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Preface

This preface introduces information sources that can help you use the application and this guide.

Oracle Applications Guides

To find guides for Oracle Applications, go to the Oracle Help Center at http://docs.oracle.com/.

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1 Introduction

Agent Browser User Interface: Overview

The Agent Browser User Interface (Agent Browser UI) is a web browser-based user interface to Oracle Service Cloud, giving you one more way — along with the Microsoft® .NET-based dynamic agent desktop Smart Client and mobile agent app interfaces — to access Oracle Service Cloud.

Agent Browser UI allows you to:

- Access Oracle Service Cloud using devices that do not support Microsoft® .NET.
- Use environments where browser-based applications are required, for example when an organization’s compliance or governance rules mandate it.
- Access Oracle Service Cloud when installing and supporting the smart client agent desktop may not be viable, such as for light or infrequent users.

Related Topics

- Agent Browser UI Versioning

Agent Browser UI Versioning

The version of the Agent Browser UI site you use is independent of the Microsoft® .NET-based Smart Client version of Oracle Service Cloud you use.

When you request a new or upgraded Agent Browser UI site, the most recent release will be deployed. The specific set of features and functions available in your version of Agent Browser UI depends on the combination of the Oracle Service Cloud release and the Agent Browser UI release you have deployed. For information on specific Agent Browser UI features and functions available, refer to Answer ID 8173.

Related Topics

- Agent Browser User Interface: Overview
2 Getting Started for Administrators

Set up Agent Browser UI for staff members

You must complete certain administrative tasks before your staff members can begin using the Agent Browser UI.

Prerequisites

The Agent Browser UI feature for your site must be enabled and configured. Contact your Oracle account manager.

Steps

1. Assign permission for staff members to access Agent Browser UI on the Service Console of the Smart Client. Refer to Assign Agent Browser UI permission in profiles.
2. Create workspaces customized for Agent Browser UI on the Service Console of the Smart Client. Refer to Customizing standard workspaces for Agent Browser UI.
3. Assign custom workspaces to define the appearance of the desktop in Agent Browser UI on the Service Console of the Smart Client. Refer to Assigning Agent Browser UI workspaces.

Note: To learn about workspaces for Agent Browser UI, refer to Workspaces: Overview.

Next Step

After completing the setup steps, your staff members must use one of the following supported browsers to access Agent Browser UI:

- Windows 7 (Professional and Ultimate) (32 bit and 64 bit) SP1 with IE 11.x, Chrome 49 or greater, Firefox 45 or greater
- Windows 8.1 (Professional and Enterprise) (32 bit and 64 bit) with IE11.x, Chrome 49 or greater, Firefox 45 or greater
- Windows 10 with IE11, Chrome 49 or greater, Firefox 45 or greater
- Mac OS X with Safari 9, Firefox 45 or greater
- Tablets running iOS 8.2, 9.x with Safari 9.x or greater, Chrome 49 or greater
- Tablets running Android 5.x with Firefox 45 or greater

Related Topics

- Assign Agent Browser UI permission in profiles
- Customizing standard workspaces for Agent Browser UI
- Assigning Agent Browser UI workspaces
- Workspaces: Overview
Assign Agent Browser UI permission in profiles

Administrators can specify which profiles have permission to use Agent Browser UI on the Service Console of the Smart Client.

Prerequisites

You must be logged in to the .NET-based Smart Client.

Steps

1. Click the **Configuration** button on the navigation pane.
2. Double-click **Profiles** under Staff Management.
   
   The report opens on the content pane.
3. Double-click the profile you want to edit.

   The **Profile Editor** opens.
4. Click the **Permissions** button on the ribbon.

   The **Permissions** page opens.
5. Select the **Account Authentication** check box in the **Agent Browser User Interface** section on the **Administration** tab.

6. Click the **Save and Close** button on the ribbon.
3 Getting Started for Users

Log in to Oracle Service Cloud

Once you have a staff account and appropriate permissions, you will be able to log in to Oracle Service Cloud using the Agent Browser UI.

Prerequisites

You need to have a user name and password. If you have logged in to the Oracle Service Cloud .NET-based Smart Client, use those same credentials. Otherwise, contact your administrator for your credentials.

The Account Authentication permission for Agent Browser User Interface must be selected in your profile by the administrator.

Steps

2. Click Launch Browser Agent Desktop.
   
   The Login window opens.
3. If you need help logging in, for example, if you’ve forgotten your password, click Login Help.
4. Type your user name in the Username field.
   
   Note: Your user name and password are defined in your staff account and both are case sensitive.
5. If you have been assigned a password, type it in the Password field. (Passwords are optional in Oracle Service Cloud.)
6. Click Login.

Result

The Agent Browser UI main console is displayed.

Related Topics

- Agent Browser UI console overview
Agent Browser UI console overview

You can view and manage your Oracle Service Cloud data using the Agent Browser UI. Even though the Agent Browser UI has a different look from the Smart Client, they use the same field names and have many similar structures, allowing you to be productive right away.

Here is the Agent Browser UI main console, showing an incident opened in the incident editor on the content pane.
The global header region, at the top of the main console, contains options for working in Oracle Service Cloud. The following table describes the functions of the icons in the global header region.

