# Contents

<table>
<thead>
<tr>
<th>Preface</th>
<th>i</th>
</tr>
</thead>
</table>

## 1 Getting Started

<table>
<thead>
<tr>
<th>Getting Started</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>About this guide</td>
<td>1</td>
</tr>
<tr>
<td>Agent Browser User Interface</td>
<td>1</td>
</tr>
<tr>
<td>Logging in to the Agent Browser User Interface</td>
<td>1</td>
</tr>
<tr>
<td>Understanding the Agent Browser User Interface console</td>
<td>2</td>
</tr>
<tr>
<td>Notifications</td>
<td>3</td>
</tr>
</tbody>
</table>

## 2 Using Common Functionality

<table>
<thead>
<tr>
<th>Using Common Functionality</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Searching for records</td>
<td>5</td>
</tr>
<tr>
<td>Searching from open records</td>
<td>5</td>
</tr>
<tr>
<td>Forward a record</td>
<td>5</td>
</tr>
<tr>
<td>Copy a record</td>
<td>7</td>
</tr>
<tr>
<td>Select a recipient</td>
<td>8</td>
</tr>
<tr>
<td>Creating and using workgroups</td>
<td>9</td>
</tr>
<tr>
<td>Audit log</td>
<td>10</td>
</tr>
<tr>
<td>Notes</td>
<td>10</td>
</tr>
<tr>
<td>Bookmarks</td>
<td>10</td>
</tr>
<tr>
<td>Create a bookmark URL</td>
<td>11</td>
</tr>
</tbody>
</table>

## 3 Working with Reports

<table>
<thead>
<tr>
<th>Working with Reports</th>
<th>12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using reports</td>
<td>12</td>
</tr>
</tbody>
</table>

## 4 Working with Organizations

<table>
<thead>
<tr>
<th>Working with Organizations</th>
<th>16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizations overview</td>
<td>16</td>
</tr>
<tr>
<td>Standard organization workspace</td>
<td>16</td>
</tr>
<tr>
<td>Organization workspace toolbar</td>
<td>17</td>
</tr>
<tr>
<td>Organization record tabs</td>
<td>18</td>
</tr>
<tr>
<td>Add an organization</td>
<td>18</td>
</tr>
<tr>
<td>Organization workspace fields</td>
<td>19</td>
</tr>
</tbody>
</table>
Edit an organization 20
Delete an organization 20
Remove contacts from an organization 21

5 Working with Contacts 22
About Contacts 22
Contacts overview 22
Deleting contacts 23
Standard contact workspace 23
Contact workspace toolbar 23
Contact record tabs 24
Add a contact 25
Contact workspace fields 25
Adding contacts from other records 27
Remove a contact from a record 27
Edit a contact 28
Delete a contact 28

6 Working with Tasks 29
Tasks: overview 29
Standard task workspace 29
Task workspace toolbar 29
Task record tabs 30
Add a task 30
Task workspace fields 31
Complete a task 32
Edit a task 32
Delete a task 33

7 Working with Incidents 34
Incidents overview 34
Standard incident workspace 34
Incident toolbar 34
Record tabs 36
Fill your inbox 36
Editing incidents 37
Incident statuses 37
Edit key incident fields 38
Sending responses 39
Send an incident response 39
View incident response attachments 41
Forwarding incidents 41
Forward an incident 41
Inserting standard text 43
Insert standard text from the Standard Text tools panel 43
Insert standard text using a hot key sequence 44
Search the knowledge base 44
Delete an incident 45
Reassign or re-queue an incident 45

8 Using Knowledge Advanced in the Agent Browser User Interface 46
About Knowledge Advanced in the Agent Browser User Interface 46
About recommended articles 46
Searching the knowledge base 47
About linking articles 47
About Favorites 47

9 Working with Answers 48
About Answers 48

10 Chatting with a Customer 66
Chat for agents 66
Chat Live Media bar 66
Log in to Chat 67
Engagement panel 67
Interaction workspace 68
Chat with a customer 68
View incidents submitted by a customer 68
Open a contact record 69
Transfer a chat to another agent 69
Conference another agent into your chat 70
Wrap-up and terminate a chat session 70
Chat for customers 71
Chat with an agent 72
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td><strong>Co-browsing with a Customer</strong></td>
<td>73</td>
</tr>
<tr>
<td></td>
<td>Co-browse with a customer from an incident workspace</td>
<td>73</td>
</tr>
<tr>
<td>12</td>
<td><strong>Using Service Collaboration</strong></td>
<td>75</td>
</tr>
<tr>
<td></td>
<td>Collaborating with other agents</td>
<td>75</td>
</tr>
<tr>
<td>13</td>
<td><strong>Monitoring Social Channels</strong></td>
<td>76</td>
</tr>
<tr>
<td></td>
<td>Social Monitor Overview</td>
<td>76</td>
</tr>
<tr>
<td></td>
<td>Viewing and responding to social incidents</td>
<td>76</td>
</tr>
<tr>
<td></td>
<td>Create an incident from a social cloud result</td>
<td>77</td>
</tr>
<tr>
<td></td>
<td>Responding through social channels</td>
<td>77</td>
</tr>
<tr>
<td></td>
<td>Respond with a Facebook or Twitter post</td>
<td>78</td>
</tr>
<tr>
<td></td>
<td><strong>Glossary</strong></td>
<td>79</td>
</tr>
</tbody>
</table>
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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If you find an error or want to suggest enhancements to our documentation, please take one of the following surveys:


Thank you for helping us improve our documentation.
1 Getting Started

About this guide

This guide covers using the Agent Browser User Interface (Agent Browser UI).
Refer to Administering Agent Browser User Interface for administering the Agent Browser UI.

Agent Browser User Interface

You can access Oracle Service Cloud through the Agent Browser User Interface (Agent Browser UI)—a browser-based user interface. In addition to the Service Console and the Mobile Agent App, the Agent Browser UI gives you one more way to view and manage your Oracle Service Cloud data.
Agent Browser UI lets you:

- Access Oracle Service Cloud from anywhere.
- Access Oracle Service Cloud using devices that do not support Microsoft®.NET.
- Use environments where browser-based applications are required; for example, when required by an organization's compliance or governance rules.

Logging in to the Agent Browser User Interface

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

Prerequisites

You need to know your user name and password. If you have previously logged in to the Oracle Service Cloud Service Console, then use those same credentials. Otherwise, contact your administrator for your credentials.

Steps

2. Click Launch Browser Agent Desktop.
The Login window opens.
3. Type your user name in the Username field.
4. If you have been assigned a password, type it in the Password field. Passwords are optional in Oracle Service Cloud, so if you do not have a password, leave this field blank.

Note: Your user name and password are defined in your staff account and both are case sensitive. If you have forgotten your user name or password, click Login Help.
5. Click Login.

Understanding the Agent Browser User Interface console

After you have successfully logged in to the Agent Browser User Interface, the console opens in your web browser where you can view and manage your Oracle Service Cloud data.

The Agent Browser UI console includes the following components.

- **The global header**, located at the top of the console, contains options for working in Oracle Service Cloud.

- **The content pane**, located beneath the global header, is where you work with records and reports.

This table describes the functions of the icons in the global header.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Navigation Menu" /></td>
<td>Click the Navigation Menu icon to display available reports and menu items. The items that display when you initially log in depend on how your application is configured, and the permissions assigned to your staff account and your profile. Items in the navigation list are defined in the Navigation Sets editor on the Service Console.</td>
</tr>
<tr>
<td><img src="image" alt="Quick Search" /></td>
<td>Use the Quick Search function to easily find and open records. Your navigation set defines the Quick Search reports that are available. You have access to the same set of Quick Search reports in both the Agent Browser UI and the Service Console. The Quick Search area includes the following components:</td>
</tr>
<tr>
<td><img src="image" alt="Home" /></td>
<td>Click the Home icon to display the default home report. To specify your default report, click the Navigation Menu to find the report you want to use, right-click the report, and click Set as Browser Desktop Default.</td>
</tr>
<tr>
<td><img src="image" alt="Recent Items" /></td>
<td>Click the Recent Items icon to display a list of recently opened items. By default, the last ten items you opened are listed. You can also search recent items. The default number of items can be changed in the navigation pane settings on the Service Console.</td>
</tr>
</tbody>
</table>
Click the **Add a Record** icon to access a list of record types used to create new records. Only objects supported in Agent Browser UI will display in the list.

