOURCE_SELECT_SEC	For validating SR owner as resource.
CS_SR_ACCESS_RESP	CS_SR_ACCESS_RESP_SEC	Validates Oracle Telephony Manager access to service requests.

Object Instance Sets for Restricted Access

The following table lists the predefined object instance sets used by the application when normal security is turned on.

Object Instance Set Name	Predicate	Description
CS_SR_SRTYPE_SEC	EXISTS (SELECT '1' FROM cs_sr_type_mapping csmap WHERE csmap.incident_type_id = &TABLE_ALIAS.incident_type_id AND csmap.responsibility_id = sys_context('FND', 'RESP_ID') AND csmap.application_id = sys_context('FND', 'RESP_APPL_ID') AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) and trunc(nvl(csmap.end_date,sysdate)))	Restricts service request access by Service Request Type
CS_SRTYPE_SEC	AND EXISTS(SELECT '1'FROM cs_sr_type_mapping csmapWHERE csmap.incident_type_id = cs_incident_types_b_sec.incident_type_id AND csmap.responsibility_id = sys_context('CS_SR_SECURITY', 'RESP_ID')AND csmap.application_id = sys_context('CS_SR_SECURITY', 'APPL_ID') AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) AND trunc(nvl(csmap.end_date,sysdate)))	Restricts availability of Service Request Types

Object Instance Set Name	Predicate	Description
CS_RESOURCE_SEC	EXISTS (SELECT '1' from FND_USER_RESP_GROUPS ur, cs_sr_type_mapping csmap WHERE cs_jtf_rs_resource_extns_sec.user_id = ur.user_id AND ur.responsibility_id = csmap.responsibility_id AND ur.responsibility_application_id = csmap.application_id AND csmap.business_usage = 'AGENT' AND csmap.incident_type_id = sys_context('CS_SR_SECURITY', 'SRTYPE_ID') AND trunc(sysdate) between trunc(nvl(ur.start_date,sysdate)) AND trunc(nvl(ur.end_date,sysdate)) AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) AND trunc(nvl(csmap.end_date,sysdate))) OR (cs_jtf_rs_resource_extns_sec.user_id is NULL AND cs_jtf_rs_resource_extns_sec.category <> 'EMPLOYEE'))	Restricts assignment of resources to service requests

Object Instance Set Name	Predicate	Description
CS_SR_ACCESS_RESP_SEC	AND EXISTS (SELECT '1' from cs_sr_type_mapping csmap WHERE csmap.incident_type_id = cs_incidents_b_sec.incident_type_id AND csmap.responsibility_id = sys_context('CS_SR_SECURITY', 'RESP_ID')AND csmap.application_id = sys_context('CS_SR_SECURITY', 'APPL_ID') AND trunc(sysdate) between trunc(nvl(csmap.start_date, sysdate)) AND trunc(nvl(csmap.end_date,sysdate)))	Restricts access to service requests by Service Request Type and responsibility

Object Instance Sets for Unrestricted Access

The following table lists the predefined object instance sets used by the application when normal security is turned off and permits unrestricted access.

Object Instance Set Name	Predicate	Description
CS_RESOURCE_NO_SEC	"1=1"	Permits unrestricted assignment of resources to service requests
CS_SR_ACCESS_RESP_NO_SEC	"1=1"	Permits unrestricted access to Service Request Types by responsibility
CS_SR_SRTYPE_NO_SEC	"1=1"	Permits unrestricted service request access by Service Request Type

Object Instance Set Name	Predicate	Description
CS_SRTYPE_NO_SEC	"1=1"	Permits unrestricted availability of Service Request Types

Grants

The following table lists all predefined grants. All predefined grants are set with the grantee of GLOBAL.

Description	Object Type	Object Role	Instance Set
Restricts access by Service Request Type	CS_SERVICE_REQUEST	CS_SR_FULL_ACCESS	CS_SR_SRTYPE_SEC
Permits access to all Service Request Types when security is turned off.	CS_SERVICE_REQUEST	CS_SR_FULL_ACCESS	CS_SR_SRTYPE_NO_SEC
Restricts service request access by Service Request Type and specific responsibility	CS_SERVICE_REQUEST	CS_SR_ ACCESS_RESP	CS_SR_ACCESS_RESP_SEC
Permits access to all Service Request Types by responsibility when security is turned off.	CS_SERVICE_REQUEST	CS_SR_ ACCESS_RESP	CS_SR_ACCESS_RESP_NO_SEC
Secures the Service Request Type list of values (LOV)	CS_SR_TYPE	CS_SR_TYPE_SELECT	CS_ SRTYPE_SEC
Permits access to all Service Request Types in the LOV when security is turned off	CS_SR_TYPE	CS_SR_TYPE_SELECT	CS_SRTYPE_NO_SEC

Description	Object Type	Object Role	Instance Set
Restricts resources that can be assigned to service requests and service request tasks by Service Request Type.	JTF_TASK_RESOURCE	CS_RESOURCE_ASSIGN	CS_RESOURCE_SEC
Permits assignment of all resources to service requests and service request tasks when security is turned off	JTF_TASK_RESOURCE	CS_RESOURCE_ASSIGN	CS_RESOURCE_NO_SEC

E

Service Territory Qualifiers

This appendix covers the following topics:

- Service Qualifiers

Service Qualifiers

The following table displays the service qualifiers that are used in automatic assignment of work. The assignment process checks to see if the service request attributes can be matched against any of the service territories set up with Oracle Territory Manager.

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
1	City	Account	Is Equal To	LOV	All cities from table 'HZ Geographies' where the geography type = 'CITY'. In addition all lookup codes defined for lookup type 'CS_CITY' are also listed.	City of the Incident Address associated with the service request. This value is derived from table 'HZ_LOCATION'.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
2	Country	Account	Is Equal To	LOV	All countries from table 'FND_TERRITORIES_VL'.	Country of the Incident Address associated with the service request. This value is derived from table 'FND_TERRITORIES_VL'.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
3	County	Account	Is Equal To	LOV	All counties from table 'HZ Geographies' where the geography type = 'COUNTY'. In addition all lookup codes defined for lookup type 'CS_COUNTY' are also listed.	County of the Incident Address associated with the service request. This value is derived from table 'HZ_LOCATION'.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
4	Postal Code	Account	Is Equal To Between Contains	Free Form	NA	Postal Code of the Incident Address associated with the service request. This value is derived from table 'HZ_LOCATION'.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
5	Province	Account	Is Equal To	LOV	All provinces from table 'HZ Geographies' where the geography type = 'PROVINCE'. In addition all lookup codes defined for lookup type 'CS_PROVINCE' are also listed.	Province of the Incident Address associated with the service request. This value is derived from table 'HZ_LOCATION'.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
6	State	Account	Is Equal To	LOV	All states from table 'HZ Geographies' where the geography type = 'STATE'. In addition all lookup codes defined for lookup type 'CS_STATE' are also listed.	State of the Incident Address associated with the service request. This value is derived from table 'HZ_LOCATION'.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
7	Area Code	Account	Is Equal To Between Contains	Free Form	NA	Area Code of the phone number associated with the service request customer.	Yes	Yes
8	Customer Name	Account	Is Equal To	LOV	All active parties from table 'HZ_PARTIES'.	Name of the Customer associated with the service request. This is the Customer who is reporting the issue.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
9	Customer Name Range	Account	Is Equal To Between Contains	Free Form	NA	Name of the Customer associated with the service request. Territory Manager checks to see if the passed in Customer Name is within the range setup in the territory rule.	NA	NA
10	Customer Site	Account	Is Equal To	LOV	All active party sites from TCA.	Site number associated with the service request.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
11	Day of Week	Account	Is Equal To	LOV	All active lookups from table 'FND_LOOKUPS' with lookup type = 'JTY_SR_WEEK_DAY'.	The name of the weekday (Monday – Sunday) when the service request is seeking assignment. It can be the day when the service request is created or the day when it is updated. For service request tasks, the day of the week is the day	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
						of the task's planned		