### Table 1: Global Header Region Icon Descriptions

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Navigator Icon" /></td>
<td>Click the <strong>Navigator</strong> icon, located to the left of the Branding (logo), to display the navigation list that shows available reports and folders. Configure the navigation list on the smart client Navigation Sets editor.</td>
</tr>
<tr>
<td><img src="image" alt="Home Icon" /></td>
<td>Click the <strong>Home</strong> icon to display the default home report. To specify the default report, click the Navigator icon to open the navigation list, right-click the report you want to use, and click <strong>Set as Browser Desktop Default</strong>.</td>
</tr>
</tbody>
</table>
| ![Quick Search Icon](image) | Use the **Quick Search** functionality to easily find and open records. Your navigation set defines which Quick Search reports are available to you. You will have access to the same set of Quick Search reports in both the Agent Browser UI and the Smart Client. The **Quick Search** area is comprised of these separate components:  
  - The **text field** supports the first filter of the of the Quick Search report that is in focus, displaying the filter label if no value has been entered. Enter a value for the filter and press **Enter** to initiate the search.  
  - Click the **Search** icon (magnifying glass) to initiate a search using the filter value that is in the **text field**.  
  - Click the **three vertical dots** to display the full Quick Search region where you can select a Quick Search report from the drop down menu, enter information in the Quick Search fields, and initiate the search. |
| ![Recent Items Icon](image) | Click the **Recent Items** icon to display a list of recently opened items. By default, the last ten items you opened are listed, but you can increase or decrease that number by changing the navigation pane settings on the smart client. |
| ![Notifications Icon](image) | Click the **Notifications** icon to display the notifications pane where you can view and manage the notifications you receive. If your profile gives you permission, you can also send broadcast notifications from the notifications pane.  
When you have unread notifications, a red badge appears on the Notifications icon showing the count of unread notifications. If you have no unread messages the red badge does not appear. |
| ![Quick Create Icon](image) | Click the **Quick Create** icon to access a list of objects used to create new records. Only objects supported in Agent Browser UI will display in the list. Configure the list of items from the smart client Profiles editor. |
| ![Accessibility Icon](image) | Click the **Accessibility** icon to change accessibility mode, color contrast, and font size settings, or to reset to the default settings. Accessibility settings persist only for the current login session. |
Icon | Description
---|---
![Help](image) | Click the **Help** icon to view the Agent Browser UI online help documentation in a separate browser window.

![User Name](image) | Click the user name or the drop down arrow to the right of the user name to access the Settings and Actions menu. Available functions include the change password function, the Sign Out action, and the About selection which provides system and copyright information, including version information for both Oracle Service Cloud and Agent Browser UI.

---

The content pane, making up the remainder of the console, is where you work with reports and records. The following components may appear on the content pane.

- **Quick action** area—Buttons in this area are used as shortcuts to common commands. They are configured on the Quick Access toolbar for the workspace being used. You can add and remove buttons to and from the quick actions area using the workspace ribbon designer on the Smart Client desktop interface.

- **Actions** menu—This drop-down menu shows actions configured on the ribbon for the workspace being used. You can add and remove Action menu items using the workspace ribbon designer on the Smart Client desktop interface.

  **Note:** Ribbon tab and group labels are not rendered on the Actions menu.

- **Consistent actions** area—Buttons in this area are common commands, such as **Refresh** and **Save and Close**, always displayed for the particular workspace type or report. The consistent actions cannot be changed.

- **Tools** area—This appears only on the incident workspace, and is configured vertically on the right side of the workspace. It contains tool panels that expand and collapse when you click on the individual tool panel tabs. The following tool panels may be configured on your system.

  - Recommended Articles (for Knowledge Advanced)
  - Search Knowledge Base
  - Linked Knowledge Base Articles (for Knowledge Advanced)
  - My Favorite Knowledge Base Articles (for Knowledge Advanced)
  - Standard Text
The following image shows the buttons supported in the Actions menu, the quick actions area, and the consistent actions area for each type of workspace supported in Agent Browser UI.

<table>
<thead>
<tr>
<th>Button</th>
<th>Workspace Type</th>
<th>Custom Object</th>
<th>Incident</th>
<th>Organization</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to Incident</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add to New Incident</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Lead Role</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Links</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collaborate</td>
<td></td>
<td>A, Q</td>
<td></td>
<td>A, Q</td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td></td>
<td></td>
<td>A, Q</td>
<td></td>
<td>A, Q</td>
</tr>
<tr>
<td>Conference</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
</tr>
<tr>
<td>Delete</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
</tr>
<tr>
<td>Expand/Collapse</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
</tr>
<tr>
<td>Forward</td>
<td></td>
<td></td>
<td></td>
<td>A, Q</td>
<td></td>
</tr>
<tr>
<td>Guided Assistance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Info</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Join</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leave</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Links</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
</tr>
<tr>
<td>New Opportunity</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Offer Advisor</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Preview</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
</tr>
<tr>
<td>Propose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refresh</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>Reject</td>
<td></td>
<td></td>
<td></td>
<td>A, Q</td>
<td></td>
</tr>
<tr>
<td>Reset Password</td>
<td>A, Q</td>
<td>A, Q</td>
<td>A, Q</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Save</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>Save and Close</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>Screen Sharing</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Send</td>
<td></td>
<td></td>
<td></td>
<td>A, Q</td>
<td></td>
</tr>
<tr>
<td>Send and Close</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Spell Check</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Terminate</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Transfer</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Validate Category Links</td>
<td></td>
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<td></td>
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<tr>
<td>Wrap-up</td>
<td></td>
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</tr>
</tbody>
</table>

A: available as Actions menu buttons  
Q: available as Quick Actions area buttons  
C: default on consistent actions area

Creating and using workgroups

The Agent Browser UI console helps you manage multiple open records without confusion by grouping associated records into a single workgroup. When you have an open record and then open another record associated with the initial record, it is shown as a sub-tab of the primary record.
For instance, the incident workspace lets you add or edit other information associated with the incident, including contacts, organizations, and tasks. When you open a contact record associated with the open incident, the contact record opens on a sub-tab and becomes the active tab. This creates a workgroup consisting of an incident and a contact record.

All sub-tabs in the workgroup have a **Close** button, which takes action on the individual record within the workgroup. The workgroup also has a **Close** button, which takes action on all sub-tabs of the workgroup.
4 Workspaces in the Agent Browser UI

Workspaces: Overview

Workspaces define the configuration of the content pane when working in Oracle Service Cloud.

When you open a record—such as an incident or contact—the workspace determines the layout of fields, controls, and tabs on the content pane as well as the arrangement of buttons on the toolbar.

Workspaces for incidents, contacts, organizations, tasks, and custom objects are supported in Agent Browser UI, although not all fields and actions may display. Workspaces for answers, opportunities, assets, chat, quotes, and quote products, and all multi-edit workspaces are not supported in Agent Browser UI.

Customizing placement of workspace summary information

The summary panel may appear as the first tab in the primary tabset of a workspace or it may placed in a persistent panel above the primary tabset.

Use the .NET-based Smart Client to set the Summary Panel Alignment control Options property to specify the placement of the summary information of a record. Select the value First Tab to show the summary information in the first tab of the primary tabset. Select the value Top to show the summary information in a persistent panel above the primary tabset.

Customizing standard workspaces for Agent Browser UI

By default, standard desktop workspaces are used in Agent Browser UI, but you can create custom workspaces specifically for Agent Browser UI.