The list of items that displays is based on the profile permissions defined on the Service Console.

Click the **Notifications** icon to open the Notifications window where you can view and manage the notifications you receive.

When you have unread notifications, a red badge with the number of unread notifications displays on the Notifications icon.

Click the **Help** icon to view the Agent Browser UI online help documentation in a separate browser window.

Click the user name or the down arrow next to the user name to access the Options menu. Options include Sign Out, About, and Change Password.

## Notifications

Notification messages are sent to appropriate staff members about certain events that have occurred within the system. Your notifications are accessed from the Notifications icon, which displays as a bell, on the global header. You also receive desktop alerts, often referred to as “toast notifications,” when you first log in to the Agent Browser UI and when new notifications are received while you are logged in.

Notifications are triggered by the following events:

- An incident, answer, or task is assigned to you.
- An incident, answer, or task that was assigned to you has been reassigned to another staff member.
- An incident, answer, 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, view details, and take appropriate actions on the notifications in the list.

**Steps**

1. Click **Notifications** on the global header.
   
The **Notifications** window opens. Your notifications are listed with the following information:
• **Unread Indicator**—A blue dot indicates you have unread broadcast or system error notifications or have not acted on an incident- or task-related notification.

• **Type**—Displays the icon associated with the notification type.

• **Who**—Displays who sent the notification.

• **Event**—Displays the event that triggered the notification.

• **Timestamp**—Displays the date and time the notification was sent.

• **Subject**—Displays the notification subject.

2. To view complete message details, click a notification. The corresponding record opens so you can take suitable action.

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

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

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

6. To change your notification settings, click the Notification Settings icon. The Notification Settings window opens.
   a. Clear the **Display Toast Notifications** check box.
   b. Click **Close**.

7. To close the Notifications window, click outside the window.
2 Using Common Functionality

Searching for records

One way to find a specific record when a report is open is by scanning the list of displayed records to see if you can spot it.

Oracle Service Cloud offers other much more efficient methods of searching for records. Besides simply looking in a report for a record, you have the following search options.

- Search for a record from a report—If you do not immediately see the record you want in the report, you can search for it. The filters that appear depend on the report and which filters have been defined for it.
- Searching for records with Quick Search—With the Quick Search component, you can search for a specific record by entering as much or as little information about the record as you have. The list of records that match the information you enter is displayed, and you can select the one you want.
- Searching from open records—You can search for contacts and tasks from any open record that has a contact or task associated with it. You can also search for organizations from some types of open records.

Related Topics

- Search for a record from a report
- Searching from open records

Searching from open records

You can search for contacts, organizations, or tasks from many types of open records. For example, when you are working on an incident, you might need to search for a contact to associate with the incident. The following lists the types of searches you can do from various open records.

- Search for a contact from an open incident, organization, task, or asset.
- Search for an organization from an open contact, incident, task, or asset.
- Search for a task from an open answer, contact, incident, or organization.

Forward a record

There might be times when you need to forward an incident, task, organization, contact, or asset. For example, you might need information from another staff member before you can reply to a customer’s incident.
When you forward a record, you can forward any files that are attached to the record, send other files, add comments, and include a bookmark link. If you are adding a record instead of editing an existing one, you must first save the record before you can forward it.

Steps

1. Do one of the following:
   - Right-click a record in a report and select **Forward**. The **Forward** window opens.
   - With a record selected in a report, click **Forward**.
   - With a record open, click **Actions** and select Forward. (Depending on how the workspace is configured, this option may not be available.)

2. Enter the following field information. The fields that display depend on the type of record you are forwarding.

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To ...</strong></td>
<td>Type the email address in the <strong>To</strong> field and press <strong>Enter</strong>, or click the <strong>To</strong> field to select one or more email addresses from the list. You can search for recipients by typing all or part of a name or email address and then pressing <strong>Enter</strong>. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results.</td>
</tr>
<tr>
<td><strong>Cc ...</strong></td>
<td>Click the <strong>Cc</strong> field to select one or more email addresses from the list. You can search for recipients by typing all or part of a name or email address and then pressing <strong>Enter</strong>. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results. All recipients are able to see the email addresses in the Cc field.</td>
</tr>
<tr>
<td><strong>Bcc ...</strong></td>
<td>Click the <strong>Bcc</strong> field to select one or more email addresses from the list. You can search for recipients by typing all or part of a name or email address and then pressing <strong>Enter</strong>. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results. No recipients are able to see the email addresses in the Bcc field.</td>
</tr>
<tr>
<td><strong>Subject</strong></td>
<td>The subject for the incident, task, or asset appears in this field.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Type any comments you want to forward with the record in this field. Text entered in the <strong>Comments</strong> field will display as the body of the email that is sent to recipients.</td>
</tr>
<tr>
<td><strong>Options</strong></td>
<td>Click the <strong>Options</strong> drop-down menu to select the options to include in the forwarded record.</td>
</tr>
<tr>
<td><strong>Exclude Notes</strong></td>
<td>Select this check box to exclude any notes in the incident thread from being forwarded with the incident. This check box appears only if you are forwarding an incident. If this check box is selected, the changes are retained when forwarding other incidents.</td>
</tr>
</tbody>
</table>
Field/Button | Description
--- | ---
**Send Contact Information** | Select this check box to send the primary contact information with the record. The information that is sent includes the contact’s email address, first and last names, contact type, title, any phone numbers that have been entered, and any custom field information. This check box appears only if you are forwarding an incident.

**Attachment(s)** | Files that are attached to the record you are forwarding are listed in this field. Click X next to any attachment to prevent it from being forwarded to the recipient or click Remove All to remove all attachments from the list. This field is not visible when forwarding tasks or assets or if no files are attached to the incident.

**Attachment(s) icon** | Click the Attachment(s) icon and select Add new file and then click Browse to browse for a file to attach to the email containing the forwarded record. Files added in this field are not added to the record.

3. Click **Send** to forward the record and any selected files.

**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. For example, assume you have a contact record that is associated with an organization. When you add another contact from the same organization, you might want to copy the original contact and edit the names to avoid having to re-enter organization information.

**Prerequisites**

**Steps**

1. Do one of the following:
   - With a report open, click the record you want to copy and click **Copy** followed by the record type you want to copy.
   - 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 3: Copy 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>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>Notes</td>
</tr>
<tr>
<td></td>
<td>Organization Addresses</td>
</tr>
<tr>
<td></td>
<td>File Attachments</td>
</tr>
<tr>
<td>Task</td>
<td>Notes</td>
</tr>
<tr>
<td></td>
<td>File Attachments</td>
</tr>
<tr>
<td>Custom object</td>
<td>Notes</td>
</tr>
<tr>
<td></td>
<td>File Attachments</td>
</tr>
</tbody>
</table>

3. Edit the copied record as necessary.

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

4. Click Save and Close to save your edits to the copied record.

Select a recipient

When you forward records, you can search for a contact from the To, Cc, and Bcc fields.

You can select one or more recipients from the search drop-down menu in the recipient fields. You can select from folders containing all currently enabled staff accounts, staff account groups, distribution lists, and email addresses from all distribution lists.

If your administrator has not added distribution lists, the Distribution Lists and Addresses options will not display.

Steps
1. Do one of the following:
   - Click the **To** field.
   - Click the **Cc** or **Bcc** link.
2. Select the check box next to the name of each recipient you want to include.
   
   **Tip:** You can type the first few letters of the name in the field and press **Enter**. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results. Notice that the results may be an individual’s name, an email address, or a group or distribution list.
3. Click anywhere outside of the search field to close the search drop-down menu and return to the **Forward** window.
4. Click **Send** to forward the record to the recipients you selected and close the **Forward** window.

---

**Creating and using workgroups**

Oracle Service Cloud helps you manage multiple open records without confusion by grouping all associated records into a single **workgroup**.

In the Agent Browser UI, workgroups apply to incidents, answers, contacts, organizations, and tasks. When you open any type of record and then open other records associated with the initial record, you create a workgroup. The set of records in a workgroup can be saved and closed in a single operation.