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
12	Number of Employees	Account	Is Equal To Between	Free Form	NA	Number of employees tied to the Customer associated with the Service Request. Column 'EMPLOYEES_TOTAL' in table 'HZ_PARTIES' stores the number of employees associated with each party. This value is retrieved for the Customer associated with	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
						the service request		
13	Site Number	Account	Is Equal To	LOV	All active party sites from TCA	Site number associated with the service request.	No	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
14	Time of Day (hh24:mi)	Account	Is Equal To Between Contains	Free Form		The time of the day when the Service Request is seeking assignment. It is the hour and minutes component of the time when the Service Request is created or updated. For service request tasks, the time of the day is the time of the task's planned start	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
						date.		
15	Product	Task	Is Equal To Between	LOV	At this point the LOV does not return anything.	Nothing is passed from Service to AM. Candidate for obsolescence.	NA	NA
16	Task Load	Task	Is Equal To Between Contains	Free Form	Reserved for future use	Reserved for future use	NA	NA
17	Task Priority	Task	Is Equal To	LOV	All priorities from table 'JTF_TASK_PRIORITIES_VL'.	Priority associated with the Service Request Task.	Yes	Yes
18	Task Status	Task	Is Equal To	LOV	All statues from table 'JTF_TASK_STATUES_VL'.	Status associated with the Service Request Task.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
19	Task Type	Task	Is Equal To	LOV	All task types from table 'JTF_TASK_TYPES_VL'.	Type associated with the Service Request Task.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
20	Component/ Subcomponent	Service Request	Is Equal To	Two values from LOV	Component LOV All active service items from the item master table 'MTL_SYSTEM_ITEMS_VL' which belong to the organization that is returned by the function 'CS_STD.get_item_valdn_orgzn_id' Subcomponent LOV All active BOM items derived from the followin	The Component and Subcomponent that is associated with the Service Request. Note: These fields can be found in the 'Subject' tab of the Service Request Form.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
					g tab			
21	Contact Preference	Service Request	Is Equal To	LOV	All active lookups from table 'AR_LOOKUPS' where lookup type = 'COMMUNICATION_TYPE'.	Contact preference of the Contact associated with the service request.	NA	NA
22	Customer Site	Service Request	Is Equal To	LOV	All active party sites from TCA.	Reserved for future use	NA	NA
23	Group Owner	Service Request	Is Equal To	LOV	All active groups from table 'JTF_RS_GROUPS_VL'.	Group owner associated with the service request.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
24	Inventory Item	Service Request	Is Equal To	LOV	Same as Qualifier 28.	Inventory item associated with the service request.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
25	Platform	Service Request	Is Equal To	LOV	All platforms from table 'MTL_SYSTEM_ITEMS' that belong to the organization that is set in profile 'Service: Inventory Validation Organization'. Also these platforms need to be under the platform category set that is set in profile 'Service: Default	Supported Platform of the Product associated with the service request. The Platform Item on the service request.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
					Platf			
26	Primary Platform	Service Request	Is Equal To	LOV	Reserved for future use	Reserved for future use	NA	NA
27	Problem Code	Service Request	Is Equal To	LOV	All active lookups from table 'CS_LOOKUPS' where lookup type = 'REQUEST_PROBLEM_CODE'.	Problem Code associated with the service request.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
28	Product	Service Request	Is Equal To	LOV	All active service items from the item master table 'MTL_SYSTEM_ITEMS_VL' which belong to the organization that is set in profile 'Service: Inventory Validation Organization'.	Inventory item associated with the service request.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
29	Product or Component or Subcomponent	Service Request	Is Equal To	Three LOVs	**Product LOV** All active service items from the item master table 'MTL_SYSTEM_ITEMS_VL', which belong to the organization that is set in profile 'Service: Inventory Validation Organization'. **Component LOV** All active BOM	Product is the Item associated with the service request. Component and subcomponent are child items of the selected product associated with the service request.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
					items derived from the following tables: tables: 'MTL_SYSTEM_ITEMS', 'BOM_BILL_OF_MATERIALS', and 'BOM_INVENTORY_COMPONENTS'. All these items need to be setup in the organization that is returned by the function 'CS_STD.get_item_valdn_orgzn_id'.			

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
					These items need to be a component of the selected product. **Subcomponent LOV** All active BOM items derived from the following tables: 'MTL_SYSTEM_ITEMS', 'BOM_BILL_OF_MATERIALS', and 'BOM_INVENTORY_COMPONENTS'. All			

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
					these items need to be setup in the organization that is returned by the function 'CS_STD.get_item_valdn_orgzn_id'. These items need to be a subcomponent of the selected component.			

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
30	Product Category or Product	Service Request	NA	Two LOVs	**Product Category** All product categories from table 'MTL_CATEGORY_SET_VALID_CATS' that belong to the Category Set that is set in profile 'Service: Default Item Category Set'. **Product** All active items from the item master table 'MTL_S	Product Category is the Inventory Category associated with the service request. Product is the Inventory Item associated with the service request. This product needs to belong to the selected product category.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
					YSTEM_ITEMS_VL' which belong to the organization that is returned by the function 'CS_STD.get_item_valdn_orgzn_id'. Also, the item needs to belong to the selected Product Category.			
31	Product Type	Service Request	Is Equal To Between Contains	Free Form	Candidate for obsolescence.	Candidate for obsolescence.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
32	Request Creation Channel	Service Request	Is Equal To	LOV	All active lookups from table 'CS_LOOKUPS' where lookup type = 'CS_SR_CREATION_CHANNEL'.	Channel through which the service request was created – Phone, Email, Web, etc.	Yes	Yes
33	Request Severity	Service Request	Is Equal To	LOV	All active severities from table 'CS_INCIDENT_SEVERITIES'.	Severity associated with the service request.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
34	Request Status	Service Request	Is Equal To	LOV	All statues from table 'CS_INCIDENT_STATUES' with subtype = 'INC'.	Status associated with the service request.	Yes	Yes
35	Request Type	Service Request	Is Equal To	LOV	All active types from table 'CS_INCIDENT_TYPES'.	Type associated with the service request.	Yes	Yes
36	Request Urgency	Service Request	Is Equal To	LOV	All urgencies from table 'CS_INCIDENT_URGENCIES'.	Urgency associated with the service request.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
37	Service Contract Coverage	Service Request	Is Equal To	LOV	All active contract coverage types from table 'OKS_COV_TYPES'.	Coverage type of the contract associated with the service request.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
38	Service Item	Service Request	Is Equal To	LOV	All active serviceable items from table 'MTL_SYSTEM_ITEMS' which can be associated with a contract. All these items need to be setup in the organization that is returned by the function 'CS_STD.get_item_valdn_orgzn_id'.	Inventory item defined in the contract associated with the service request.	NA	NA

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
39	Service Request Language	Service Request	Is Equal To	LOV	All languages from table 'FND_LANGUAGES_VL'.	Preferred language of the customer associated with the service request.	Yes	No

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
40	Subcomponent	Service Request	Is Equal To	LOV	All active items from the item master table 'MTL_SYSTEM_ITEMS_VL' which belong to the organization that is returned by the function 'CS_STD.get_item_valdn_orgzn_id'	Subcomponent of the Inventory Item associated with the Service Request.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
41	Support Site	Service Request	Is Equal To	LOV	A concatenation of the party name and address derived from the following tables: HZ_PARTIES, HZ_LOCATIONS, and HZ_PARTY_SITES.	The support site where the owner of the service request is located. Each support resource can be linked to a support site in Resource Manager.	NA	NA
42	Support Service	Service Request	Is Equal To	LOV	Reserved for future use	Reserved for future use	NA	NA
43	System	Service Request	Is Equal To Between Contains	Free Form	List of all systems from Install Base.	System attribute associated with the service request.	Yes	Yes

Number	Qualifier Name	Transaction Type	Permitted Operators	LOV or Free Form	LOV Logic in Territory Setup UI	Service Request or Task Attribute passed to Territory Manager	Works in Assignment Manager	Works in Sales
44	System Type	Service Request	Is Equal To Between Contains	Free Form	Reserved for future use	Reserved for future use	NA	NA
45	VIP Customers	Service Request	Is Equal To	LOV	Reserved for future use.	Reserved for future use.	NA	NA

F

User Interfaces in Contact Center and Service Request Module

This appendix covers the following topics:

- About the Service Request Window
- About the Note Details Window
- About the Create Contact Window
- About the Find Service Request and Find Installed Base Windows
- About the Find Service Requests Window
- About the Create Tasks from Template Group Window in Service Request
- About Choosing the Report Format
- About the Log and Notes Window
- About the Person Details Window
- About the Profile Window
- About the Customer Relationship Actions Window
- About The Contact Center
- About the Organization Details Window
- About the Customer Account Details Window
- About the Contact Preferences Window
- About the Identifying Address Window
- About the Party Site Contact Points Window
- About the Process Messages Window
- About the Notify Window
- About the Item Instance Window

- About the Find Item Instance Window
- About the Quick Task Window
- System Profile Options You Can Use to Default Information in Service Requests
- About the Contracts Window
- About the Task Details Window
- About the Create Tasks from Template Group Window in Contact Center
- About the Create Customer Window
- About the Edit Customer Window
- About the Customer Search Window
- About the Edit Contact Window
- About the Find Critically Overridden Customers Window
- About the Override Customer Criticality Window
- About the Nodes for UWQ SR Window
- About the Save Search Window
- About the Service Request Runtime Attribute Capture Window
- About the Maintenance Requirements Window
- About the Potential Duplicate Service Requests Window
- About the Quick Menu Window
- About the Copy Service Request Window
- About the Oracle Scripting Window
- About the Resource Availability Window
- About the Call Information Window
- About the Call Wrap Up Window
- About the Search Installed Base Window
- About the Incident Address Search Window
- About the Send Message Window
- About the View Message Window
- About the Review Kits Window
- About the Review Order Window
- About the Audit History Window
- About the Edit Address Window
- About the Edit Contact Window

- About the Fulfillment Request Window
- About the Service History Window
- About the Drilldown List Window
- About the Resource Availability Window
- About the Find Customer Information Window
- About the Relationship Plans Search Window
- About the Plans Summary Window
- About the Modify Plans Window

About the Service Request Window

Use the Service Request window to manage customer or employee requests for service from the initial contact until the problem is resolved. This window is designed for use by Tier-2 customer support agents.

> **Note:** To enter Additional Service Request Information for a service request, click the Extensible Attributes option in the Tools2 menu of the Service Request window. This option is available only after the service request is saved.
>
> If the status of the service request is Closed, and the Disallow Update check box is selected for the service request status, then the Extensible Attributes page opens in a read-only mode. Please refer to Capturing Additional Service Request Information with Extensible Attributes, page 45-1 for more information on capturing extensible attributes.

Information is available on the following:

- Service Request header, page F-4
- Subject tab, page F-8
- Workbench tab, page F-8
- Contact / Addresses tab, page F-10
- Tasks tab, page F-11
- Interactions tab, page F-13
- Related Objects tab, page F-13
- Service History tab, page F-15

- Charges tab, page F-15
- Work Orders tab, page F-19
- Maintenance Requirements tab, page F-19
- Custom tabs, page F-19

About the Service Request Header

In the window header you can:

- Search for and enter customer, contact, and incident information

  Note: Use the Maximize or Minimize Header button (plus sign at the top right hand corner of the window) to reveal additional header information. To open the Service Request window in a maximized mode, you need to set the Service: SR Form Open Mode profile option to Maximized.

  Use the Dashboard button to view profile checks for the customer, contact, employee, account, and party site. You can drill down to the detailed list of the records and navigate to the details from the dashboard, similar to the Dashboard tab in the Contact Center. The Refresh button on the Dashboard form enables you to partially refresh the key indicators or refresh all the profile checks.