However, because unsupported fields and controls are simply disregarded in Agent Browser UI, some blank fields and controls may be displayed, which can lead to confusion. For example, if a tab contains an unsupported relationship item, the user will see a tab with no content. You can provide a better user experience by customizing the workspaces used in Agent Browser UI to include only supported fields and controls.

Below are specific procedures to create basic workspaces suitable for Agent Browser UI by altering the standard workspaces on the Service Console of the smart client.

Note: You may choose to further customize the workspaces you use for Agent Browser UI to suit your business needs and specific Oracle Service Cloud functions you use.

Related Topics

- Customize the standard contact workspace for Agent Browser UI
Customize the standard incident workspace for Agent Browser UI

Use the workspace editor in the Oracle Service Cloud Smart client to customize an incident workspace suitable for Agent Browser UI.

Steps

1. From the workspaces explorer, copy the standard incident workspace and rename it.
2. From the workspaces explorer, open the renamed incident workspace.
3. Remove the **Time Billed** tab, which contains the unsupported Time Billed relationship item.
4. Configure buttons in the quick actions area, by clicking **Configure Quick Access Buttons** in the ribbon designer. Supported buttons are **Copy**, **Delete**, **New**, **Reset Password**, **Send**, and **Print**. (**Refresh**, **Save**, and **Save and Close** buttons always appear in the consistent area to the left of the **Actions** menu.)
5. Configure buttons on the **Actions** menu in the ribbon designer. Supported buttons are **Copy**, **Delete**, **Forward**, **New**, **Reset Password**, **Send**, and **Print**. (**Refresh**, **Save**, and **Save and Close** buttons always appear in the consistent area to the left of the **Actions** menu.)

   **Note:** Because the **Send on Save** control is not supported in Agent Browser UI, it is important to include the **Send** button on either the quick actions area or on the **Actions** menu.
6. Click the **Save and Close** button.

Customize the standard organization workspace for Agent Browser UI

Use the workspace editor in the Oracle Service Cloud Smart client to customize an organization workspace suitable for Agent Browser UI.

Steps

1. From the workspaces explorer, copy the standard organization workspace and rename it.
2. From the workspaces explorer, open the renamed organization workspace.
3. Remove the **Hierarchy** tab, which contains the unsupported Organization Hierarchy relationship item.
4. Remove the **SLA** field, which is the unsupported SLA Container relationship item.
5. Configure buttons in the quick actions area, by clicking **Configure Quick Access Buttons** in the ribbon designer. Supported buttons are **Copy**, **Delete**, **New**, and **Print**. (**Refresh**, **Save**, and **Save and Close** buttons always appear in the consistent area to the left of the **Actions** menu.)
6. Configure buttons on the **Actions** menu in the ribbon designer. Supported buttons are **Copy**, **Delete**, **New**, and **Print**. (**Refresh**, **Save**, and **Save and Close** buttons always appear in the consistent area to the left of the **Actions** menu.)
7. Click the **Save and Close** button.
Customize the standard contact workspace for Agent Browser UI

Use the workspace editor in the Oracle Service Cloud Smart client to customize a contact workspace suitable for Agent Browser UI.

Steps

1. From the workspaces explorer, copy the standard contact workspace and rename it.
2. From the workspaces explorer, open the renamed contact workspace.
3. Remove the SLA field, which is the unsupported SLA Container relationship item.
4. Configure buttons in the quick actions area, by clicking Configure Quick Access Buttons in the ribbon designer. Supported buttons are Copy, Delete, New, Reset Password, and Print. (Refresh, Save, and Save and Close buttons always appear in the consistent area to the left of the Actions menu.)
5. Configure buttons on the Actions menu in the ribbon designer. Supported buttons are Copy, Delete, New, Reset Password, and Print. (Refresh, Save, and Save and Close buttons always appear in the consistent area to the left of the Actions menu.)
6. Click the Save and Close button.

Customize the standard task workspace for Agent Browser UI

Use the workspace editor in the Oracle Service Cloud Smart client to customize a task workspace suitable for Agent Browser UI.

Steps

1. From the workspaces explorer, copy the standard task workspace and rename it.
2. From the workspaces explorer, open the renamed task workspace.
3. Configure buttons in the quick actions area, by clicking Configure Quick Access Buttons in the ribbon designer. Supported buttons are Complete, Copy, Delete, and New. (Refresh, Save, and Save and Close buttons always appear in the consistent area to the left of the Actions menu.)
4. Configure buttons on the Actions menu in the ribbon designer. Supported buttons are Complete, Copy, Delete, and New. (Refresh, Save, and Save and Close buttons always appear in the consistent area to the left of the Actions menu.)
5. Click the Save and Close button.

Assigning Agent Browser UI workspaces

Workspaces define which fields, controls, and tabs are available when working with records in Oracle Service Cloud and how the information is organized on the content pane. You use the Service Console of the smart client to define workspaces and associate them with staff profiles. There are browser-specific workspace slots, including Incident Browser, Contact Browser, Organization Browser, and Task Browser, used to define the record editors for Agent Browser UI.

Your organization may use the default standard desktop console workspaces for the supported workspace types in Agent Browser UI, or you may create one or more customized workspaces. Your staff profiles define the workspaces your staff members see when they work in Agent Browser UI, whether it is the default workspace or a customized workspace.
Assign custom workspaces to a profile

Steps

1. Click the **Configuration** button on the navigation pane.
2. Double-click **Profiles** under **Staff Management**.
   The report opens on the content pane.
3. Double-click the profile you want to edit.
   The **Profile Editor** opens.
4. Click the **Interfaces** button on the ribbon.
   The **Interfaces** page opens.
5. Click the **Search** button next to the browser-specific workspace you want to change.
   The **Workspaces** window opens.
6. Select the workspace you want to use.
7. Click the **OK** button to close the selection window.
8. Repeat the previous two steps for each workspace you want to assign.

   **Note:** If you do not assign a workspace to a browser editor slot, the workspace from the non-browser editor slot will be used. If the non-browser editor slot is blank or contains a workflow, the standard desktop console workspace will be used.
9. Click the **Save and Close** button on the ribbon.
Workspace rules for Agent Browser UI

Use workspace rules to extend the functionality of your custom workspaces and help reduce the time staff members spend performing routine tasks. Workspace rules are used to dynamically change the display, behavior, and values of fields and controls on a workspace, and are triggered by staff member actions, events, and conditions.