For instance, the standard incident workspace allows you to add or edit other information associated with the incident, including contacts, organizations, and tasks. When you open a record associated with the open incident (for example, opening the contact record by clicking the Commands icon in the contact field and selecting **Open**), the record opens on a sub-tab below the incident’s content pane tab and becomes the active tab. This creates a workgroup consisting of an incident and a contact record.

Each time you add or edit an additional record associated with the incident, it opens on another sub-tab and becomes part of the workgroup. You can move easily between the records in the workgroup by clicking on the sub-tabs.

All sub-tabs, except for the primary record (in this case, the incident), contain **Accept** and **Reject** icons for taking actions on the individual record within the workgroup.

- **Accept**—Clicking this icon accepts changes made to the record and closes the sub-tab. However, it does not save changes to the database until you click **Save** or **Save and Close** on the toolbar.
- **Reject**—Clicking this icon closes the sub-tab if you haven’t made changes to the record. If you have made changes, a message asks if you want to discard your changes.

Continuing the example of the incident workgroup, clicking the incident sub-tab moves the focus to the incident in the workgroup. Since the incident is the primary record in the workgroup, there are no buttons on the sub-tab. Notice that the initial content pane tab for the primary record shows the number of records in the workgroup.

Tooltips on **Save** and **Save and Close** icons on the ribbon and toolbar let you know which records will be saved by each action.

- **Save**—Save the current record. The record will remain open.
- **Save and Close**—Save the current record and then close it.
In addition, the save icon displays on each individual record in the workgroup. When you hover over one of the save icons, the tooltip indicates which record will be saved by each action.

Note: If you close any record in a workgroup without saving it, it does not impact your changes on any of the workgroup’s other records.

Audit log

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

To use the audit log function on the incident, contact, organization, task, answer, or custom object workspace on the Agent Browser UI, your administrator must include the Audit Log relationship item on the workspace using the workspace designer on the Service Console.

Notes

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

Depending on the permissions set in your profile, you can edit existing notes or delete notes no longer needed. When a record includes multiple notes, you can use the sort menu to sort the notes by Oldest first or Newest first. To use the notes function on the contact, organization, task, answer, or custom object workspace on the Agent Browser UI, your administrator must include the Notes relationship item on the workspace using the workspace designer on the Service Console.

Bookmarks

The Bookmark function gives you 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 the 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 URL action is not active.

2. Do one of the following:
   - On a record, click the Actions drop-down menu and select Bookmark URL.
   - On a report, click the Bookmark icon on the toolbar.

   A pop-up message will display the bookmark.

3. Select and copy the bookmark URL.

4. Click OK.

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
3 Working with Reports

Using reports

You use reports on the Agent Browser UI to access the incidents, contacts, organizations, and other records needed to help your customers. The same reports can be used on the Service Console that you use on the Agent Browser UI. Most reporting functionality you may be accustomed to using on the Service Console is supported on the Agent Browser UI. This includes charts, slicing, rollups, row calculations, data exceptions, drill-downs, and other report options. However, some functionality is not yet supported.

These reporting options are not yet supported.

- Inline editing of records shown on reports
- Displaying data using crosstabs
- Customizing column format options when viewing reports
- Exporting and printing full reports. Individual records shown on reports can be printed. In addition, you can use your browser’s printing options to print the report content shown on the page.

Reports can be accessed by clicking Navigation and then expanding the section your report is in. Reports can also be accessed from any workspaces they have been added to. You add reports to the Navigator Menu from the Service Console’s Navigation Sets editor.

Note: After editing your navigation set in the Navigation Sets editor, you may need to save your profile again before the changes are displayed on the Agent Browser UI.

After selecting a report, you can specify values for the report filters and variables that are configured for the report. If these are not displayed when the report opens, you can access them by selecting the Filters menu. After selecting your search options and clicking the Search button, the report opens. Refer to Search for a record from a report.

Using the buttons shown at the top of the report, 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>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>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>Delete</td>
<td>Click this button to delete the record selected on the report.</td>
</tr>
<tr>
<td>Forward</td>
<td>Click this button to forward the record selected on the report to an email address.</td>
</tr>
</tbody>
</table>
Search for a record from a report

You search for specific records in a report using the report's search parameters. These are defined when the report is created, or edited on the Service Console. Search parameters initially display when the report opens after selecting it from the navigation list. The reports that display in the navigation list are determined by the navigation set assigned to your profile.

There are three types of search parameters.

- **Filters**—These limit records returned in the report, and are the most common search parameters. For example, using filters you can view incidents assigned to certain staff members, answers that contain particular words or phrases, or tasks that are due this week.

- **Output variables**—These group date together using criteria defined in the report definition. Output variables are not used as frequently as filters, and will not appear in all reports. Output variables can group data in many ways, but the variable seen most often in standard reports is the Date Grouping variable. This uses a date field to group the report data by a time period. For example, an incident report with a Date Grouping variable set to Year/Month can return rows showing the numbers of incidents created each month of each year in the report's time frame. You can change the variable's value to group the data by different time periods, such as day, week, or quarter.

- **Page limits**—Search parameters include an option to select how many rows you want on each page of the report. You can also use page limits to specify the maximum number of rows the report can return.

**Steps**

1. Click **Navigation** and select the report you want to search on. The search parameters configured in the report definition display.
2. Enter the values you want to use in the report's filters and output variables. The methods used to select values vary depending on the filters' and variables' data types and operators.
   a. To specify values in drop-down menus, click the menu, and then select or clear the individual check boxes next to the menu's values. You can also select or clear the Select All check box to quickly select or clear all the menu values. To quickly locate specific values in menu lists, type the first few letters of the value you want in the filter's text field and then press Enter.
   b. To specify values in date or date/time fields, click the calendar button in the field to display the current month's calendar, then select the specific date. You can also type entries in the field using the format `mm/dd/yyyy hh:mm:ss`. To specify relative times for the filter, select the filter’s Relative check box. A dialog opens where you define relative times, such as last month, last year, or yesterday.
   c. To specify values in text fields, type text in the field. You can use an asterisk (*) as a wildcard in your search term. There are other considerations when using text fields to search for answers. Refer to **Searching reports for answers**.
3. To specify the number of rows you want returned in the report or on each page, perform these steps.
   a. Select the **Limit To** check box.
b. Type the number of rows you want returned in the **Rows** field. You can also click the arrows to specify the number of rows.

c. To specify that the row limit is for each page of the report, select the **Per Page** check box. When this check box is clear, the limit you enter is a hard limit on the total number of rows the report can return.

4. Click **Search** to display the records that match your search criteria.

**Searching reports for answers**

Special considerations exist when searching reports for answers.

When you are searching for answers, you can use the search text type fields **Phrases**, **Similar Phrases**, **Exact Search**, **Complex Expression**, or **Answer ID**. Enter field information described in the following table to search on text fields.

All search types look for different word forms such as singular, plural, or different verb tenses. For example, searching for *reflect* will find answers that contain *reflection*, *reflections*, *reflected*, *reflecting*, or *reflects*.

All search types use the logical operators + (AND) and – (NOT). Insert + before a word to find answers that must include the word. Insert – before a word to exclude answers containing that word. For a list of special characters that can be used for searching, refer to the Oracle Service Cloud User Guide.

The answer’s Summary, Question, Answer, and Keywords fields are searched for matching terms.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phrases</td>
<td>Select this search technique to search for answers containing the words in the phrase or question you type. Multi-word phrases usually produce better search results.</td>
</tr>
<tr>
<td>Similar Phrases</td>
<td>Select this search technique to search for answers that contain the words or phrase you type as well as answers containing synonyms for the words you enter.</td>
</tr>
<tr>
<td>Exact Search</td>
<td>Select this search technique to search for answers with the same pattern of words as the words you type. Only answers containing an identical pattern of words are matched, although the words in the matching answers may be separated by stopwords such as a, an, or the.</td>
</tr>
<tr>
<td>Complex Expression</td>
<td>Select this search technique to search for answers containing the complex expression you type. This technique allows wildcard searching using an asterisk (*) at the end of a word or partial word and a tilde (~) before a word to perform a similar phrases search on that word only.</td>
</tr>
<tr>
<td>Answer ID</td>
<td>Type a range of answer IDs to search for answers with answer IDs within the specified range. Wildcard characters are not supported in Answer ID searching.</td>
</tr>
</tbody>
</table>

**Sort report data**

Reports have pre-defined sort orders configured in their definitions. However, you can change the sort order to make the report’s data more useful for your needs.
Prerequisites

Steps

1. After you perform a search on the report to display results, identify the column containing the data that you want to sort by.
2. Click the arrow next to the title shown in the column’s header.
   Clicking a down arrow sorts the report’s data in ascending order, such as 1–10 for numeric values or A–Z for text values. Clicking an up arrow sorts the data in descending order.