  Note: If you enter the product information before selecting the service request type or severity, the entitlement check is not performed on the instance number, serial number, tag number, and the Search Install Base window. You must then click the Get Contracts button to get the best contract.

- Enter the serial number, instance number, or tag number to display the customer product that is the subject of the service request. The instance number is the Oracle Install Base identifying number.

  Use the Service: Restrict Install Base by Incident Address profile option to display products at a specific site. You can select one of the following values:

  Yes - To display all instances whose current location in the install base matches the incident address.

  No -To display all products that are owned by the selected customer.

- Enter the incident address. You can either select an existing address from the database or enter the address as text by selecting the One Time Address check box. One time addresses are not stored as customer addresses in your database. Use the

Addresses tab in the Contact Center to create permanent addresses.

- Use the Service: One Time Address Format profile option to determine which format to use for creating and updating the one time incident address. You can use either the global format or the free form format. The one time incident address is validated against TCA Geography setup if the value in the Service: Validate One-Time Address Against TCA Geography profile option is Yes. The incident address is displayed in the flexible address format if the value in the Service: One-Time Address Format profile option is Global Format. The style of the flexible address format is based on the country of the address. During the creation of the one time incident address the Country field in the Incident Address group is displayed based on the value specified in the AOL Default Country profile option. You can change the default value by selecting another country from the Country list. Use the AR: Remit HZ Address Flexfields profile option to enter the address information in TCA Address Flexfields page.

- Click the Search Incident Address icon in the Incident Address group to search for and select an incident address from the database. You can search by customer name, site name, address, city, postal code, customer number, site number, state, county, account, addressee, site phone, country and province.

- The service request incident address details appear in the task location unless the task location is manually changed to a different location.

- Select the operating unit for the service request. This field becomes a read-only field in the update mode.

  The default value for the operating unit is displayed based on the settings in the following profile options:

  - If the Service: Restrict Operating Unit by MOAC is set to *Yes* then the operating unit is displayed based on the following profile options:

    - MO: Default Operating Unit – If an operating unit value is not specified for this profile option, the Service Default Operating Unit profile option is considered.

    - Service Default Operating Unit – If an operating unit is not specified then the operating unit is not displayed.

    - The Operating Unit LOV displays operating units that are associated with the user.

  - If the Service: Restrict Operating Unit by MOAC is set to *No*, then the default value for the operating unit is displayed based on the value specified in the Service: Default Operating Unit profile and the Operating Unit LOV displays all operating units.

- A party site and location is created for each one time incident address and is linked to the service request customer party. When the existing one time addresses are migrated to TCA party sites, only fields that are currently supported by TCA are migrated, and fields that are not migrated remain in the service schema.

- Use the Service: Address Filter Options profile option to filter the incident addresses. You can select from the following values:

  Customer Sites Only - To display

  - all active party sites for the selected incident customer, if the customer is selected, or

  - all party sites for the selected customer party and the incident customer is not selected, or

  - all active party sites if neither the incident customer nor the customer party is selected.

  Customer Sites and Locations - To display

  - all active party sites for the selected incident customer and all freestanding locations, if the incident customer is selected, or

  - all active party for the selected customer party and all freestanding locations, if the incident customer is not selected.

  - all active party sites and all freestanding locations if neither the incident customer nor the customer party is selected.

  All – To display

  - all active party sites and freestanding locations. Party type includes person, organization, and relationship.

  Null - To display

  - all active party sites and freestanding locations, if the customer is not selected. Party type includes person, organization, and relationship.

  - all active party sites, if the customer is not selected. Party type includes person and organization.

- Enter the incident customer. The incident customer is displayed based on customer party or the party associated to the selected incident address. If the Service: Address Filter Option profile option is set to Null, the Incident Customer field is disabled. The Incident Customer list displays all parties if the customer is not selected on the Service Request header. When a customer is selected on the Service Request header, the Incident Customer list displays all parties related to the Service Request Customer Party (organization, person, relationship).

  When the incident address is displayed the incident customer is displayed based on

the TCA relationship between the Service Request (SR) Customer Party and the Install Base (IB) Current Location Party. If the Service Request Customer Party and the Install Base Current Location Party are not related then the incident customer and incident address are null.

- Classify the customer problem using the Type field. Choosing the type affects the assignment of this service request to other agents for resolution, and determines who can view and update the service request. A service request type can also trigger the application to populate the service request with tasks designed to solve that type of problem, to specify the contractual response and resolution times, and even to launch Oracle Workflow processes.

- Use the Status field to specify where the service request is in its progress towards resolution. Choosing the correct status is important because some statuses can lock the service request so it cannot be updated, or launch an approval process.

- Use the Severity field to indicate the importance of this service request. The severity determines its priority in automatic work assignments.

- Use the Expenditure Org. and the other Project-related fields to associate a project with the service request. Project-related information displayed is project number, project name, project task number and project task name. The information displayed in the project number and the expenditure organization LOVs are based on the operating unit on the service request

  These fields are hidden out-of-the-box and can be displayed through the folder functionality

- Use the Sales Order Number field to select a sales order number from the LOV to add the charge lines.

- Reassign the service request to another group or an individual using the Group or Owner fields. If you have automatic assignment implemented, you can have the application do the assignment for you simply by leaving these fields blank. Or you make the assignment with the assistance of the Assignment Manager module by clicking the Assign Group or Assign Owner buttons to the right.

  Double click in the owner field to view details about the service request owner such as email ID, mobile number, and work phone.

- Use the Service: Date to Calculate SLA profile option to select the date to calculate the SLA. The available values are as follows:

  Reported Date: This calculates the Respond By date based on the Reported Date and the reaction time and the Resolve By date based on the Reported Date and the resolution time.

  Created On Date: This calculates the Respond By date based on the Created On Date and the reaction time and the Resolve By date based on the Created On Date and

the resolution time.

- You can send an e-mail to the service request primary contact by clicking the Open Email Compose Window to the right of the Email field. If you have Oracle Email Center implemented, the e-mail can automatically populate with service request details. The e-mail you send is recorded in interaction history.

- You can create and update a service request by providing all the mandatory information in the service request header region. You can enter information for the following fields in the header region: Problem Summary Field, Problem Code, Urgency, Error Code, Notes, and Extensible Attributes.

- Identify duplicate service requests. For more information, see Setting Up Duplicate Checking, page 9-1

- Specify the credit card information for billing the customer. The credit card information entered at the SR header level is cascaded down to the charge line level. You can manually change the credit card information at the charge line. If you change the credit card information at the SR header level, these changes are cascaded down to the charge line if the credit card is not changed manually and the bill to account is same as the bill to account on the SR header.

You can set up system profiles that speed up service request creation by defaulting all the required fields except the problem summary. For a list, please see System Profile Options You Can Use to Default Information in Service Requests, page F-33.

About the Subject Tab

Use the Subject tab to:

- View the customer's install base information or add a new product that is not yet registered.

  The Instance Configuration, Instance Detail, and Register Instance buttons launch Oracle Install Base in a separate browser window.

- View and choose service contracts coverage for the customer or item.

  The Get Contracts button searches for applicable contracts. Choosing the Entitled Contracts option restricts the search to those contracts currently in effect.

  View the name of the coverage, the coverage description, and the type of coverage. You can also view the coverage details for a contract by clicking the Details button (glasses icon).

About the Workbench Tab

Use the Workbench tab to:

- Enter the customer problem in the problem summary field.

  The summary is used for knowledge management searches. The problem summary entered when creating a service request is updated in the Subject field of the Service Request Task tab. The subject field is updated only for the first manually created task.

- Classify the problem with optional problem codes.

  Problem codes provide a standard way of classifying the customer problem. The problem codes that are available vary by service request.

- View and enter response and resolution times.

  The application automatically enters the response and resolution times for the service request type you have chosen based on the service contract you have selected in the Subject tab or based on a default service level agreement the administrator entered.

- Search the knowledge base for possible solutions by clicking the Search Knowledge button.

  The results of the search appear in a separate browser window. If a solution proves useful, you can link that solution to the service request. The linked solutions appear in the Solutions region.

  You can also use InQuira Search to search for solutions.To display the InQuira Search page, set the *Knowledge: Search to display for integrating applications* profile option to *InQuira Search*. If there are any solutions attached to the service request, the InQuira solutions page is displayed along with the service request summary.

- Click the eye-glass button to view the details of the linked knowledge management solutions.

- View and enter notes related to the service request

  You can specify who can view a note by setting its Visibility:

  - Private: This note can be viewed only by you.

  - Public: Viewable by all Oracle E-Business Suite application users.

  - Publish: Viewable by all Oracle E-Business Suite application users as well as external customers.

You can use the Note Type field to classify the note.

- View a log of the service request changes in a separate window according to the selected time zone. Some of the details that you can view are service request audit information, notes, interactions (activities), and task audit information including task number, task status, task notes, and the task address. Tasks details are

displayed if you select the All or the Task check boxes in the Log and Notes form. You can also view the same details from the Service Request header and the Service Request tab of the Contact Center

The Print Friendly button displays the notes in a separate window. You can select the agent, server, contact, or the customer time zone format to view the notes.

The Log and Notes button displays notes along with the log of service request changes in a separate window.

About the Contact and Addresses Tab

Use this tab to enter contacts (customer contacts or your organization's employees) for the service request.

The contact you designate as primary is the one that appears in the service request header. By default, you can view only active contacts. Select the Include Inactive check box to view inactive contacts on the service request. You can reactivate contact points that were previously inactivated by deselecting the Inactive check box for the contact point.

Select the Inactive check box to inactivate a contact point. However, a primary contact cannot be inactivated if the contact is the only contact for that service request and the Service: Make Contact Mandatory profile option is set to Yes.

Wwhenever the service request is updatedYour application administrator can have the contacts automatically notified .