Note: Workspace rules are supported for incident, contact, organization, and custom object workspaces in Agent Browser UI. Not all available workspace rule triggers, conditions, and actions are supported by Agent Browser UI.

You will use the Service Console of the smart client to manage workspace rules.
5 Key Features Supported in the Agent Browser UI

Notifications
A notification is a message that notifies appropriate staff members of certain events within Service Cloud. Notifications are supported by Agent Browser UI for the following events.

- A broadcast notification is sent to you from another staff member.
- An incident or task is assigned to you.
- An incident or task that was assigned to you has been reassigned to another staff member.
- An incident or task has been escalated.
- An incident is updated, closed, or reopened.
- A system error has occurred.

View and manage your notifications
You can view a list of your notifications, then view details of or take appropriate action on the notifications in the list.

Steps
1. Click the Notifications icon in the global header region.

Each of your notifications in the list contains the following information.

- **Unread Indicator**—A blue dot indicates you have not read a broadcast or system error notification or have not acted on an incident- or task-related notification. The subject will also appear in bold font.
Key Features Supported in the Agent Browser UI

1. **Type**—The icon associated with the notification type. The icon will indicate a type of incident record, task record, broadcast notification, or system error.

2. **Who**—Who sent the notification.

3. **Event**—The event that triggered the notification.

4. **Subject**—The notification subject.

5. **Timestamp**—Date and time the notification was sent.

2. To view the complete message details, click on any broadcast or system notification.

   ✉️ **Note:** When you click on an incident or task notification, the corresponding record will open so that you can take suitable action.

3. To delete a single notification, click the **Delete** symbol to the right of the notification.

4. To delete all notifications in the list, click the **Delete All** button.

5. To refresh the list of notification, click the **Refresh** button.

**Related Topics**

- Send a broadcast notification

**Send a broadcast notification**

You can send notifications to other staff members, and can select the recipients manually or send a notification to all logged-in staff members.

**Prerequisites**

Your profile must give you permission to send broadcast notifications.

**Steps**

1. Click the **Notifications** icon in the global header region.

   The **Notifications** window opens.

2. Click the **Create** button.

   ✉️ **Note:** The **Create** button is enabled only when your profile has permission to send notifications.

   A panel opens where you can create your notification message.

3. To send a notification to selected staff members
   a. Click the **Search** icon to the right of the **To** field.

      The **Add Recipients** window is displayed.

   b. Select the check box to the left of one or more names from the list.

      ✉️ **Note:** Find recipient names in the **Add Recipients** window by scrolling through the list or begin typing a name into the search box. You can also select all names from the list by selecting the check box to the left of the **Name** column heading.

   c. Click **OK**.
The selected names appear in the To field.

4. To send the notification to all staff members who are logged in, select the **Send to all logged in users** check box.

> **Note:** When the **Send to all logged in users** check box is selected, the To field is disabled. Any recipient names already in the To field will still appear, but you cannot make any changes until you clear the **Send to all logged in users** check box.

5. Type your message in the **Message** field.

6. Click the **Send** button.

**Related Topics**

- View and manage your notifications

---

**Change your password**

Your organization may have security policies in place that require all staff to use a password to log in to Oracle Service Cloud. You may be required to change your password at regular intervals or you may choose to change your password at any time.

**Important:** If your profile contains the SSO Login (SAML 2.0) permission for single sign-on, you cannot change your password in Oracle Service Cloud.

**Steps**

1. Click your user name in the global header region.
   
   The **Settings and Actions** menu opens.

2. Click **Change Password**.

3. Type your current password and press **Tab**.

   > **Note:** Don’t forget that your password is case sensitive.

4. Type the new password and press **Tab**.

   If an entry does not meet your organization’s password requirements, such as password length or character repetition, the system highlights the incorrect entry.

5. Retype your new password.

6. Click **OK**.

**Result**

The server verifies your password history (both current and new passwords) and, if errors are found, displays the requirements that were not met.
Sending incident responses

You send your reply to the customer after you have completed a response to an incident.

In Agent Browser UI, the thread control on the incident workspace appears differently than in the Smart Client interface. In particular, you can use the Done button to move a new message from the editor to the message list in draft mode (for Response) or not yet saved mode (for Customer Entry or Note). Until you take further action, the draft response and unsaved threads will be highlighted with color and will have edit and delete controls in the thread entry.

You can also include an existing knowledge article in an email response to an incident. Customers receive the link to the article, which is available to them on the customer portal.

**Note:** If you want staff members to be able to send incident responses, you will need to assign incident Add/Edit and Send Response permissions in their profile Service permissions for record types.

**Related Topics**

- Set up the send incident response function
- Send an incident response

Set up the send incident response function

**Steps**

1. On the Smart Client desktop interface, open the incident browser workspace.
2. Verify the Rich Text Incident Thread relationship item is added to the incident workspace.
3. Use the **Response Options** drop-down menu in the **Design** tab to select options for the Rich Text Incident Thread control.
4. Use the **Read Only** behavior property in the **Design** tab to select an option for the Rich Text Incident Thread control.
   - Read Only on New
   - Read Only on Edit
   - Read Only/Profile Based
5. Use the **Default Thread** drop-down menu in the **Design** tab to define the default thread type for new and edited incidents.
6. Click the **Ribbon** button in the **Home** tab to open the ribbon designer and configure the Send button on the Actions menu or in the quick actions area on the incident workspace.
7. Click the **Save and Close** button.

**Related Topics**

- Send an incident response
Send an incident response

Steps

1. On the Messages tab of an open incident, click the Compose Response drop-down and select the response channel.

2. To addCc recipients, click in the Cc field and enter one or more email addresses. Type email addresses directly into the field or click the Search button to use the Select Names window.

   \(\text{Note:}\) All recipients are able to see the email addresses in the Cc field.

3. To add Bcc recipients, click in the Bcc field and enter one or more email addresses. Type email addresses directly into the field, or click the Search button to use the Select Names window.

   \(\text{Note:}\) No recipients are able to see the email addresses in the Bcc field.