Resize report columns

Reports have pre-defined column widths specified when the report is created. Column can have fixed widths or relative widths that use a percentage of the available space. However, you can change the width of any column to improve the visibility of the data you want to see.

Prerequisites

Steps

1. After you perform a search on the report to display results, identify the column you want to resize.
2. Hover over the border between the column’s header and the header of the next column to the right. The mouse indicator changes when it is on the border.
3. Drag the border to the right to increase the column width, or to the left to decrease the width.

Result

After you change a column’s width, you may need to resize other columns to display the data as you want. Changes to column widths are lost when you close the report. The column widths display as defined in the report’s definition when you next open the report.

Example

Next Step
4 Working with Organizations

Organizations overview

Just as Oracle Service Cloud uses contact records to provide you and other staff members with a complete view of all activity for an individual customer, it can also provide you with that level of information for an organization and all the contacts, incidents, opportunities, and tasks associated with that organization.

Perhaps you have multiple customers from one organization. For example, a sales representative might have an opportunity that involves engineers, purchasing agents, and support managers from one organization. In those situations, it is vital to have a complete overview of all activity within the organization.

An organization is a business entity with an organization record in the knowledge base. Organizations can refer to companies, divisions of companies, government agencies, educational institutions, or nonprofit associations.

Organization records are an optional way of consolidating customer information, but if you have several individual customers who belong to one organization, maintaining that information in an organization record is an efficient and effective way to group data.

For example, if you work for a cell phone company that provides products and services only to individual consumers, you do not need organization records in the knowledge base. If, however, you sell to business accounts that distribute cell phones to their employees, it makes sense to group all of those employees (each with an individual contact record) under the organization they are associated with. This links the data associated with each of the contacts to the organization, providing you with a single-source view of all activity within the organization.

By definition, an organization can have an unlimited number of contacts. A contact, on the other hand, can be associated with only one organization. Organizations can be structured in a hierarchy that enables you to add subsidiaries, divisions, or regional offices to accurately reflect all areas of the organization.

The customer portal in Oracle RightNow Cloud Service (Service) can be configured so contacts can view all incidents associated with their organization. When contacts view other incidents, they can often find answers to their questions, which reduces the number of incidents they submit.

When your knowledge base contains organization records, you can track a specific organization’s incidents and see trends or problem areas. You can view all of the incidents for the organization from the organization record without having to select each contact individually. Likewise, you can view all opportunities, tasks, attachments, and notes associated with the organization, and view all changes that have been made to the organization record using the audit log.

Standard organization workspace

Oracle Service Cloud provides a standard workspace for working with organizations.

The workspace defines which fields are available, what icons are displayed on the toolbar, and how the information is organized on the content pane.
Your organization may use the standard workspace, or your administrator may have created one or more customized workspaces. Your profile defines the workspace you see when you work with organizations, whether it is the standard workspace or a customized workspace.

## Organization workspace toolbar

The following table describes the icons on the toolbar of the standard organization workspace. Some icons are not enabled until after you have saved an organization you are adding.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Refresh</strong></td>
<td>Click to refresh the current organization record.</td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td>Click to save the changes you have made to the organization and continue working. The organization record remains open. When you save an organization, the rules engine evaluates it. If organization rules exist and the organization matches one or more rules, the record may be modified when you save it. For example, a rule can change an organization’s state or set a custom field value.</td>
</tr>
<tr>
<td><strong>Save &amp; Close</strong></td>
<td>Click to save the contact and close the record.</td>
</tr>
<tr>
<td><strong>New</strong></td>
<td>Click to add an organization.</td>
</tr>
<tr>
<td><strong>Print</strong></td>
<td>Click to print the organization record.</td>
</tr>
<tr>
<td><strong>Bookmark</strong></td>
<td>Click to create a URL bookmark of the record that can be copied and shared.</td>
</tr>
</tbody>
</table>

These additional icons are available from the Actions drop-down menu.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delete</strong></td>
<td>Click to delete the organization record.</td>
</tr>
<tr>
<td><strong>Copy</strong></td>
<td>Click to copy the organization record.</td>
</tr>
</tbody>
</table>

**Caution:** Deleting an organization permanently removes all contacts associated with the organization from the knowledge base. It also deletes all incidents for which the contacts are the primary contacts, and it may delete opportunities as well.
Organization record tabs

From an open organization record, you can view all contacts, tasks, attachments, notes, incidents, and the organization’s position in a hierarchy. You can also view the audit log, which lists all actions taken on the organization record by staff members and through automatic system updates.

- **Summary tab**—Contains all key fields for the organization.

- **Contacts tab**—Lists all contacts associated with the organization. For each contact, the tab displays the name, email address, organization name, office phone number, and title. You can open, print, copy, remove from the organization, and send an email, from the Contacts tab.

- **Notes tab**—Contains all notes associated with the organization. Notes can be sorted by date. Customers never see the notes added by staff members.

- **Tasks tab**—Lists all tasks associated with the organization. For each task, the tab displays the task name, due date, completion date, staff member assigned to the task, and priority. You can open, copy, delete, print, and forward any task.

- **Incidents tab**—Lists all incidents associated with the organization. For each incident, the tab displays status, response time, resolution time, source, reference number, and subject. You can open, copy, delete, print, and forward an incident.

  - **Note:** If you change the incident’s contact to one that is not associated with the organization, the incident will not appear on the tab.

- **Attachments tab**—Lists all attachments associated with the organization. The Attachments tab displays the file name, size, date created, date updated, and a description for each attachment.

- **Audit Log tab**—Lists all actions taken on the organization record by you and other staff members. It also displays any automatic changes initiated by Oracle Service Cloud that resulted from the application of business rules or through configuration settings. When an action is generated by the system, the Who field contains Administrator. You can also see who worked on the organization, when it was added or updated, the actions taken, and descriptions of the actions.

Add an organization

You can add organizations independently of other records, or you can add them when you work on contacts.

Because other staff members may have permission to add organizations, the organization you plan to add may already be in the knowledge base. To avoid duplicating organization records, search the knowledge base before adding an organization to be sure it does not already exist.

Steps

1. Click **Add a Record** and select **Organization**. A new organization workspace opens with the Summary tab active.
2. Complete the fields on the Summary tab. See **Organization workspace fields**.
3. To add contacts to the organization, click the **Contacts** tab.
4. To add notes to the organization record, click the **Notes** tab, click **Add**, and type your comments in the field. Click the Org Note drop-down menu to select the channel through which you gained the information you are adding to the note.
Note: Add notes to the organization when you want to provide information for other staff members. Notes are not visible to customers.

5. To associate tasks with the organization, click the Tasks tab, where you can add, edit, print, copy, assign, delete, and forward tasks associated with the organization.

6. To associate the organization with a new incident, click the Incidents tab, click Add New, and complete the incident fields.

7. To attach files to the organization record, click the Attachments tab.

8. To view the audit log for the organization, click the Audit Log tab.

9. If the organization you are adding is on a sub-tab (because you are adding the organization to a contact), click Save & Close. The sub-tab closes.

Note: Closing the new organization sub-tab saves the organization data in memory, but the organization is not added to the knowledge base until you save the contact you added the organization to.

10. Click Save.

Organization workspace fields

Summary tab fields of the default Organization workspace are described below.

Fields marked with an asterisk are required and must be completed before you can save the record.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Organization Name</td>
<td>Type the name of the organization.</td>
</tr>
</tbody>
</table>

Billing Address

Click Edit in the lower right corner of the field to display a window for entering the organization’s address. Type information in the Street, City, and Postal Code fields, and make selections on the Country and State/Prov. fields drop-down menus. When you select the country, the associated states or provinces appear in the State/Prov. menu. Click OK when you are finished to close the window and display the address.

To select another address type, either Shipping or any custom address organization type, click the arrow and select the address type. Then complete the address information.