You can create new customer contacts or edit contact information, by clicking the Create Edit Contact Button to the right of the tab.

The Bill To and Ship To addresses become the primary addresses for any shipments or billing for this service request. You can enter the credit card details in the Bill To Address region. Specify the following information to enable selection of a credit card to make payments by specifying the following information – credit card number, cardholder, card type, and the card expiration date. Use the folder functionality to enable the credit card fields in the Bill To address region.

The credit card number list displays registered credit cards for the selected account and displays the credit card type, cardholder, and the expiration date based on the selected credit card number. This field is enabled if the Bill-To account value is available. If Bill To Account is cleared, this field is disabled. If Bill-To account is modified, this field is cleared and if the service request is in a read-only state, this field is disabled. The card number is displayed in an encrypted format based on the setup in the Oracle Payments. The system administrator can choose to display the credit card in an encrypted format and the format it uses. For example, if the actual credit card number is 1234123412341234, it can be displayed as xxxxxxxxxxxx1234 on the Card Number list based on the setup in Oracle Payments.

When you select a card number from the list, other details such as cardholder name, card type, and the expiration date are automatically displayed.

Use the Service: Default Bill To and Ship To Address Options profile option to set the Bill To and Ship To addresses. You can select from the following values:

- Default from Customer: This sets the Bill To and Ship To addresses based on the customer's primary address on the Service Request header.

- Default from Installed Base: This sets the Bill To and Ship To addresses based on the respective addresses defined in the item instance of the service request. If the Bill To and Ship To addresses are not defined in the item instance or these addresses do not have a valid relationship with the SR's customer party as defined in TCA, then the Bill To and Ship To addresses are set based on the customer's primary address on the Service Request header.

  To update the existing credit card details or add a new card, click the Create/Update Credit Card button.

About the Tasks Tab

Use this tab to create and manage tasks that must be performed in the resolution of the service request.

You can create tasks manually by using the new record icon or by using a task template (Use Template button) on the Task Tab. For more information, see About the Create Tasks from Template Group Window, page F-21.

If the Restrict Closure check box is enabled, you can select it to prevent the service request from being closed before this task has been completed. Service requests and tasks can be closed independently of each other unless you do so.

The Assignee of the task is the individual who performs the work. The Owner of the task is the person who supervises its completion. They can be the same person. To view details about the task assignee and the task owner such as their email ID, mobile number, and work phone, click the Assignee Details and the Owner Details buttons (the button with the ellipsis) beside the respective fields.

You can filter the task assignee based on the owner of the task if the owner type is a group resource and the assignee type is either an employee resource or a supplier contact.

You can assign the task manually, permit the application to assign the task automatically, or use the Assignment Manager or the Advanced Scheduler application modules by clicking the Assignment Manager button. See your application administrator for the methods and procedures appropriate for your implementation.

You can specify the date for resolution of a task in the service request. Enter the planned, scheduled and actual start and end dates. You can use the Service: Options to Default the Task Planned End Date profile option to calculate the default planned end date for a service request task. You can select any of the following values:

Respond By: To set the planned date the same as the Respond By date on the service request. If the response date is not specified then the planned end date is calculated as

planned start date plus the value specified in the above profile option. If none of the values are specified, then the system date is taken as the default planned end date.

Respond By, if null use (resolve by less planned effort): To set the planned date the same as the Respond By date on the service request. If the response date is not specified in the service request, then the planned end date is calculated as the Resolve By date less the planned effort. If none of the values are specified, then the planned end date is calculated as planned start date plus the value specified in the above profile option.

Resolve By: To set the planned date the same as the Resolve By date on the service request. If the response date is not specified in the service request then the planned end date is calculated as planned start date plus the value specified in the above profile option. If none of the values are specified then the system date is taken as the default planned end date.

The scheduled end date for a task is calculated based on the scheduled start date and the planned effort. If the planned effort is changed, then the scheduled end date changes accordingly

The Actual Start Date on a task is set to the current system date when the task status with the Working check box is selected for the first time. The Actual End Date is automatically set to the current system date when the status is changed to a status for which the Working check box is deselected (a non working status) and the actual start and end dates have no value. The actual start and end dates can be overridden either manually or when the task is debriefed.

Each task of a service request has its own address. The incident address from the service request is also displayed as the task address, which can be changed by specifying a different address from the Task Address list. The Task Address list displays all values as shown in the service request header incident address and the one time address, if the service request incident address is a one-time address. If you change the service request incident address, the same is copied to the task except when the task address is changed manually.

If you are creating a task that requires a dispatch of an engineer to the customer site, then make sure that you select a dispatch task type and that you have entered an incident address. For Field Service tasks you can provide additional information by using the following buttons:

- The Parts Requirements button enables you to enter, query, or update parts requirements associated with field service tasks.

- The Skills Assignment button enables you to enter, query, or update skills associated with field service tasks.

- The Access Hours button enables you to enter or update access hours associated with field service tasks. Access hours are automatically generated for field service tasks based on the value in the CSF: Automatic Association of Access Hours to Field Service Task profile option.

Your system administrator can set up tasks that are automatically displayed here for the service request type you have selected.

You can seek customer confirmation on the time when the customer is able to meet a technician using the Confirmation list of values. A customer confirmation receipt can be Required, Not Required, or Received. The Confirmation list is not available when a task status is Working, Completed, or Closed.

You can attach and view files to a service request task. The Attachments button is enabled only if you can update the task.

You cannot manually assign an overlapping Field Service task to a technician. A warning message is displayed if you do so. Click Yes in the message to create the task and No to stop the process and specify a new scheduled start date. An overlapping task can belong to the same or different service requests.

About the Interactions Tab

Use this tab to view service request interactions. An interaction comprises all activities between the time agents receive a call or start an interaction until they end the interaction or wrap up the call. An interaction can have multiple activities. Some activities, including service request updates, creation of associated tasks, and sending e-mails, are automatically recorded by the application. Agents can add information on other activities, such as customer meetings and visits, in the Call Wrap-up window.

If you want to view any e-mails sent in the context of the service request, the search for and double click on the activity of type "Composed a new outbound e-mail."

About the Related Objects Tab

Use this tab to specify the relationship of the service request to other service requests and to other objects such as a maintenance plan.

For example, you can use this tab to specify that a service request is a duplicate of another, or the cause of another.

The following table explains the relationships that you can specify for the linked object:

Relationship	Action	Example
Caused by	Linking service request A to service request B using a " Caused by" relationship indicates that A is caused by B.	A customer contact calls to say his e-mail is not working. You log service request A only to discover that the system administrator has already logged service request B to track this problem. The contact's e-mail is not working because the e-mail server is down. You create a "Caused by" link in A to B. The application automatically sets the status of A, the contact's service request, to "Waiting". When the system administrator resolves the e-mail server failure and closes the server problem service request B, then the application automatically updates the service request status of A to "Clear".
Duplicate of	Linking service request A to service request B with the " Duplicate of" relationship indicates that A is a duplicate of B.	All call center agents have been notified of the e-mail outage. Subsequently, an employee logs a ticket to report the e-mail outage. The agent who is assigned to work on the service request identifies it as a duplicate and enters the "Duplicate of" link. The application automatically closes the employee's service request with the resolution code of "Closed as Duplicate" and a reference to the service request already logged for the e-mail outage.

Relationship	Action	Example
Refers to	If service request A "Refers to" service request or document B, this means that B has information relevant to A. The application automatically creates the reciprocal " Reference for" relationship from B to A provided both documents are service requests. Agents can use this type of relationship for linking a service request to another object, such as a maintenance plan.	An agent working on a service request remembers that a similar service request is created for another customer. By creating a link to the old service request, he makes it possible for others to refer to it.

For a detailed overview of linking, see Service Request Linking to Specify Duplicates and Other Relationships, page 9-1.

About the Service History Tab

The Service History tab displays service requests for the customer. You can filter by a specific instance, instance component, instance sub-component, item and customer, item component, and item sub-component.

The application does not display service requests that were created for customers who may have owned the item instance in the past. This can happen when item instances that have been transferred from one customer to another.

About the Charges Tab

You can use the Charges tab to bill customers for service and to handle returns.

The following table describes the subtabs through which you can enter and view charges.

Subtab Name	Function
Action	View, edit, and enter the activity type and specify quantity for the charge line. Activities include, for example, labor, expenses, and returns.

Subtab Name	Function
Item Instance	View and edit information for charge lines related to install base items.
Pricing	View and adjust pricing information derived from the pricing rules.
Pricing Rules	View and edit the information that controls the way an item is priced.
Bill To	View and modify billing information. The address on the service request's Address tab is displayed as the default Bill To address.
Ship To	View and modify shipping information. The address on the service request's Address tab is displayed as the default Ship To address.
Order Details	View and edit additional information for creating an order.
Order Status	View information about an order submitted to Oracle Order Management.
Source	If a charge line originates from an Oracle Field Service debrief or from an Oracle Depot Repair repair order, you can view the original documents from this tab.

Key fields include:

- Charge Line

  Choose Estimate for creating charge estimates. Choose Actual for actual charges.

- Operating Unit

  By default, the operating unit value displays the organization that recognizes the debit or credit from the charge line. If the Service: Restrict Operating Unit by MOAC is set to Yes, then the operating unit displays the value based on the setup defined in the Multi Org Setup window.

- Business Process

  The default business process is set based on the service request type. The business process determines which contracts apply and the level of coverage a customer may

receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

- Service Activity

  Enter the purpose of this charge line, for example, Return, Labor, and Expenses. The selections are specified by your administrator.

- Item

  Inventory number of the labor, material, or expenses item. You must make an entry in this field even if you are entering a charge line for an install base item a customer is returning.

- Revision

  Revision code for the inventory item. This field is automatically enabled when you enter an inventory item number that is revision controlled.