4. Type your response in the message field.

5. To add an attachment to the response, click the Attachment button (paper clip). A window displays any existing incident attachments.

   a. To attach any incident attachment, select the check box to the left of the filename. Incident attachments attached to the response will display at the bottom of the message field.

   b. To attach a new file to the response, click Add New File, then click Browse to navigate to and select the desired file. New files attached to the response will display at the bottom of the message field.

   c. To attach additional files to the response, repeat the substep above.

   \(\text{Note:}\) Attachments can be added only to email responses. The maximum file size for each attachment is 20MB.

6. To include a knowledge article in an incident response refer to Managing and using the knowledge base.

7. To save the response in draft mode, do one of the following:

   - To move the response to the message list without saving the record, click the Done button on the Messages tab.

   - To move the response to the message list and save the record, click the Save button above the incident tabs.

8. To delete a response in draft mode, click the Delete button (X) to the right of the message.

9. To edit a response in draft mode, click the Edit button (pencil) to the right of the message.

10. To send the draft response message, select the message then click Send on the Actions menu drop-down list or quick actions area. The message is sent to the recipient, and any attachments are saved with the incident and are listed on the Attachments tab.

11. Click the Save and Close button.

Related Topics

- Set up the send incident response function
View incident response attachments
You can easily view attachments that have been sent with each incident response from an open incident record.

Steps

1. Open an incident.
2. Click the attachment icon on a response thread header.

   ✍ Note: The attachment icon does not appear on a response thread header when no attachments were included.

   A list of attachments sent with that response is displayed.
3. Click on an attachment in the list to view the attachment.
   The attachment opens in a separate window.
4. Close the window when you have finished viewing the file.

Viewing and responding to social incidents
Using powerful features of Oracle RightNow Social Experience (Social Experience), you can view and respond to social incidents when using Agent Browser UI.

Agents can monitor and participate in conversations on the social web from the Agent Browser UI.

- View and drill down into social cloud search results, using reports specifically for Agent Browser UI—Social Monitor Search Results and Social Monitor New Results in Public Reports/Common/Social Monitor/Browser.
- Create incidents from social cloud results using the Create Incident button.

   ✍ Note: When a social incident is created using Agent Browser UI, if an existing contact exists and is associated to the social media user tied to the cloud result, that contact will be used in the incident. Otherwise, a new contact is created.

- Respond to incidents that have been created from Facebook subscriptions and private messages and Twitter public posts and @mentions.
- Monitor and respond to customer responses on existing incidents.

Agents use social response mechanisms integrated in the Messages tab on the incident workspace to respond to social incidents.

For more information on Social Experience, refer to the Social Experience section of your Oracle Service Cloud online help.
Forwarding incidents

An incident forwarding function is available when working with an incident record. For example, you may need additional information from another staff member before responding to a customer.

To forward an incident, you complete fields in an email template. Information is automatically taken from the incident record and included with the email message when it is sent.

Related Topics

- Forward an incident

Forward an incident

When you forward an incident record, you can forward any files attached to the record, send other files, add comments, and include a bookmark link.

Prerequisites

To use the forward incident function, verify the Forward button is included on the browser incident workspace Action menu or Quick Action area using the workspace designer on the Service Console of the .NET-based desktop interface.

Steps

1. Click the Actions drop-down menu and select Forward.

   ![Forward Incident Panel]

   Note: If there are existing incident attachments, they will be listed under Attachment(s) in the Comments section.

2. Enter one or more recipient email addresses in the To field. Type email addresses or contact names directly into the field, or click the Search button to the right of the field to use the Select Names window.
Tip: Use the contact match function when typing directly into the To field. Type part of the contact name, then enter the recipient separator (;) or navigate to the next field. If there is a matching record, it will be populated into the To field. If there is more than one matching record you will be able to select from the matching records.

3. To add Cc recipients, click on Cc and enter one or more email addresses. Type email addresses directly into the field, or click the Search button to the right of the field to use the Select Names window.

Note: All recipients are able to see the email addresses in the Cc field.

4. To add Bcc recipients, click on Bcc and enter one or more email addresses. Type email addresses directly into the field, or click the Search button to the right of the field to use the Select Names window.

Note: No recipients are able to see the email addresses in the Bcc field.

5. Edit the Subject field, if needed.

6. Type the message you want to include with the record in the Comments field.

7. To include a bookmark to the incident in the Comments field, click the Bookmark button at the bottom of the window.

Tip: Including the bookmark to the incident in the Comments field allows the recipient to quickly navigate to the incident.

8. To set Exclude Notes and Send Contact Information options, click the Options drop-down menu.

Note: The Exclude Notes option check box is cleared by default, so private notes in the incident message thread are included in the forwarded incident information. To prevent private notes from being forwarded with the incident, select the Exclude Notes check box.

The Send Contacts option check box is cleared by default, so contacts associated with the incident are not included in the forwarded incident information. To include the contacts associated with the incident, select the Send Contacts check box.

9. To add or remove existing attachments or add a new file to the forwarded incident, click the file attachment button to the right of the Options drop-down menu and do one or more of the following:

- To remove an existing incident attachment from the forwarded incident, clear the check box to the left of the file name.
- To add an existing incident attachment to the forwarded incident, select the check box to the left of the file name.
- To add a new file to the forwarded incident, click Add New File, then browse to and select the file.

10. Click the Send button.

Related Topics

- Bookmarks
- Create a bookmark URL
Inserting standard text

Using standard text in incident responses saves time, eliminates errors, and helps staff members respond to customers with consistent information.

Once your administrator has added standard text using the .NET-based desktop interface, you can insert standard text using the Standard Text tool panel or, if you know the hot key sequence for the text item, you can type it without opening the Standard Text window.

Related Topics

- Insert standard text from the Standard Text tools panel
- Insert standard text using a hot key sequence

Insert standard text from the Standard Text tools panel

Use standard text in your responses as an alternative to repeatedly typing often-used information.

Prerequisites

Standard text must be added by an administrator using the .NET-based desktop interface.

Steps

1. In your incident response, position the cursor where you want to insert the standard text.
2. Click the Standard Text button on the upper right of the incident workspace to open the Standard Text tools panel.

3. Click the drop-down menu under the Standard Text heading to view the titles of the configured standard text items in a hierarchical view. To narrow the list of items displayed, begin typing the item name in the search box.

   Tip: Hover over a standard text item to view details about the item.