<table>
<thead>
<tr>
<th>*State</th>
<th>Click in this field and select one or more of the following states.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service</td>
<td></td>
</tr>
<tr>
<td>Outreach</td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td></td>
</tr>
</tbody>
</table>

The State field classifies how the organization was added (whether through Service when working on an incident, Oracle RightNow Outreach Cloud Service (Outreach) when adding contacts, or Oracle RightNow Opportunity Tracking Cloud Service (Opportunity Tracking) when working on an opportunity). The State field may be updated automatically, and you can also update it manually.
### Edit an organization

You may find yourself in the position of needing to view or update organization information. Depending on the permissions set in your profile, you can view organization information, edit organizations, copy, print, and delete organizations, and remove contacts from an organization.

**Steps**

1. Open the organization record you want to edit.
2. Make the necessary changes to any field on any tab.
3. Click **Save** to save the changes to the organization.

### Delete an organization

The following procedure describes how to delete an organization.

⚠ **Caution:** Deleting organization records can affect other staff members within your organization. This action permanently removes not only the organizations from the knowledge base, but also all contacts associated with the organization and the incidents and opportunities for which the contacts are primary contacts.

**Steps**

1. Click **Delete** in the **Actions** column for the organization you want to delete.
2. Click **Yes** to delete the organization, all associated contacts, and all incidents and opportunities for which the deleted contacts are primary contacts.
Remove contacts from an organization

The following procedure describes how to remove contacts from an organization.

Steps

1. Open the organization record you want to work with.
2. In the list of contacts, right-click the one you want to remove from the organization and select Remove.
3. Click Yes to confirm the removal of the contact.
4. To remove additional contacts, repeat the previous steps.
5. Click Save.

Result

Contacts are removed from the organization but not from the knowledge base.
5 Working with Contacts

About Contacts

Customer data is the foundation of Oracle Service Cloud. It includes basic information such as a customer’s name, email address, and phone number as well as information about customer service issues, opportunities, and marketing mailings opt-in status.

The contact information you add and edit becomes part of your organization’s knowledge base and is shared with all staff members. If you are a sales representative, for example, you should know if a customer is having support issues before you try to close a sale. If you are a service agent, you can better help customers if you understand their past support questions.

When customer information is kept up-to-date, the knowledge base provides complete information to your entire organization. The results make your job easier and provide a superior customer experience.

Contacts overview

Every customer has a contact record in the knowledge base that contains information about the customer. But before you can understand contacts, you must first understand how contacts and organizations are associated and also how contacts are associated with incidents and opportunities.

Familiarize yourself with the following points before adding or editing contacts.

- An organization is any business entity that has an organization record in the knowledge base. For example, organizations can refer to companies, divisions of companies, government agencies, educational institutions, or nonprofit associations.

- Contacts may or may not belong to an organization. If your customers are other organizations, you might have several contacts associated with an organization record. If, on the other hand, your customers are individuals rather than organizations, every contact record represents a unique customer. It is also possible that you have both organizations and contacts as customers.

- Each contact is associated with only one organization, but an organization can have many contacts. Each contact record displays all incidents, opportunities, tasks, surveys, marketing activity, attachments, and notes for the contact, as well as the audit log, which displays all activity for the contact record.

- Every incident must have a primary contact. If your profile gives you the appropriate permissions, you can change contact associations and delete contact records. Because these actions can have far-reaching consequences on incidents as well as opportunities, it is important to understand what happens when you make such changes.
Deleting contacts

There are usually consequences when a contact is deleted. If the contact is associated with multiple incidents or multiple opportunities or both, different results may occur with each record, depending on the type of associations and the association of other contacts with the record.

In cases where the contact has multiple incidents and opportunities, follow the flowchart for each record the contact is associated with to discover what will happen to the record if you delete the contact.

For example, assume a contact is associated with two opportunities. Also assume that the first opportunity does not have an organization association while the second one does, and that neither opportunity has a secondary contact. Deleting the contact removes the contact from the knowledge base and deletes the first opportunity. The second opportunity remains in the knowledge base, although the contact no longer appears on the Contacts tab.

⚠️ Note: When you delete secondary contacts for incidents and opportunities, the incidents and opportunities are not deleted.

Standard contact workspace

Oracle Service Cloud provides a standard workspace for working with contacts.

The standard contact workspace defines which fields are available, what icons are displayed on the toolbar, and how the information is organized on the content pane.

Your organization may use the standard workspace, or your administrator may have created one or more customized workspaces. Your profile defines the workspace you see when you work with contacts, whether it is the standard workspace or a customized workspace.

Contact workspace toolbar

The following table describes the icons on the toolbar of the standard contact workspace.

Some icons are not enabled until after you have saved a contact you are adding.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Click to refresh the current contact record.</td>
</tr>
<tr>
<td>Save</td>
<td>Click to save the changes you have made to the contact and continue working. The contact record remains open.</td>
</tr>
<tr>
<td></td>
<td>When you save a contact, the rules engine evaluates it. If contact rules exist and the contact matches one or more rules, the record may be modified when you save it. For example, a rule can change a contact’s state or set a custom field value.</td>
</tr>
<tr>
<td>Save &amp; Close</td>
<td>Click to save the contact and close the record.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>New</td>
<td>Click to add a contact.</td>
</tr>
<tr>
<td>Print</td>
<td>Click to print the contact record.</td>
</tr>
<tr>
<td>Bookmark</td>
<td>Click to create a URL bookmark of the record that can be copied and shared.</td>
</tr>
</tbody>
</table>

These additional icons are available from the **Actions** drop-down menu.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Click to delete the contact record.</td>
</tr>
<tr>
<td></td>
<td><strong>Caution:</strong> Be sure you understand the consequences of this action before you delete a contact.</td>
</tr>
<tr>
<td>Reset Password</td>
<td>Click to invalidate the contact’s current password.</td>
</tr>
<tr>
<td></td>
<td>This action sends an email to the contact’s primary email address. Included in the email is a link to a page where a new password can be set.</td>
</tr>
<tr>
<td>Copy</td>
<td>Click to copy the contact record.</td>
</tr>
</tbody>
</table>

**Contact record tabs**

From an open contact record, you can view all notes, tasks, incidents and attachments associated with the contact. You can also view the audit log, which lists all actions taken on the contact record by the customer, staff members, and through automatic system updates.

- **Summary tab**—Contains all key fields for the contact.
- **Notes tab**—Contains all notes associated with the contact. Notes can be viewed and selected by contact or organization and sorted by date. Remember that customers never see the notes added by staff members.
- **Tasks tab**—Lists all tasks associated with the contact. For each task, the tab displays the task name, due date, completion date, the staff member assigned to the task, and priority. You can open, copy, delete, print, and forward any task and mark tasks complete.
- **Incidents tab**—Lists all incidents associated with the contact. For each incident, the tab displays status, time beyond the response threshold, time beyond the resolution threshold, source, reference number, and subject. You can open, copy, delete, print, and forward an incident.
- **Attachments tab**—Lists all attachments associated with the contact. The tab displays the file name, size, date created, date updated, and a description for each attachment.
- **Audit Log tab**—Lists all actions taken on the contact record by you, other staff members, and the customer. It also displays any automatic changes initiated by Oracle Service Cloud that resulted from the application of business rules or through configuration settings. When an action is generated by the system, the **Who** field contains Administrator. You can also see who worked on the contact, when it was added or updated, the actions taken, and descriptions of the actions.
Note: Your workspace tabs may be different if your administrator assigned a custom contact workspace to your profile.

Add a contact

Contacts can be added to the knowledge base by customers and staff members.

A customer can add a contact record when creating an account on the customer portal. Staff members can add contacts using a contact workspace or when working on incidents, organizations, tasks, and contact lists. Follow this procedure to add a new contact with the Add a Record option.

Note: Because many staff members can have permission to add contacts, the contact you plan to add may already be in the knowledge base. To avoid duplicating contact records, search the knowledge base before adding a contact to be sure it does not already exist.