- Billing Type

  Read-only field that displays an Oracle Inventory item attribute. The type can be material, labor, expense, and other user-defined types.

- UOM

  Unit of Measure. The default value depends on the item selected.

The following table describes key buttons and check boxes in the Charges tab:

Name of Button or Check Box	Function
Auto Generate button	Pulls in-progress lines from Field Service Debrief. The button enables a billing clerk to determine the charges incurred thus far on a task that has not yet been completed. The charge lines created when this button is selected have a charge line type of In-Progress and are only temporary. When the task has been completed, these lines are overwritten by the actual charges incurred by the customer.
"Charge line status details" button (button with ellipsis on the Action subtab)	Displays a note with the details for a particular line status. This note can be used to review field service charges that have been restricted or failed automatic submission criteria to be inspected manually.

Name of Button or Check Box	Function
Charges Report button	Displays a simple Charges report that contains basic information about charge lines related to a specific service request.
Copy to Actual button	Copies an estimate line and creates a new actual charge line.
Display Contract	Enables you to look at the coverage for the currently selected charge line, using the Contracts Coverage window.
No Charge check box	Determines whether a charge line should be submitted to the customer for billing.
OM Interface check box	Causes the charge line to be eligible for an order in Order Management. If the check box is deselected, then the charge line does not result in an order line when charges are submitted. Its default value is determined based on the setup of the service activity code.
Submit button	Submits to Oracle Order Management all charge lines of type Actual that have not yet been submitted and have the OM Interface check box selected. Creates orders and order lines and records changes in the Oracle Install Base installation details.

The following table describes key fields.

Field	Description
Billing Type	Oracle Inventory item attribute that indicates the type of item, including material, labor, expense, and other user-defined types.

Field	Description
Business Process	Used to group service activity codes to be used for charge and contract purposes. On a charge line, after the Service business process has been selected, the Service Activity Codes LOV is limited to those types that are associated with the selected Service business process. On a contract, a coverage is created for a specific Service business process. In this way, you can control which service activity codes are covered by a contract. The contract LOV on the charge line is limited to those contracts that cover the selected Service business process. Examples of Service business processes are Field Service, Depot Repair, and Customer Support.
Order Management Mapping	Each service activity billing type maps to a specific type of Order Management order header and order line type. Because Order Management header and line types are not used across operating units, the Charges setup process enables a unique header and line type to be associated with a Service activity billing type for each operating unit. These are retrieved and used when orders are created in Oracle Order Management.
Service Activity	Indicates what the charge line is for. For example, return, installation, removal, or preventative maintenance.

About the Work Orders Tab

This tab displays any associated Oracle Enterprise Asset Management work orders.

About the Maintenance Requirements Tab

Use this tab to review any Oracle Complex Maintenance Repair, and Overhaul maintenance requirements relevant to the service request.

About the Custom Tabs

Your application administrator can create two custom tabs for additional data entry.

About the Note Details Window

Use this window to add a note additional text up to 32,000 characters in length.

> **Note:** The additional text you enter in the Note Details window is not visible in the notes log or notes summary, and is not used by the application for knowledge base solution searches. You cannot search on this text.

About the Create Contact Window

Use this window to create additional contacts for a customer.

You must choose an existing customer address for the contact using the Select Address button (located to the right of the Address line). You can edit the address using the Address Details button located to the right of the Select Address (button with an ellipsis icon).

If you need to create a new address, please do so in the Contact Center.

About the Find Service Request and Find Installed Base Windows

Click on the topic you wish to view:

- About the Find Service Requests Window, page F-20
- About the Search Installed Base Window, page F-42

About the Find Service Requests Window

Use this window to find customer service requests. You can save frequently used search criteria for reuse.

Use the Basic tab to search by individual search criteria. You can search for service requests based on customer name, customer number, customer account, customer city, customer postal code, customer country, customer site name, customer site number, and customer site addressee. You can also search using wildcard (%) for serial, tag and incident address fields such as Site Name, Site Number, Addressee, Address, City, State, Postal Code, County and Province.

- You can search for requests based on either the name of the customer or instance, or the incident address. Click the search icon for customer, instance, or the incident address to display the respective search form. Based on the criteria that you specify in this window, the other service request details are displayed in the Find Service Request window.

Based on the criteria that you specify in this window, search results are displayed in the Find Service Request window.

- You can set the default values for the contact type and customer type lists by specifying the value in the following profile options.

  Service: Default Contact Type in Find Service Request – Use this profile option to set the default value for the Contact Type list. The available values for this profile option are Contact and Employee.

  Service: Default Party Type in Find Service Request – Use this profile option to set the default value for the Customer Type list. The available values for this profile option are Person and Organization.

You can search for requests based on the incident address. If the One Time Address check box is selected, then service requests whose incident addresses are marked as one time addresses only are displayed, else all service requests are displayed.

You can search the text of service request summaries and notes with the following options:

- Any Word: Finds service requests with notes or problem summaries that contain any of the key words.
- All Words: Finds service requests with notes or problem summaries that contain all the key words in any order.
- Phrase: Finds service requests with notes or problem summaries that contain an exact match of the key words.

You can also search based on the project related details, including project number and project task number, if your service request includes a project. For more information, see Integration with Oracle Projects.

However, to view these fields, you have to enable them through the folder functionality.

Use the Advanced tab to search by ranges of one or more criteria, for example, to search for all the service requests you must respond to by the end of the month, all service requests with a specific status, or all service requests with the same incident address.

If you enter multiple search conditions on the Advanced tab, all of them must be satisfied in the search results.

About the Create Tasks from Template Group Window in Service Request

Use this window to specify a template you want to use to create tasks for your service request. The templates must be set up by your application administrator.

Select the Show All Template Groups check box to view all template groups. The default value for the check box depends on the value set in the Service: Default Task

Template Groups LOV Behavior profile. You can select from any one of the following values:

- Filter Task Template Group LOV by Service Request Attributes - The Show All Template Groups check box is deselected and the Template Group field displays only the filtered task template groups that match the service request attributes including service request type, problem code, item, and item category.

- Show All Task Template Groups for Service Request - The Show All Template Groups check box is selected and the Template Group field displays all task templates for the service request. This is the default value for the profile.

In the Template Group field, select the template group based for the tasks you want created.

The Source Document field must display "Service Request" as the tasks are being created for a service request.

Source Value populates with the service request number. You can select a different service request number if you wish to create the tasks for a different service request.

The default Owner Type and Owner fields are based on the values specified in the system profile options. You may change these values. Task Owners are the individuals responsible for ensuring the tasks are completed, not necessarily the individuals performing them (task assignees).

About Choosing the Report Format

Choose the type of report you want using the Template list. For example, you may be able to choose from a detailed and a summary report.

The Locale field specifies the language of the report.

Choose a format for the report, for example, HTML, PDF, or RTF.

Choose the time zone for which you want to generate the report. You can select the agent, server, contact, or the customer time zone format to view the report.

Click **Run** to generate the report.

About the Log and Notes Window

You can use this window to view the log of activities in a service request, the notes entered, and enter new notes.

Note:

- Use the check boxes at the top of the window to filter the log display. The Audit check box restricts the display to service request changes only. Knowledge to the linked knowledge base articles.

- Use the Time Zone list to select the time zone for the incident. You can select the agent, server, contact, or the customer time zone format to view the audit log and notes for the service request.
- The New button creates a new note.
- The Print Friendly Format button makes it possible for you to create a log report in a number of formats including PDF, HTML, and RTF.
- Use the Sort list to display the latest or the earliest transactions. All sub-objects of a service request, which are audited, are displayed in the selected chronological order.

About the Person Details Window

Use this window to enter educational and employment histories and other personal information about consumers. Your organization may track this information for marketing campaigns and other sales activities.

About the Profile Window

This window displays key information about the customer. Click Refresh to update the information. You can view more information about the customer and drill down to individual items on the Contact Center's Dashboard tab.

About the Customer Relationship Actions Window

The application monitors customer statistics and alerts you with a message or a script when the customer you are working on meets the conditions specified by the application administrator. For example, the application can alert you when a customer has a contract that is scheduled to expire and includes a script you can launch that can show you how to handle the contract renewal process with the customer.

Notes:

- Remind Later: minimizes the window and enables you to address the issue later.

  After you click this button, the label changes to Remind Now and the minimized window is positioned in the upper left corner of the Contact Center window. When you are ready to review the messages with the customer, you can select the Remind Now button at any time to resize the Customer Relationship Actions window to its original size,

- Execute: launches a script.

  This button is only available if there is a script associated to a relationship plan.

If there are scripts associated they appear in the lower region of the screen. If there is more than one script you must choose a script prior to selecting the Execute button.

- OK: exits out of the Customer Relationship Action window.

About The Contact Center

The Contact Center window is designed for call centers handling customer requests via multiple channels. It provides the central place for Tier-1 agents to view and update customer information that has been collected by the entire Oracle E-Business Suite of applications. It also provides a quick way to create service requests, check entitlements, and resolve customer issues with knowledge base searches.

Information is available on the following window features:

- Contact Center header, page F-25
- Dashboard tab, page F-25
- Interactions tab, page F-25
- Notes tab, page F-26
- Tasks tab, page F-26
- Service Request tab, page F-26
- Contracts tab, page F-28
- Install Base tab, page F-28
- Invoices tab, page F-29
- Orders tab, page F-29
- Collateral tab, page F-29
- Addresses tab, page F-30
- Contact Points tab, page F-30
- Accounts tab, page F-30
- Party Information tab, page F-31
- Relationships tab, page F-31

About the Contact Center Header

The Contact Center header displays identifying information about the customer and customer contact. Use the header to:

- Quickly display customer information using unique identifiers using the Search By list at the top left hand corner of the window.

  Most of these unique identifiers (service keys) are self-explanatory except:

  - Tag Number: install base identifying number.
  - Instance Name: install base name.
  - RMA Number: return number
  - Number: customer number
  - System: install base system name.