4. Click on an item to display it in the Preview field.
Chapter 5

Key Features Supported in the Agent Browser UI

5. Click Add to Message to insert the standard text into your response.
6. To add other standard text items to the response, repeat the steps above.
7. To modify the standard text, edit it as necessary in the response.

Note: If the standard text includes one or more variables, the variable is displayed in your response rather than the value of the variable. The variable is replaced with the data only when you send your response. Then, when you reopen the incident, the data appears where the variable had been inserted.

8. Click the Standard Text button to close the Standard Text tools panel.

Related Topics

- Inserting standard text
- Insert standard text using a hot key sequence

Insert standard text using a hot key sequence

Use the hot key sequence for a standard text item to insert often-used information into your incident response most efficiently.

Steps

1. In your incident response, position the cursor where you want to insert the standard text.
3. Type the hot key sequence in the Standard Text field.

Tip: To display the hot key sequence for a standard text item, open the Standard Text tools panel and select the standard text item from the drop-down menu. The keystrokes are displayed in the Hot Key field.

4. Press F8 again to insert the standard text in your response.
5. To add other standard text items to the response, repeat the steps above.
6. To modify the standard text, edit it as necessary in the response.

Note: If the standard text includes one or more variables, the variable is displayed in your response rather than the value of the variable. The variable is replaced with the data only when you send your response. Then, when you reopen the incident, the data appears where the variable had been inserted.

Related Topics

- Inserting standard text
- Insert standard text from the Standard Text tools panel
Attaching files to records

Using the **Attachments** tab, you can attach files to contact, incident, organization, and task records. The **Attachments** tab lets you add files containing information that may not fit neatly into a record. For example, you might want to attach a file that contains graphic elements to an incident.

The **Attachments** tab contains an attachments report, which is a list of all files attached to the record. For each attached file, the report contains the file name, file size, date and time the file was created, date and time the file was updated, and description, as well as links for downloading and deleting the attachment. A file visibility (Private column) appears only for incidents.

The Attachments tab contains a toolbar for working with attachments associated with a record. The following table describes the buttons on the toolbar of the **Attachments** tab.

**Table 2: Attachments Tab Toolbar Description**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Upload</strong></td>
<td>Click this button to browse for a file and attach it.</td>
</tr>
<tr>
<td><strong>Download</strong></td>
<td>Click this button to download the file attachment and open the file or save it to the location you specify on your workstation.</td>
</tr>
<tr>
<td><strong>Properties</strong></td>
<td>Click this button to view or edit the properties of a file attachment.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Click this button to remove the selected file attachment from the record.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Attach files to a record
- View and edit attachment properties

**Attach files to a record**

Attach one or more files to a record in the **Attachments** tab.

**Steps**

1. Click the **Attachments** tab.
2. Click the **Upload** button.
   - The **Upload Attachment** window opens.
3. Click **Browse**.
   - A window opens and displays the files and folders on your workstation.
4. Double click on the file to attach.
   - The file pathname is displayed in the **File Name** field.
5. Enter the following field information.
Table 3: Upload Attachment Window Fields Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Type the name you want the file to display as on the Customer Portal. If this field is left blank, the file name will display.</td>
</tr>
<tr>
<td>Description</td>
<td>Type a description of the file to provide more information about it.</td>
</tr>
<tr>
<td>Private</td>
<td>Select this check box to make the attachment private.</td>
</tr>
</tbody>
</table>

The **Private** check box appears only for files that are attached to incidents. Customers do not see private attachments on the customer portal.

6. Click OK.
7. Repeat the steps above for each file you want to attach to the record.

**Related Topics**

- Attaching files to records
- View and edit attachment properties

View and edit attachment properties

You can view properties for file attachments and add file information.

**Steps**

1. Select a file attachment from the list and click the **Properties** button on the **Attachments** tab toolbar.
2. Enter the following field information.

Table 4: Attachment Properties Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*File Name</td>
<td>This field displays the file name. You can change the name of the file.</td>
</tr>
<tr>
<td>Display Name</td>
<td>Type the name you want the file to display as on the Customer Portal.</td>
</tr>
<tr>
<td>Description</td>
<td>Type a description of the file to provide more information about it.</td>
</tr>
<tr>
<td>Private</td>
<td>Select this check box to make the attachment private.</td>
</tr>
</tbody>
</table>

The **Private** check box appears only for files that are attached to incidents. Customers do not see private attachments on the customer portal.

3. Click the **OK** button to close the **Attachment Properties** window.
Copy a record

You can copy a record from a report or an open record to use as a starting point for creating another record.

Prerequisites

Steps

1. Do one of the following:
   - With a report open on the content pane, click the record you want to copy and click the Copy button on the toolbar.
   - With the record open, click the Actions drop-down menu, then select Copy.

   The Copy window opens.

2. Select the check box for each of the data items you want copied with the record. The following table shows the available options for each type of record.

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Copy Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Notes</td>
</tr>
<tr>
<td></td>
<td>Contact Lists</td>
</tr>
<tr>
<td></td>
<td>File Attachments</td>
</tr>
<tr>
<td>Incident</td>
<td>Threads</td>
</tr>
<tr>
<td></td>
<td>Incident Contacts</td>
</tr>
<tr>
<td></td>
<td>File Attachments</td>
</tr>
<tr>
<td></td>
<td>When copying an incident, the original reference number is prepended to the incident subject of the copied incident for identification purposes.</td>
</tr>
<tr>
<td></td>
<td>When copying an incident that is associated with a social channel, the thread type is automatically set to Email.</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization Addresses</td>
</tr>
<tr>
<td></td>
<td>Notes</td>
</tr>
<tr>
<td></td>
<td>File Attachments</td>
</tr>
</tbody>
</table>
Oracle Service Cloud
Agent Browser User Interface Guide

Chapter 5
Key Features Supported in the Agent Browser UI

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Copy Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>Notes</td>
</tr>
<tr>
<td>File Attachments</td>
<td></td>
</tr>
</tbody>
</table>

3. Edit the copied record as necessary.

*Tip:* You can edit response threads in a copied incident record.

4. Click the **Save and Close** button on the toolbar to save your edits to the copied record.

---

**Bookmarks**

The Bookmark function gives staff members the ability to create a bookmark to a record or report, then share it with others who can use it to quickly navigate directly to that record or report.