Steps

1. Click Add a Record and select Contact. A new contact workspace opens with the Summary tab active.
2. Complete the fields on the Summary tab. See Contact workspace fields.
3. To add notes to the contact record, click the Notes tab, click Add, and type your comments in the field. Click the Contact Note drop-down menu to select the channel through which you gained the information you are adding to the note.
   Add notes to the contact when you want to provide information for other staff members. Notes are not visible to customers.
4. To associate tasks with the contact, click the Tasks tab where you can add, open, print, copy, assign, delete, and forward tasks associated with the contact.
5. To associate the contact with a new incident, click the Incidents tab. Click Add New to open a new incident on a sub-tab, and then complete the fields.
6. To attach files to the contact record, click the Attachments tab.
7. To view the audit log for the contact record, click the Audit Log tab.
8. Click Save.

Contact workspace fields

Summary tab fields of the default Contact workspace are described below.

Fields marked with an asterisk are required and must be completed before you can save the record.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*First Name</td>
<td>Type the contact’s first name in this field.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>*Last Name</td>
<td>Type the contact’s last name in this field.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Type the contact’s email address in this field. To add alternate email addresses, click the arrow and select Email Alt 1 or Email Alt 2. Then type the alternate email address in the field. If you enter an email address that is already in the knowledge base, you will receive an error message and not be able to save the contact. If email address sharing is enabled, meaning multiple contacts can share the same email address, a yellow icon with a black exclamation point displays when you type an email address that is associated with a different contact in the system. If this icon appears, you can save the contact without changing the contact’s email address. Email address sharing validation begins when the Email address field receives focus and ends when the field loses focus. Click the email icon within this field to open your email client with an untitled message to the contact.</td>
</tr>
<tr>
<td>Office Phone</td>
<td>Type the contact's phone number in this field. To add other phone numbers, click the arrow, select one of the options, and type the phone number in the field. The options include Mobile, Fax, Assistant, and Home.</td>
</tr>
<tr>
<td>Address</td>
<td>Click Edit in the lower right corner of the field to display a window for entering the contact's address. Type information in the Street, City, and Postal Code fields, and make selections on the Country and State/Province fields drop-down menus. When you select the country, the associated states or provinces appear in the State/Province menu. Click OK when you are finished to close the window and display the address you entered.</td>
</tr>
<tr>
<td>Contact Type</td>
<td>Click this drop-down menu and select a contact type. These options are unique to your organization and were added by your administrator.</td>
</tr>
<tr>
<td>*State</td>
<td>Click in this field and select one or more of the following states: Service, Outreach, or Opportunities. The State field classifies how the contact was added, whether through Oracle RightNow Cloud Service (Service) when working on an incident, Oracle RightNow Outreach Cloud Service (Outreach) when adding contacts, or Oracle RightNow Opportunity Tracking Cloud Service (Opportunity Tracking) when working on an opportunity, and what areas of Oracle Service Cloud the contact has since had activity in. The State field may be updated automatically, and you can also update it manually.</td>
</tr>
<tr>
<td>Organization</td>
<td>Click the Filters icon to the right of the Organization field to open the Organization Search window and search for an organization to associate with the contact. Wildcards are supported. You can also type the first letter of the organization name and press enter for a list of organizations beginning with that letter to select from. This field defaults to No Value. Click the Commands drop-down list to open this record, clear this association, or add a new organization.</td>
</tr>
<tr>
<td>Salesperson</td>
<td>Click in this field to select a salesperson from a drop-down menu. This field defaults to No Value.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Title</td>
<td>Type the contact’s title in this field.</td>
</tr>
<tr>
<td>Login</td>
<td>Type a name in this field to designate a login for the customer to use when logging in to the customer portal. If the customer added the contact record on the customer portal, this field displays the login the customer entered. This field applies only to Service. A login must be unique for each contact if Email Address Sharing is enabled. The login may not contain a space, single quote, double quote, less than, or greater than character. We recommend that you use ASCII characters when creating a customer login.</td>
</tr>
<tr>
<td>Global Opt-in</td>
<td>Click this drop-down menu and select Yes if the customer has opted to receive marketing mailings and No if the customer does not want to receive them.</td>
</tr>
</tbody>
</table>

Adding contacts from other records

You can add or edit a contact from the Contacts tab when you work with incidents and organizations or by right-clicking a contact from any report. If you are adding a contact on a sub-tab (because you are adding the contact to a contact list, incident, opportunity, or task), click Save & Close to close the sub-tab after making your changes. Closing the New Contact sub-tab saves the contact data in memory, but the contact record is not added to the knowledge base until you save the record you have added the contact to.

Remove a contact from a record

There might be times when you want to remove a contact from a record but do not want to delete the contact from the knowledge base. In those instances, you can remove the contact from the incident, organization, or contact list.

⚠️ Note: To remove a contact from an open task, select the name in the Contact field and select Clear.

Steps

1. On the Contacts tab of the record, select the contact you want to remove and click Remove. A message asks you to confirm that you want to remove the contact.
2. Click Yes to confirm removal of the contact. The contact remains in the knowledge base but is no longer associated with the record.
3. Click Save to save the change to the record.
Edit a contact

It is highly likely you will encounter situations where you need to update contact information for contacts that are already in the knowledge base.

Depending on the permissions set in your profile, you can edit a contact record whenever you need to add or change customer information. You can also copy, print, and delete contacts.

Tip: If you want to delete a contact but do not want to delete the incidents and opportunities associated with that contact, you can specify different contacts for the incidents and opportunities before you delete the original contact.

Steps

1. Open the contact record you want to edit.
2. Make the necessary changes to any field on any tab.
3. Click Save to save the changes to the contact.

Delete a contact

The following procedure describes how to delete a contact.

Caution: Deleting contact records can affect other staff members within your organization. This action permanently removes not only the contacts from the knowledge base, but also all incidents for which the contact is the primary contact. Opportunities might also be deleted, so you must understand the consequences of deleting contacts before doing so.

Steps

1. Right-click a contact and select Delete. A message asks you to confirm that you want to delete the contact.
2. Click Yes to delete the selected contact.
6 Working with Tasks

Tasks: overview

With task functionality, you can add tasks to records you are working on. In addition, you can add standalone tasks that are not related to specific records. By keeping track of all tasks in Oracle Service Cloud, you can monitor everything you must do from a single location, all but eliminating the possibility of forgetting a critical task.

You can add tasks from the file menu or the Tasks tab on records. By familiarizing yourself with the standard workspace for tasks, you will know how to add and edit tasks during your workday.

Standard task workspace

Oracle Service Cloud provides a standard workspace for working with tasks.

The standard task workspace defines which fields are available, what icons are displayed on the toolbar, and how the information is organized on the content pane.

Your organization may use the standard workspace, or your administrator may have created one or more customized workspaces. Your profile defines the workspace you see when you work with tasks, whether it is the standard workspace or a customized workspace.

Task workspace toolbar

The following table describes the icons on the toolbar of the standard task workspace.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Click to refresh the current task record.</td>
</tr>
<tr>
<td>Save</td>
<td>Click to save the task and keep it open for editing.</td>
</tr>
<tr>
<td></td>
<td>When you save a task, the rules engine evaluates it. If task rules exist and</td>
</tr>
<tr>
<td></td>
<td>the task matches one or more rules, the task may be modified when you</td>
</tr>
<tr>
<td></td>
<td>save it. For example, a rule can change a task’s status or assign it to a</td>
</tr>
<tr>
<td></td>
<td>different staff member.</td>
</tr>
<tr>
<td>Save &amp; Close</td>
<td>Click to save the task and close the record.</td>
</tr>
<tr>
<td>New</td>
<td>Click to add a task.</td>
</tr>
</tbody>
</table>
## Oracle Service Cloud
### Using the Agent Browser User Interface

#### Chapter 6

#### Working with Tasks

### Task record tabs

The standard workspace for tasks includes the following tabs.

- **Summary tab**—Contains all key fields for the task. You can also select a record with which you want to associate the task.

- **Attachments tab**—Contains the attachments associated with the task. The tab displays the file name, size, date created, date updated, and a description for each attachment. You can manage attachments for the task on this tab.

- **Audit Log tab**—Lists all actions taken on the task record by you and other staff members. It also displays any automatic changes initiated by Oracle Service Cloud that resulted from the application of business rules or through configuration settings. When an action is generated by the system, the **Who** field contains Administrator. You can also see who worked on the task, when it was added or updated, the actions taken, and descriptions of the actions.

- **Notes tab**—Contains task notes that can be sorted by date. You can add or edit notes for the task on this tab. Remember that customers never see the task notes added by staff members.