- Filter the display of the window either by the customer or the customer contact using View Details For on the right-hand side of the window.
- Click the Open Email Compose Window to the right of the Email field to send an e-mail to the contact.

About the Dashboard Tab

The Dashboard tab provides you with an overview of the customer or contact. What is the level of customer satisfaction, high or low? Is the customer loyal or critical? The credit rating good or bad?

You can use the View Details For list in the header to specify if you want to view information about the customer or the contact.

By selecting customer from the list and selecting the View By account check box, you can view the account level information for a particular customer.

Based on your implementation, double click on the individual statistics or click View Details to drill down to view the individual details that make up the customer statistics. For example, if the customer has three expiring contracts, you can drill down to view the individual contracts by double-clicking on the dashboard entry.

About the Interactions Tab

The Interactions tab displays the history of interactions your organization has had with the customer or the customer contact depending on the selection you made in the View Details For list in the header.

You can view details of an interaction in the Activity Details region.

About the Notes Tab

The Notes tab enables you to create notes and view notes for a customer or a contact based on the selection in the View Details For list.

You can display notes based on the source of the notes. If a note is created from a source other than the Contact Center, then it must be related to a party before it is displayed in the Notes tab. Use the CS_CC_NOTE_TYPES lookup to define the note source. For example, task notes, service request notes, order notes, opportunities, or leads.

Each lookup code for the new lookup_type must correspond with a source object code in the Source and Note Type Mapping page.

About the Tasks Tab

The Tasks tab makes it possible for you to review existing tasks regarding the customer and to create and assign new tasks. Note that this tab is designed for creating tasks specific to the customer only such as appointments, call backs, and visits. You must use the Service Request window to create tasks for the resolution of service requests.

The Assignee of the task is the individual who performs the work. The Owner of the task is the person who supervises its completion. They can be the same person.

You can assign the task manually using the Lists of Values, or use the Assignment Manager by clicking the Assignment Manager button next to the Owner or Assignee fields.

Use the Add Notes button to add a note to a task.

Use the Use Template button to create tasks with a template set up by your application administrator.

Use the More button to add additional details to the task you have created. For example, if the tasks are recurring or requires you to assign multiple resources.

About the Service Request Tab

Use the service request tab to create a service request and view existing service requests for the customer.

You can filter the existing service requests list by date, and by criteria in the Filter By list such as the customer product. Selecting a request in the list displays the details below.

You can also create a service request:

- Enter the serial number, instance number, or tag number to display the customer product that is the subject of the service request. The instance number is the Oracle Install Base identifying number.

- Classify the customer problem using the Type field. Choosing the type affects the assignment of this service request to other agents for resolution, and determines who can view and update the service request. A service request type can also trigger the application to populate the service request with tasks designed to solve that type of problem, to specify the contractual response and resolution times, and even to launch Oracle Workflow processes.

- Use the Status field to specify where the service request is in its progress towards resolution. Selecting the correct status is important because some statuses can lock the service request so it cannot be updated, or launch an approval process.

- Use the Severity field to indicate the importance of this service request. The Severity of a service request can determine its priority in automatic work assignments.

- Use the Business Process field to specify the business process for the service request. The business process is based on the service request type but you can select a different business process for a service request. This field must be displayed through the folder functionality.

- Reassign the service request to another group or an individual using the Group or Owner fields. If you have automatic assignment implemented, you can have the application do the assignment for you simply by leaving these fields blank. Click the Assign Group or Assign Owner buttons to assign with the assistance of the Assignment Manager module.

  Note: You can set up system profiles that speed up service request creation by setting the default values for all the required fields except the Problem Summary. See System Profile Options You Can Use to Default Information in Service Requests , page F-33for a list of the profile options.

- Enter the incident address for the customer or search for incident addresses. The incident address details displayed in the Contact Center are similar to those displayed on the Service Request window. See About the Service Request Header, page F-3 for more information.

- Use the Expenditure Org. and the Project-related fields to associate a project with the service request. Project-related information displayed is project number, project name, project task number and project task name. The information displayed in the project number and the expenditure organization LOVs are based on the operating unit on the service request.

  These fields are hidden out-of-the-box and can be displayed through the folder functionality.

- View the service contracts coverage for a customer or item. View the name of the

coverage, the coverage description, and the type of coverage. Click the Details button (glasses icon) to view the coverage details for a contract.

- Select the sales order number from the LOV to add the charge lines.
- Click the **Quick Task** button to create and update tasks for the service request.
- Click the **Search Knowledge** button to search the knowledge base for solutions to your customer issue.

  When the *Knowledge: Search to display for integrating applications* profile option is set to *InQuira Search*, the InQuira solutions page is displayed along with the service request summary.

  You can also click the **Knowledge base search** option in the More Tools menu to go to the InQuira Information Center.
- The Charges button switches to the Charges page where you can enter charges for customer billing.
- The Details button opens the service request in the Service Request window.

About the Contracts Tab

Use the Contracts tab to view customer contracts.

The left side of the window displays all customer contracts. The right side displays the level of coverage and other basic information of the contract you select.

You can display a subset of the contract using the Filter By list or by entering a date range.

To view contract coverage details, click Coverage Details.

The Include Ineligible Contracts check box displays expired contracts in your list.

About the Install Base Tab

Use the Install Base tab to view the products the customer owns and to quickly create a service request and take other actions against them.

Use the Find Instances button to search for and display customer products in the Query Results subtab.

You can take an action on an item, create a service request, for example, by selecting the item and selecting an action from the Action list. The actions you can take are specific to your implementation. You must contact your application administrator for details.

Select an item on the Query Results subtab and click Add to Selected to display a subset of the items on the Selected Instances subtab. The selected items appear on the Selected Instances subtab.

About the Invoices Tab

Use the Invoices tab to view customer invoices. Refer to the *Oracle Advanced Collections User Guide* for more information.

About the Orders Tab

Use the Orders tab to view existing customer orders and to create new ones. Your application administrator can configure this tab to provide you with the ability to perform any of the Oracle Order Management functions you need.

See the *Oracle Order Management User Guide* for information on how to use the order functionality.

The Order List subtab lists customer orders. You can drill down on any order to view details.

> **Note:** The application administrator determines the user interface where the order details display by setting the Customer Care: Launch OM details window profile option. The available values are Oracle Order Management sales order forms, the Line Items and Order Information subtabs, and external custom windows. See Modifying the Behavior of the Orders Tab, page 34-13.

Click **New** to create a new order.

The Order Information subtab displays information about individual orders.

The Line Items subtab makes it possible for you to view and add order lines.

The Price Summary subtab displays pricing information for the order.

The Actions button available in the tab includes actions available in Oracle Order Management as well as the "Add to Installed Base" action which is unique to service. Use the "Add to Installed Base" action to add new Oracle Install Base instances.

About the Collateral Tab

Use this tab to send both electronic and physical collateral to customers.

Electronic collateral consists of a cover letter and other electronic files. You can choose to send the cover letter, the file, or both through e-mail, fax, or to a printer. These files are created in Oracle Marketing and are sent through an e-mail server, a fax server, or to a printer.

Physical collateral is tracked in Oracle Inventory and shipped through Oracle Order Management.

This functionality is enabled through Oracle TeleSales. For additional information, refer to the *Oracle TeleSales User Guide*.

About the Addresses Tab

Use the Addresses tab to enter and update customer or customer contact addresses, based on your selection in the View Details For list.

Use the Site Usages region to specify the uses for an address. A single customer address or site can have multiple uses. For example, the same address can be both the shipping and billing address as well the address where the equipment to be serviced resides.

If you have multiple addresses for a single usage, use the Primary Sites region to specify the primary address. For example, a customer with ten offices may have a separate billing address for each site. Specify a primary address from the list of billing addresses. By default, the primary address appears on invoices and other documents.

> **Note:** If you do not specify a primary address for a particular use, the application sets the first address as the default.

About the Contact Points Tab

Use the Contact Points tab to enter customer and contact phone numbers, e-mail addresses and other contact information.

Use the Primary Contact Points region to specify which of the contact points the application displays by default whenever you display the customer in the Contact Center.

The Preferences button makes it possible to enter contact preferences including information about any restrictions your organization must follow when contacting this customer.

About the Accounts Tab

Use this tab to review customer account information from Oracle Receivables.

Click New and enteri an account name to create a new account. The application creates an account number for the new account that is the same as the Customer Number used in Oracle financial applications.

The Customer Standard button launches Oracle Receivables' Customer Standard window. This option is available only if your organization is using Oracle Receivables and you have been assigned the appropriate Oracle Receivables responsibility.

Click Details to manage basic account details, such as account relationships, contacts, and account billing and shipping addresses.

See Oracle Receivables documentation for information on managing customer accounts.

About the Party Information Tab

Use this tab to enter either customer or customer contact information, depending on the selection you have made in the View Details For list in the header.

You can also store the party level restrictions in this tab.

About the Relationships Tab

Use this tab to specify the relationships for the organization or contact, depending on the selection you have made in the View Details For list in the header.

If your customer is an organization, then you can use this tab to capture:

- The customer's relationship with other organizations already in your database, for example, that customer A is a competitor of customer B and a subsidiary of customer C.

- The customer's relationships with individuals already in your database, for example, that person A is an employee or CEO of your customer.

If your customer is a consumer, then you can use this tab to capture:

- Relationships the consumer has with other consumers, for example, person A is a parent of person B or person A is a contact for person B.

- Capture the consumer's relationships with organizations they work for or belong to, for example, person A is an employee of Organization A or a board member of Organization B.

> **Note:** The list of values you use to select the individual or organization for the relationship, includes all parties in your database, so make sure that you know the exact name to minimize long searches.

About the Organization Details Window

Use this window to classify the organization's interests according to the classification system set up by your organization.