When a user clicks on the bookmark URL for a record or report that has been shared with them, they will be taken directly to that record or report. If the user is not already logged in to Oracle Service Cloud using Agent Browser UI, the login screen will appear first.

*Note:* Report variables and filters are not included in the bookmark URL.

**Related Topics**

- Create a bookmark URL
- Forward an incident

---

**Create a bookmark URL**

Create a bookmark from an open record or report that others can use to quickly locate that record or report.

**Steps**

1. Open the record or report that you want to create a bookmark for.

*Note:*

   If a record has been created but not saved, the **Bookmark** action is not displayed.

2. Do one of the following:
   - On a record, click the **Actions** drop-down menu and select **Bookmark**.
   - On a report, click the **Bookmark** button on the taskbar.

   A pop-up message will display the bookmark.

3. Select and copy the bookmark URL.

4. Close the pop-up.
5. Paste the copied bookmark URL into an email or other communication channel or use it when forwarding an incident.

Related Topics

- Bookmarks
- Forward an incident

Managing and using the knowledge base

The knowledge base in Oracle Service Cloud contains information that provides solutions to common customer support questions.

The standard knowledge base embedded in Oracle Service Cloud is knowledge foundation (often referred to as Answers).

Oracle Knowledge Advanced (Knowledge Advanced), which provides more powerful and intelligent contextual search capabilities can be integrated with Oracle Service Cloud.

Related Topics

- Using Knowledge Foundation
- Search the knowledge base
- Using Knowledge Advanced

Using Knowledge Foundation

Staff members can search the knowledge base based on the context of the incident, perform an adhoc search, and filter knowledge search results.

The knowledge base search function, accessible using the Search Knowledge Base tool panel tab in the tools area on the incident workspace, allows staff members to view details of the set of answers within a single window and add an answer to the incident as a link or text.

Related Topics

- Managing and using the knowledge base
- Search the knowledge base
- Using Knowledge Advanced

Search the knowledge base

Find information in the knowledge base to support common customer support questions.

Steps

1. Open the incident which needs an answer.
2. Click the **Search Knowledge Base** tool panel tab in the tools area on the incident workspace. The tools panel opens showing a set of answers (search results) based on the context of the incident subject.

3. To customize the search, do any of the following.
   - Change the text in the search text field, then click the **Search** icon to the right of the search text field.
   - Select a different text field search option—supported options are Phrase, Exact Search, and Complex Expression, then click the **Search** icon to the right of the search text field.

4. To filter the results, click the arrow to the left of **Filters** to expand the **Filters** section and enter or select appropriate filter values.

5. Click on an answer in the set of answer results in the search panel. A separate window displays the answer detail.

6. To browse other answers, click on an answer in the set of answer results in the search panel.

7. Close the answer detail display window.

8. To add an answer to the active message thread, click the **Add as Link** button or **Add as Text** button to the right of the desired answer in the results section on the search panel.

   ✍️ **Note:** If there is no active message thread, the **Add as Link** and **Add as Text** buttons are grayed out and the functions are not available.

9. Click the **Search Knowledge Base** tool panel tab to collapse the tools panel.
• Managing and using the knowledge base
• Using Knowledge Foundation
• Using Knowledge Advanced

Using Knowledge Advanced

Knowledge Advanced provides more powerful knowledge management capabilities when using Agent Browser UI.

When Knowledge Advanced is enabled and configured in Oracle Service Cloud, you will have access to many advanced knowledge management features using Agent Browser UI. Use the Recommended Articles, Search Knowledge Base, Linked Knowledge Base Articles, and My Favorite Knowledge Base tool panel tabs on the right side of the incident workspace to access these functions:

• View a list of recommended knowledge articles based on the context of the incident subject or products and categories.
• Perform searches of the knowledge base.
• Add an article to an incident as a link or text, using hot keys or buttons on the My Favorites tab or Search Knowledge Base tab.
• Save and remove articles from a list of favorites.
• View a list of all articles linked to an incident.
• Choose one or more languages for viewing search results.
• Create, modify, and curate knowledge articles.

Knowledge Advanced also allows you to track events such as answers viewed and answers added to incidents and view event tracking reports on the Smart Client.

For detailed information on configuring and using Knowledge Advanced refer to the Oracle Knowledge Advanced Configuration Guide and the Oracle Knowledge Advanced User Guide at Answer ID 8156.

Chat with customers

If your profile is configured to use the chat function, you can chat with customers from the Agent Browser UI.

To receive chat requests, you must first log in to chat and set your status as Available or anything equivalent. The following options are available.

• View a new chat request notification and accept or decline it.
• View notifications for new chat messages in an existing chat window.
• Conference another agent to a chat.
• Chat with multiple customers simultaneously and view information on chats that are not in focus.
• Terminate or wrap up a chat.
• Transfer a chat to a different agent or queue.

Refer to the documentation on Chat in the Oracle Service Cloud online help.

Co-browsing with customers

Co-browse allows an agent to view a customer’s screen, making it an important tool to assist with customer support and sales conversion.

While speaking to a customer by phone, staff members can initiate co-browse to take control of the customer’s web browser and guide the customer to complete a task.

Before staff members can begin initiating co-browse sessions with customers, you must configure the incident browser workspace and provide profile permissions.

Note: Co-browse in the Agent Browser UI is supported only for the case when an agent is speaking with a customer by phone.

Collaborating with other agents

As in the Smart Client, agents using the Agent Browser UI can collaborate with others to help resolve customer issues. Refer to the Collaborating with other agents section of the Oracle Service Cloud online help.

Printing Records and Reports

You can easily print details of records and reports using the Print button on toolbars and the Action menu.

You can print the details of contacts, organizations, tasks, and incidents from the Print button on the Action drop-down menu or the Quick Access Toolbar. You can also print a report from the Print button on the report toolbar.

In an open incident, the Print button is available on the Contacts tab, the Action drop-down menu, and the Quick Access Toolbar. If you click the Print button on the Contacts tab, only the contact details are printed. However, if you click the Print button on the Actions menu or on the Quick Access toolbar, complete details of the incident are printed.
Notes

The Notes relationship item is available on contact, organization, task, and custom object workspaces, allowing staff to keep track of comments, reminders, and details which can be viewed, edited, or deleted later.

This is the Notes tab, shown on a contact workspace.