### Add a task

You can add a standalone task to serve as a reminder to yourself, or you can add a task to a specific record when you are working on the record.

When you add a task, you define its name, the staff member it is assigned to, relevant dates, and other task information. You can also associate it with existing records.

When you add a task in a workgroup, clicking **Save** accepts changes made to the record and closes the sub-tab. However, it does not save changes to the database until you click **Save** for the workgroup.

---

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>Click to print the task.</td>
</tr>
<tr>
<td>Bookmark</td>
<td>Click to create a URL bookmark of the record that can be copied and shared.</td>
</tr>
</tbody>
</table>

These additional icons are available from the **Actions** drop-down menu.

- **Delete**
  - Click to delete the task.

- **Copy**
  - Click to copy the task.

- **Forward**
  - Click to forward the task through email. You can attach files to the forwarded task.
Steps

1. Click **Add a Record** and select **Task**.
   A new task workspace opens with the Summary tab active.
2. Complete the fields on the Summary tab. See **Task workspace fields**.
3. To attach files to the task, click the **Attachments** tab.
4. To view the audit log for the task, click the **Audit Log** tab.
5. To add notes to the task, click the **Notes** tab. Click the Task Note drop-down menu to select the channel through which you gained the information you are adding to the note.
   Add notes to the task when you want to provide information for other staff members. Notes are not visible to customers.
6. Click **Save** to save the task.

**Task workspace fields**

Summary tab fields of the default Task workspace are described below.

Fields marked with an asterisk are required and must be completed before you can save the record.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Type the name of the task.</td>
</tr>
<tr>
<td><strong>Assigned</strong></td>
<td>This field defaults to your name in the standard tasks workspace, but you can click the drop-down menu to assign the task to a different staff member if you have permission.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Click this drop-down menu and select a status. The status options include Not Started, In Progress, Completed, Waiting, and Deferred.</td>
</tr>
<tr>
<td><strong>Percent Complete</strong></td>
<td>Type a value for the percentage of the task that is complete.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Click this drop-down menu and select Low, Normal, or High as the task’s priority.</td>
</tr>
<tr>
<td><strong>Due Date</strong></td>
<td>Click the calendar and clock icons and select the date and time the task is due.</td>
</tr>
<tr>
<td><strong>Planned Completion</strong></td>
<td>Click the calendar and clock icons and select the task’s planned completion date.</td>
</tr>
<tr>
<td><strong>Date Completed</strong></td>
<td>Click the calendar and clock icons and select a completion date for the task.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Task Type</strong></td>
<td>Click this drop-down menu to select a task type. If you are adding the task from an open record, the task type selection defaults to the type of record being edited.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>Type any notes about the task in this field.</td>
</tr>
<tr>
<td><strong>Organization, Contact, or Incident</strong></td>
<td>Complete the records the task is associated with. If you have selected a task type, you can also make a selection for the associated record (organization, contact, or incident). To search for a record, type the first few characters of the record in the field and press Enter. An implied wildcard is used, so all records that begin with the letters you type are returned in the search results. You can also click the Filters icon to open the search window. Wildcards are supported. Click the Commands drop-down list to open this record, clear this association, or add a new record.</td>
</tr>
<tr>
<td><strong>Answer</strong></td>
<td>If this task was created from an answer, this field will display the record the task was created from. Click the Commands drop-down list to open this record, clear this association, or add a new record.</td>
</tr>
<tr>
<td><strong>Opportunity, Campaign, Mailing, Survey, or Document</strong></td>
<td>If this task was created from an opportunity, campaign, mailing, survey or document record, this field will display the record the task was created from. This field is read-only.</td>
</tr>
</tbody>
</table>

### Complete a task

You can change the status of a task to **Complete**.

**Steps**

1. Open a task.
2. Enter 100 in the Percent Complete field. If your administrator has added a Complete icon to the Actions options, you can also click Complete. The Status field changes to Completed and the Date Completed field changes to the current date.
3. Click Save.

### Edit a task

Depending on the permissions set in your profile, you can edit, copy, and delete tasks, forward tasks, and mark them complete.

**Steps**
1. Open the task you want to edit.
2. Make the necessary changes.
3. Click Save.

Delete a task

Deleting a task removes it permanently from the knowledge base.

Steps

1. Open the task you want to delete.
2. Click the Actions drop-down menu and select Delete. The Task Delete confirmation window displays.
3. Click Yes.
7 Working with Incidents

Incidents overview

When customers request help through email or the Ask a Question page, or you respond to a social networking post using the Social Monitor component, Service automatically creates incidents. Most of the time, these are the incidents you will respond to. At other times, however, you will add incidents. For example, when a customer contacts you by phone, fax, or mail, you will add an incident to create a record of the customer’s question. When you work with customers to solve their support issues, you are instrumental in creating a positive impression of your organization. As an agent, you are often the customer’s first point of contact, and it is important to resolve their concerns quickly and efficiently the first time. Oracle Service Cloud helps you do this by providing comprehensive, accurate, and up-to-date information about all aspects of the customer’s communication with your organization.

When you edit or add an incident, you start by answering the customer’s question. Service provides help through standard text and the ability to search the knowledge base. You define specific information about the incident, such as the staff member it is assigned to, the associated products and categories, and the status and disposition of the incident.

Working with incidents also gives you the ability to add or update contact information, add or edit tasks related to the incident, attach files to the incident, and view all actions taken on the incident.

Note: Service automatically handles email between separate Oracle Service Cloud sites and the site-specific incidents are accurately updated on each site even if unique reference numbers are used for the same incident.

Standard incident workspace

Oracle Service Cloud provides a standard workspace for working with incidents.

The standard incident workspace defines which fields are available, which icons are displayed on the toolbar and Actions menu, and how the information is organized on the content pane.

Your organization may use the standard incident workspace, or your administrator might have created one or more customized workspaces. Your profile defines the workspace you see when you work with incidents, whether it is the standard workspace or a customized workspace.

Incident toolbar

The following table describes the icons on the toolbar of the standard incident workspace in the Agent Browser UI.
Table 12: Incident Toolbar

<table>
<thead>
<tr>
<th>Group/Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Click this icon to refresh the current set of incident records.</td>
</tr>
<tr>
<td>Save</td>
<td>Click this icon to save the incident you are working on. The incident remains open. When you save an incident, the rules engine evaluates it. If incident rules exist and the incident matches one or more rules, the record may be modified when you save it.</td>
</tr>
<tr>
<td>Save and Close</td>
<td>Click this icon to save the incident you are working on and close the incident.</td>
</tr>
<tr>
<td>New</td>
<td>Click this icon to add an incident.</td>
</tr>
<tr>
<td>Print</td>
<td>Click this icon to print the incident.</td>
</tr>
<tr>
<td>Bookmark URL</td>
<td>Click this icon to create a URL bookmark of the incident that can be copied and shared.</td>
</tr>
</tbody>
</table>

Actions

With the exception of New, the options in this drop-down menu are not enabled until after you have saved the incident you are adding.

Copy

Select this option to copy the incident.

Delete

Select this option to delete the incident.

Forward

Select this option to forward the incident to any email address, staff account, or group.

New

Select this option to add an incident.

Print

Select this option to print the incident.

Send

Select this option to send the response you are working on to the primary contact and anyone in the CC and BCC fields if shown.

Bookmark URL

Select this option to create a URL bookmark of the incident that can be copied and shared.
Record tabs

Using the incident record tabs, you can respond to the customer and add and edit other information relevant to the incident.

You can also work on the incident in stages if you choose, letting you save the changes and then return later to complete your work.

Note: If you make changes to fields on any of the incident record tabs or any of the sub-tabs or windows opened through the record tabs (for example, the contact editing sub-tab), you must save the incident in order for all changes on the record tabs to take effect. If you close the record without saving changes, those changes are lost.