About the Customer Account Details Window

Use this window to make an existing customer address available as a billing or shipping address for an account in Oracle Financial applications. If you are billing a customer for work performed on a service request, then the link is automatically created. You must create a link in this window to use, an address that has been used in

a transaction, in financial applications.

You can also:

- View the credit status of the account on the Credit tab.
- Grant customer contacts access to account information on the Roles tab.
- Select a customer address as the billing or shipping address for the account on the Sites tab.
- View and create new relationships between accounts on the Relationships tab.

About the Contact Preferences Window

Use the Contact Preferences window to specify customer contact preferences. For example, you can specify any restrictions on customer contacts, if a customer wants to be contacted during specific hours.

About the Identifying Address Window

A customer can have many addresses, but only one identifying address that displayed by default in the Contact Center header whenever you display the customer record.

Use the Identifying Address window to designate a customer address as the identifying address.

However, to create new addresses, you must use the Addresses tab of the Contact Center.

About the Party Site Contact Points Window

Use this window to enter contact information tied to a specific site rather than to a contact or the company as a whole. You may want to do so if your organization services equipment installed in a room with its own phone number which is not tied to any specific individual customer contact.

> **Note:** Other agents can view the contact information you enter only when viewing site information. Information entered in this window does not appear among the contact points for the customer as a whole.

About the Process Messages Window

Use this window to troubleshoot the booking of orders in the Contact Center. See the *Oracle Order Management User Guide* for more information.

About the Notify Window

Use this window to send notifications using Oracle Workflow messaging to responsibilities. Enter a responsibility and a message, and click **Send**.

About the Item Instance Window

Use the Item Instance window to view and update details for the install base instances you have selected in the Contact Center. See the *Oracle Install Base User's Guide* for details on how to update instances.

About the Find Item Instance Window

Use this window to find customer owned products in the install base for display in the Contact Center.

Enter the search criteria and click Find Instances to display the Query Results subtab on the Contact Center's Install Base tab.

About the Quick Task Window

The Quick Task window enables you to create and update service request tasks for the service request selected in the Service Request tab of the Contact Center.

Select the Restrict Closure check box to prevent the service request from being closed before this task is completed. Service requests and tasks can be closed independently of each other unless you do so.

The Assignee of the task is the individual who performs the work. The Owner of the task is the person who supervises its completion. They can be the same person.

For assigning field service tasks and adding additional task information use the Service Request window instead. Click the Schedule Task button at the bottom of the Service Request tab in the Contact Center to display the Service Request window from where you can assign tasks.

System Profile Options You Can Use to Default Information in Service Requests

The table below lists some of the system profile options you can use to automatically fill in information into new service requests. The Service Request Field column specifies the field. The System Profile Name column lists the system profile name. The Description column includes information on valid values.

Service Request Field	System Profile Name	Description
Advance Scheduler icon	CSF: Default Scheduling Type	Enables the Scheduling Task window to display in the Advice tab by default.
Assignee	Service: Default Task Assignee on the Service Request Tasks Tab	Sets the default assignee for the task, the person assigned to complete the task.
Assignee Type	Service: Default Assignee Type on the Service Request Tasks Tab	Sets the default assignee type. Valid Values: Employee Resource, Group Resource, Team Resource, Supplier Contact
Bill To and Ship To (on the Contact/Address tab)	Service: Default Bill To and Ship To Address Options	Sets the default Bill To and Ship To address information either from the customer or from the Install Base. Valid values: Default from Customer, Default from Installed Base
Default Tab in the SR form	Service: Service Request Default Tab	Sets the default tab that is displayed when you click the New icon on the toolbar, either from the Navigator or the Service Request window.
From and To fields	Service: Time Span for Notes	Sets the default number of days for displaying service request notes.
Group	Service: Default Group Owner for Service Requests	Sets the default group owner of a service request. This is the group responsible for ensuring the service request is resolved.

Service Request Field	System Profile Name	Description
Install Base Search form	Service: Display Search Installed Base Form by Default	Sets the Installed Base Search window as the default window when the service request form is displayed. Valid values: Yes, No
Item	Service: Service Request Creation Product List Filter	Determines whether the list of items in the Item list of values includes both items in inventory and install base. Valid Values: Inventory, Instance, All
Make Public (Service Request window header check box)	Service: Default Make Public Flag **Note:** This profile option is not used right now for the visibility of service requests on iSupport. It is intended for future use.	Sets the default check box on the service request header and determines whether a service request is visible to customers on their Oracle iSupport Web portal. Valid Values: Yes, No
Owner Type	Service: Default Owner Type on the Service Request Tasks Tab	Sets the default Owner Type field. Valid values: Employee Resource, Group Resource, Team Resource, Supplier Contact
Owner (service requests)	Service: Default Service Request Owner	Sets the default value for the service request owner.
Owner (tasks)	Task Manager: Default Task Owner	Sets the default task owner. Valid values: Any valid resource from the selected Owner Type.
Priority (tasks)	Task Manager: Default Task Priority	Sets the default task priority.

Service Request Field	System Profile Name	Description
Respond By	Service: Default Coverage for SLA	Sets the default response and resolution times for service requests that do not have an applicable contract.
Resolve By	Service: Default Coverage for SLA	Sets the default response and resolution times for service requests that do not have an applicable contract.
Respond By and Resolve By	Service: Date to Calculate SLA	Sets the date to be used when calculating SLA. Valid values: Reported Date and Created On Date
Severity	Service: Default Service Request Severity	Sets the default severity for the service request.
Status (service request status)	Service: Default Service Request Status	Sets the default status for the service request.
Status (tasks)	Task Manager: Default Task Status	Sets the default task status.
Status (notes)	Notes: Default Note Status	Sets the default status of new notes. Public makes it possible for Oracle iSupport users to view the note. Valid values: Private, Public, Publish Default value: None
Subject	Service: Default Task Subject from Problem Summary	This profile option provides the service request problem summary as the default text for the task subject. The profile option is enabled only for the first manually created tasks.

Service Request Field	System Profile Name	Description
Time Zone list	Service: Default Time Zone Source	Sets the default value for the Time Zone list in the following windows: Task tab, Log and Notes, Service Request Detail Report, and the Print Friendly Notes window in the.Workbench tab. Valid values: Corporate (server), Agent (client), Customer, Contact and Incident.
Type (service request)	Service: Default Service Request Type	Sets the default service request type.
Type (tasks)	Task Manager: Default Task Type	Sets the default task type.
Type (note)	Service: Default New Note Type in Agent-Facing Applications	Sets the default note type.
Urgency	Service: Default Service Request Urgency	Sets the default service request urgency.

You can set the system profiles by navigating to Others, and selecting Profile System Values.

Notes:

- Select the User and Profiles with No Values check boxes in the Find System Profiles window.
- Use the User list of values to enter your user name.
- To view a subset of the system profile options that the user can define, enter a partial name in the Profile field. You can use the percent sign (%) to indicate partial names. For example, "Service%" displays all the profile options starting with the word Service.

About the Contracts Window

Use the Contracts window to check customer entitlements. Click **Get Contracts** to display applicable contracts to the service request you have displayed in the Service Request tab of the Contact Center. The All Contracts option displays both active and expired contracts.

Selecting a contract attaches it to the service request and is the basis for setting the response and resolution times.

Click the Details button (eye glasses icon) to view coverage details.

About the Task Details Window

Use this window to enter additional task information. For details see the *Oracle Common Application Calendar Users Guide*. Here is some basic information about each tab:

- Resources: Use this tab to assign a task to multiple assignees and to specify resources such as the tools needed to complete a task.
- Dependencies: Use this tab to specify the desired order among tasks.
- References: Use this tab to link tasks to a source document such as the service request that resulted in the creation of a task.
- Dates: Use this tab to specify date types.
- Contacts: Use this tab to enter contacts.
- Recurrences: Use this tab for tasks that are to be performed on a regular basis. You may specify a daily, weekly, monthly, or yearly schedule.
- Others: Use this tab to enter the cost estimate.
- Audit: Use this tab to view changes to the task.

About the Create Tasks from Template Group Window in Contact Center

Use this window to specify a template you want to use to create tasks for the customer. The templates must be set up by your application administrator.

In the Template Group field, select the template group based for the tasks you want created.

Source Value populates with the name of your customer.

Task Owners are the individuals responsible for ensuring that the tasks are completed.

Assignee Type and Assignee are the individuals responsible for completing the tasks. If the assignee type or the assignee are not specified, then these values are displayed by default based on the profile options Service: Default Assignee Type on the Service Request Tasks Tab and Service: Default Task Assignee on the Service Request Tasks Tab.

If you click on the Create Tasks button on the Task Template window without specifying a task owner, then the task owner is automatically assigned based on the territory setup.

About the Create Customer Window

Use this window to quickly create a customer record.

To enter an address, you must either select an existing address from the database or enter a new address by entering a country and clicking the Address Details button (button marked with an ellipsis to the right of the Address field.)

Select the Create Account check box to automatically create an account along with the customer record.

About the Edit Customer Window

Use this window to quickly edit the identifying customer information for the customer displayed in the Contact Center header.

You can make changes to all the information displayed except the Party number and Account number fields.

If you wish to complete a change of address for a contact or perform any major updates to the address, you must specify an end date for the current address in the Addresses tab, and create a new address.

About the Customer Search Window

Use this window to search for and display a customer in the Contact Center, Service Request and Find Service Requests windows. You can speed up your search when you use the Search By field to search by unique identifying information such as a service request number, a contract number, a serial number, or a social security number.

Click Create Customer/Contact to create a customer and contact records.

About the Edit Contact Window

Use this window to quickly edit the primary contact information, the contact who appears in the Caller Information region of the Contact Center header

You can make changes to all the information displayed except the Party number and

Account number fields.

If you want to change a contact's address, you must specify an end date for the current address in the Addresses tab, and create another address.