![Notes tab](image)

To use the notes function on the browser contact, organization, task, or custom object workspaces, verify the Notes relationship item is included on the workspace using the workspace designer on the Service Console of the .NET-based desktop interface.

*Note:* If you want staff members to be able to edit or delete existing notes, you will need to assign Edit/Delete Notes permission in their profile for the appropriate record types.

Audit log

The Audit Log relationship item is available on incident, contact, organization, task, and custom object workspaces. This function automatically records the history of actions that take place on the record over time. The Audit Log tab on an incident workspace appears below.

![Audit Log tab](image)

To use the audit log function on the browser incident, contact, organization, task, or custom object workspaces, verify the Audit Log relationship item is included on the workspace using the workspace designer on the Service Console of the .NET-based desktop interface.
Reset contact password

Staff members can initiate resetting a contact's password while working on a contact record.

Prerequisites

Verify the **Reset Contact Password** button is included on the browser contact workspace ribbon or Quick Access Toolbar using the workspace designer on the Service Console of the .NET-based desktop interface.

Steps

1. Open the contact record you want to reset the password for.
2. Click the **Actions** drop-down menu, then select **Reset Password**.
3. Click **Yes** to confirm you want to reset the contact's password.

Result

Once the password reset is initiated, the contact’s previous password becomes invalid and an email is sent to the contact’s primary email address with steps for completing the password reset.

Survey by proxy

The Survey by Proxy workspace control is now supported in the Agent Browser UI. Adding the control to a contact, organization, or incident workspace allows your agents to complete surveys on behalf of a customer.
6 Using Reports in Agent Browser UI

Using reports on Agent Browser UI

The Agent Browser UI’s reports let your staff members access the incidents, contacts, organizations, and other record types they need to effectively help your customers. Reports are accessed by clicking the Navigation icon located at the top left corner of Agent Browser UI. You add reports to the Navigator region from the .NET agent desktop Navigation Sets editor.

After selecting a report, you can select search options configured for the report. After selecting your search options and clicking the Search button, the report opens on Agent Browser UI. An example of a contacts report is shown here.
Using the options shown at the top of the report, highlighted in the image above, you can perform many of the same functions available when viewing the report on the .NET-based agent desktop interface. These options are described in the following table.

Table 6: Agent Browser UI Report Header Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Click this button to select display options for the report. The following options are available.</td>
</tr>
<tr>
<td></td>
<td><strong>Columns</strong>—Select this option to hide columns or display columns that have previously been hidden.</td>
</tr>
<tr>
<td></td>
<td><strong>Sort</strong>—Select this option to sort the report’s data by the column you select. You can also hover over a column’s header and click the up arrow or down arrow to sort by the column’s data.</td>
</tr>
<tr>
<td></td>
<td><strong>Reorder Columns</strong>—Select this option to open a window where you can reorder the report’s columns.</td>
</tr>
<tr>
<td>New</td>
<td>Click this button to add a new record. The type of record you add depends on the report’s primary record type. For example, clicking this button on a contacts report will open the New Contact window.</td>
</tr>
<tr>
<td>Open</td>
<td>Click this button to open the record selected on the report. You can also double-click records to open them.</td>
</tr>
<tr>
<td></td>
<td>The option to select multiple rows in a report is not currently available on Agent Browser UI.</td>
</tr>
<tr>
<td>Copy</td>
<td>Click this button to copy the record selected on the report.</td>
</tr>
<tr>
<td>Delete</td>
<td>Click this button to delete the record selected on the report.</td>
</tr>
<tr>
<td>Search</td>
<td>Click this button to open the Search window, where you can select new search options for the report, including filters, variables, and paging options.</td>
</tr>
<tr>
<td></td>
<td>Reports on Agent Browser UI currently can display up to 100 rows per page.</td>
</tr>
<tr>
<td>Bookmark</td>
<td>Click this button to open a window displaying the report’s URL. You can copy the URL to send to others or to yourself. When using the URL, the report’s Search window opens where different search criteria can be selected. When the report opens, it displays current data from the database.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Click this button to refresh the report’s data.</td>
</tr>
</tbody>
</table>
Supported report features

While Agent Browser UI supports many of the standard reporting options available in the .NET-based agent desktop interface, some options have not yet been added. Additional features will be added in future releases until the same report options are available regardless of which interface you access reports from. To effectively access data from Agent Browser UI, you should understand which features are currently supported.

ℹ️ Important: Since many of the reports available in the Analytics explorer use features that are not yet supported on Agent Browser UI, we recommend creating reports specifically for use on Agent Browser UI. If a report currently exists that you want to use on the interface, you can copy it and remove any unsupported report options from the copy.

The following reporting features are currently supported on Agent Browser UI.

- Quick Search reports
- Report variables
- Dashboard features are supported except minimizing, maximizing, and hiding dashboard reports.
- All chart types are supported except 3D Funnel, 2D and 3D Pyramid (a Funnel chart sub-type), and 2D and 3D Stacked Line/Bar Combo.
- Data exceptions are supported. However, they cannot currently interact with chart displays.
- Column format options that change how data in a column displays are supported. For example, if your report is configured to display data in a numeric column as percentages, this is shown on Agent Browser UI.
- Column calculations are supported. For example, a column formatted to include the Total calculation will display the total of the data in a numeric column on Agent Browser UI.

Unsupported features

There are several features that are commonly used in reports on the .NET-based agent desktop are not yet available in Agent Browser UI. These include rollups, cross-tabs, slicing, and in-line editing. These and other features will be added in future releases, with the timeline determined in part by customer usage statistics.

Reports and record types

The Agent Browser UI does not currently support all Oracle Service Cloud record types. Reports that attempt to output unsupported record types may not function correctly, and you will not be able to open unsupported record types shown in the reports. The following record types are currently supported.

- Contacts
- Custom Objects
- Incidents
- Organizations
Tasks

Each report on Agent Browser UI supports only a single record type. For example, when using a report displaying incidents on the .NET-based agent desktop interface, you can open the incident record, along with the related contact and organization records. In Agent Browser UI, you can open only the incident.

If you want to open records from a report that displays information from multiple record types, you should ensure that the report’s record commands are configured to let you access the record type you want. To do so, open the report on the report designer, click the Records button on the ribbon’s Home tab, and clear the check boxes next to the record types except for the record type you want to be able to open from the report.