About the Find Critically Overridden Customers Window

The application automatically designates a customer as critical whenever a customer meets conditions defined by your application administrator.

Use this window to find the history of any manual overrides to this designation.

If the organization you are searching for does not have any existing overrides and you want to create one, click the New button.

About the Override Customer Criticality Window

The application automatically flags a customer as critical whenever a customer meets conditions defined by your application administrator.

By default, the application flags a customer as critical if the customer has more than five open service requests.

Your administrator can specify different criteria for flagging customers as critical.

> **Note:** The administrator can have the application flag customers as critical using different criteria, by creating a new profile check and entering it in the system profile Customer Care: Profile Check for Determining Customer Criticality. For information about creating profiles checks, see About Customer Profiles, page 22-3.

Use this window to manually reset the criticality of a customer, making a noncritical customer critical or vice versa. You can also use this window to view the audit history of such manual overrides.

About the Nodes for UWQ SR Window

Use this window to create work queues specific to service requests in the Oracle Universal Work Queue window and to test your SQL.

About the Save Search Window

Use this window to name saved searches.

About the Service Request Runtime Attribute Capture Window

Enter the service request attributes on this window. The entries you make in this window provide additional information for the service request. They are stored as service request notes.

About the Maintenance Requirements Window

Use this window to review maintenance requirements.

About the Potential Duplicate Service Requests Window

Your administrator can set up the application to automatically detect potential duplicate service requests. Depending on the setup used, the application can detect potential duplicates when you:

- Enter a service request.
- Save a service request.
- Use Oracle TeleService to open a potential duplicate service request, that was created in Oracle iSupport.

Use this window to review the potential duplicates.

About the Quick Menu Window

You can use the Quick Menu to navigate to windows in other applications and pass on customer and other information from the current window. This saves you from having to change responsibilities and performing queries again to display the same information.

For example, if you are working on a service request for a product a customer owns, you can display information about the product from Oracle Install Base with two clicks of the mouse.

Only certain Quick Menu-enabled applications preserve the context in the new window. Contact your administrator for more information.

About the Copy Service Request Window

Use this window to copy a service request. You can change any of the default information for the new request, including Type, Severity, Owner, Urgency, Customer, Account, and Summary.

By default, all check boxes related to addresses, production information, contact

information, and automatic generation of tasks are selected from the Include region.

From the Include region, select the check boxes corresponding to the information you want to copy to the new service request.

If you do not want to link the original to the new request, then select the No Link option.

If you want to reference the new request to the original, then select one of the following:

- Create Reference Link: This option creates a link of type Refers to in the original and Reference for in the copy.
- Create Duplicate Link: The application creates a Original For link in the original and a link of type Duplicate Of in the copy.
- Create Caused By Link: Designates the original as the root cause of the new service request

About the Oracle Scripting Window

Use this window to launch a script to guide you through a customer interaction.

About the Resource Availability Window

Use this window to indicate if you are available or unavailable for work assignment. Deselecting the Available check box assures that you are not assigned work while on vacation or leave.

About the Call Information Window

Use this window to review information about the customer call. This includes information gathered automatically by Oracle Advanced Inbound that callers have entered on their telephone keypads.

About the Call Wrap Up Window

Use this window to enter information about your interaction with a customer.

About the Search Installed Base Window

Use this window to search through a customer's install base of products based on multiple search criteria in the Service Request and Find Service Requests windows.

Fields on the Basic tab include:

- Serial: Serial number
- Item: Oracle Install Base item
- Instance: Oracle Install Base item instance.
- System: Oracle Install Base system name.
- Tag: Oracle Install Base tag.

You can also search using free form text with wildcard (%) for most fields except Customer Number, Country, Order Date (Calendar), Sales PO Number, and Lot Number in this form.

The Advanced tab enables you to define one or more logical conditions for the search. For example: "Order Number > 2001".

The AND operator is used in the background to create a complex argument for multiple conditions. All the conditions must be satisfied.

About the Incident Address Search Window

Use this window to search for incident addresses based on multiple criteria in the Service Request and Find Service Requests windows.

Some of the fields on this page include:

- Incident Customer – Name of the customer who has the incident address associated with the service request.
- Site Name – Name of the incident site.
- Site Number – Number of the incident site.
- Addressee – Name of the incident addressee.
- Site Phone – Phone number of the incident customer.

You can also search using free form text wildcard (%) for most fields except Customer Number and Country.

About the Send Message Window

Use this window to send a message through Oracle Workflow messaging.

The recipient's name must be defined in Oracle Workflow roles.

Check Expand Roles if you plan to send this message to a Workflow role that includes several individuals and if you want each person to receive a copy of the message.

- By default (if this box is not selected), one message is sent to the role. If one individual responds to or closes the message, the message is removed from the inbox of all other individuals in that role.
- If you select Confirmation, you cannot select Expand Roles.
- If you enter an Action, you cannot select Expand Roles. The reason for disabling the Expand Roles function is because you may not want all recipients to perform the same action.

Optionally, select Confirmation if you want to receive a confirmation message once the recipient has responded to your message:

- If you select Confirmation, the From field is validated to ensure that the sender is a valid Workflow role.
- If you select Expand Roles, you cannot select Confirmation.

About the View Message Window

Use this window to view message history for Oracle Workflow messages.

About the Review Kits Window

Electronic collateral can be grouped into kits within Oracle Marketing. You can use this window to view kit details.

About the Review Order Window

Use this window to review collateral orders. Click the Submit Order button to submit the order to order fulfillment.

About the Audit History Window

Navigate to the Tools1 menu and click the Audit Report option to view the audit history of a service request.

About the Edit Address Window

Use this window to edit a customer or customer contact address.

About the Edit Contact Window

Use this window to edit basic information about a service request contact.

About the Fulfillment Request Window

Use this window to deliver a service request report by e-mail or fax via the fulfillment server.

You can view the status of your submission on the View tab.

About the Service History Window

Use this window to view the service requests that have been logged for the customer or against a customer product.

About the Drilldown List Window

Double click any item in the list to display the item.

About the Resource Availability Window

Use this window to indicate the availability of a resource to receive new service request or task assignments. This must be done when a resource is on a log break or is on vacation otherwise work may continue to be assigned to the resource through the automatic service request assignment process or by other agents using Oracle Assignment Manager.

Indicating the resource availability using this procedure does not affect incoming calls when the resource is working with Oracle Inbound. For incoming calls, if the resource is available to take a call whenever he or she logs in to a specific work queue and the resource is not on the phone with a customer. See the *Universal Work Queue User Guide* for more details on how you can indicate the unavailability to take calls.

About the Find Customer Information Window

Use this window to select a customer account for your order and specify the order usage for the account.

To do so, enter the name of the party you have displayed in the Contact Center header in the Customer Name field.

Click Find to display a list of available accounts for the customerm. After you have selected the account, choose the order usage on the Order Usage window. Only permitted account usage check boxes are enabled.

About the Relationship Plans Search Window

Use this window to:

- Search for an individual relationship plan you wish to modify or customize by entering the plan name.
- Display a list of the relationship plans for a customer by entering customer search criteria.

You can restrict your search by plan level:

- **Party**: Those relationship plans set up for the customer as a whole.
- **Account**: Relationship plans set up at the customer account level.
- **Both**: Searches all plans.

Or by plan type:

- **Template**: Searches all general plans.
- **Custom**: Searches for all customized plans.
- **Both**: Searches for both.

If you are searching by customer name or other customer attributes only, the search returns the customer record even if the customer has no plans in the portfolio. (In this case the Plan field is blank.)

If you are searching for a specific relationship plan, the search results display all customers with the plan. You can select any of the customer records to display the plan. If you wish to customize the plan for a particular customer, then select that customer.

About the Plans Summary Window

This window displays the customer's portfolio of relationship plans.

You can:

- Expand the hierarchy to view a list of all plans for the customer.
- Select a plan from the hierarchy to view its details in the right section of the window.
- View all customers who have been assigned to a plan by selecting the plan in the hierarchy and clicking the Inquiry tab.

Using this window, you can:

- Add a relationship plan to a customer's portfolio (Add/Remove button)

  This qualifies the customer for the plan even if they do not meet the qualifying condition. For example, if you know a customer is critical, you may want to alert

other agents regardless of whether the customer has the five escalated service requests normally required to trigger the plan. The plan still evaluates any additional conditions to decide what action to take.

- Remove a plan from a customer's portfolio (Add/Remove button)

  Agents in your organization no longer receive alerts or scripts from the plan for this customer even if the customer meets the plan conditions.

- Modify the plan criteria (Details/Modify button)

- If you are an application administrator, you can also create a relationship plan by clicking **New** and following the steps described in the Setting Up Relationship Plans chapter of the *Oracle TeleService Implementation and User Guide*. For an overview, see Process Overview of Relationship Plan Setup, page 23-4.

- View an audit of the usage of the plan by clicking Audit.

From the Plans Inquiry tab, you can:

- Disable the relationship plan for a customer by selecting the customer and clicking Disable. This is the same as removing the plan from the customer's portfolio.

- Customize the relationship plan by clicking Customize.

About the Modify Plans Window

You can modify the condition that qualifies a customer for the relationship plan by making entries in the Plan Criteria region:

- The Profile Check field displays the name of the profile check that collects data about your customer. Profile checks are set up by the administrator, so do not change the value without an understanding of the profile checks set up for your organization.

- You can modify the operator by selecting a different one using the Operator list.

- Based on the operator you select, you can modify the Low value, the High value, or both.

  Note: You cannot modify plan criteria if the plan is attached to a customer.

If you have the prerequisite programming and applications knowledge for creating relationship plans, then select the Plan Details tab and modify other plan conditions or actions according to the procedures described in the Setting Up Relationship Plans chapter of the *Oracle TeleService Implementation and User Guide*. For an overview of the

setup steps, see Process Overview of Relationship Plan Setup, page 23-4.

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