- **Summary tab**—Contains all key fields for the incident.
- **Messages tab**—Contains fields that allow you to add a customer entry, response, or private note to the incident thread and respond to the customer. You can also search the knowledge base for public answers and insert standard text into your response.
- **Contacts tab**—Lists all contacts associated with the incident. You can add, open, print, copy, delete, remove, and email contacts from the incident.
- **Details tab**—Contains fields for collecting additional information about the incident, which is beneficial for reporting purposes.
- **Time Billed tab**—Time Billed is not currently supported in the Agent Browser UI.
- **Tasks tab**—Lists all of the tasks associated with the incident. You can add, open, copy, delete, print, and forward tasks and mark tasks complete.
- **Organization tab**—Lists the organization associated with the incident.
- **Web Visit tab**—Lists all actions the customer took before submitting the incident. Also provided are the client IP address, operating system, and browser used by the customer during their visit.
- **Attachments tab**—Lists all files attached to the incident. For instance, if a customer forwards a document that is associated with the incident, the Attachments tab provides a convenient location where you can store the document for retrieval. You can add, open, download, delete, and view the properties of file attachments from this tab.
- **Audit Log tab**—Contains a permanent list of all actions associated with an incident, including the date of the action, who performed the action, what the action was, and a description of the action. This information is valuable for tracking interactions with customers, especially if more than one staff member works on the same incident.

Fill your inbox

If your profile has incident editing permission and queues assigned to it, you can click Fill Inbox on the toolbar of any incidents report.

When you open the My Inbox report from the navigation menu, the incidents that are assigned to you are displayed. As you respond to and solve incidents, their status changes to Solved or Waiting. You can continue to refill your inbox to retrieve new unresolved incidents.

Click Fill Inbox on the toolbar of any incidents report.
If your profile has been set to a manual pull policy, the Manual Queue Pull window opens and you can click the arrow to select the queue to pull incidents from. If only one queue is configured to pull incidents from, the Manual Queue Pull window does not display.

If the displayed incidents report does not display incidents by assigned staff member, open the My Inbox report to view incidents that were added when you clicked Fill Inbox.

Unresolved incidents in any of the queues designated in your profile are available to be pulled. The order in which you work on incidents is determined by the queue priority and any processes set up by your administrator.

Editing incidents

The fields you see when adding or editing an incident are defined in a workspace that is assigned to your profile. Some of the fields are required by default, and your administrator may require that other fields also be completed. You must complete any field marked with an asterisk before you can save the incident. Incidents do not have to be completed in any particular order, but you must complete all required fields before you can save an incident.

The following list provides the steps involved when editing an incident.

- Complete the required incident fields.
- Compose your response to the customer.
- Add or edit contact information.
- Add or edit tasks associated with the incident or its contact.
- Add or edit organization information.
- Send a response to the customer.

You can save the incident at any stage of the process and either continue editing or close the incident and return later to complete it.

Incident statuses

Incidents can have one of the four default incident statuses, or they may have a custom status defined by your administrator.

The default statuses are Unresolved, Solved, Updated, and Waiting.

Depending on how Service is configured in your organization, the status can change automatically when you or the customer make changes to the incident. You can also change an incident’s status manually.

The following example describes how an incident’s status can change automatically.

1. A customer submits a question from the Ask a Question page. The new incident has a status of Unresolved.
2. The customer updates the question before you begin working on the incident. The incident remains unresolved, but the incident status changes to Updated to reflect the customer’s actions and alert you to the change.
3. You edit the incident and send a response to the customer. Your system may be configured in either of the following ways to automatically change the status, or it may be configured so that no status change occurs.

- The incident’s status changes to **Solved**.

> **Note:** Regardless of how your system is configured, the status of an incident automatically changes to **Solved** when the customer selects “No, I don’t need this question answered now” on the question details page or through the link in the email response. You will receive an incident notification.

- The incident’s status changes to **Waiting**. The Waiting status signifies that you have sent a response and are waiting for the customer to let you know if this answers the question. If your system has this configuration and the customer does not respond within forty-eight hours (the default time), the system automatically changes the status to **Solved** and sends an email to the customer.

### Edit key incident fields

After understanding the role of incident statuses, you can edit the key incident fields.

The following procedure describes the standard incident workspace. Keep in mind that your workspace may contain different fields. Fields marked with an asterisk are required and must be completed before you can save the incident.

#### Steps

1. From an incidents report, right-click the incident and select **Open - Incident**.
2. Enter the following field information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Subject</td>
<td>Type a subject for the incident in this field. If the customer originated the incident, this field contains the customer’s summary of the question, which you can edit if necessary (for example, to make the question more specific).</td>
</tr>
<tr>
<td>Reference #</td>
<td>The incident’s reference number is a read-only field with a value assigned by Service.</td>
</tr>
<tr>
<td>*Status</td>
<td>Click this drop-down menu and select an incident status. The options include <strong>Solved</strong>, <strong>Unresolved</strong>, <strong>Updated</strong>, and <strong>Waiting</strong>, as well as any custom incident statuses added by your administrator.</td>
</tr>
<tr>
<td>Assigned</td>
<td>Click this drop-down menu and select a staff member or group to assign the incident to. On the standard incident workspace, this field contains your name by default.</td>
</tr>
<tr>
<td>Disposition</td>
<td>Click this drop-down menu and select a disposition that indicates the resolution of the incident. There may be multiple levels of dispositions for you to select.</td>
</tr>
</tbody>
</table>
Using the Agent Browser User Interface

Chapter 7

Working with Incidents

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Contact</td>
<td>Do one of the following:&lt;br&gt;&lt;ul&gt;&lt;li&gt;Type the first letters of the contact’s name and press Enter to search for the contact. If there is a matching record, it will be populated in the Contact field. If there is more than one matching record you will be able to select from the matching records.&lt;/li&gt;&lt;li&gt;Click the Commands icon and select Add New to open a new contact record. Complete the appropriate fields and then save.&lt;/li&gt;&lt;/ul&gt;</td>
</tr>
<tr>
<td>Organization Name</td>
<td>This read-only field contains the name of the organization for the contact associated with the incident.</td>
</tr>
<tr>
<td>Product</td>
<td>Click this drop-down menu and select one or more product levels to indicate the product for the incident.</td>
</tr>
<tr>
<td>Category</td>
<td>Click this drop-down menu and select one or more category levels to indicate the category for the incident.</td>
</tr>
</tbody>
</table>

3. To add other key incident fields, click the Details tab.

### Sending responses

When you have completed a response to an incident, you are ready to send your reply to the customer. Options available when you send a response include attaching files and copying other recipients.

In the Agent Browser UI, the thread control on the incident workspace appears differently than on the Service Console. In particular, you can 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 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:** To be able to send incident responses, you must have incident Add/Edit and Send Response permissions set in your profile.

The behavior for sending responses depends on the settings your administrator selected when creating the incident workspace for your profile. By default, response messages are committed to the thread list when the incident is saved.

### Send an incident response
When you send an incident response, the default response channel on the Messages tab is Email and the email address of the primary contact associated with the incident displays in the To field. This allows you to begin typing a response in the response field immediately, allowing you to complete incident responses with less clicks, improving your response time.

**Steps**

1. Click the **Messages** tab in an open incident.
   The primary contact's email address displays in the To field.

2. To change the default response type, click the **Compose Response** drop-down menu and select the response channel.
   Channel types include No Channel, Phone, Fax, Post, CSS Web, and Email.

3. To add Cc recipients, type the email address in the Cc field or select one or more email addresses from the list. You can search for recipients by typing all or part of a name or email address and then pressing **Enter**. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results.

4. To add Bcc recipients, type the email address in the Bcc field or select one or more email addresses from the list. You can search for recipients by typing all or part of a name or email address and then pressing **Enter**. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results.

5. Type your response in the message field.

6. To add an attachment to the response, click the **Attachment** icon (paper clip).
   a. To attach a new file to the response, select **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.
   b. 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.
   c. To attach additional files to the response, repeat the substep above.
      Once the response is sent, a File Attachments icon (paperclip) displays in the response thread, indicating attachments were sent with the response.
   d. To remove a file attachment from the list, click **Delete** (x) next to the attachment at the bottom of the message field.

   ✏️ **Note:** Attachments can be added only to email responses. The maximum file size for each attachment is 20MB.

7. To include standard text in an incident response, click the **Standard Text** icon on upper right of the incident workspace.
   a. Click the **Standard Text** drop-down menu and select the standard text from the list.
   b. Click **Add to Message** to insert the selected standard text in the response.

8. To include a knowledge article in an incident response, click the **Search the Knowledge Base** icon on the right panel.
   a. Type the search criteria and select the appropriate filters, then click **Search**.
   b. Select the answer from the list of results to insert the answer in the response.

9. To include an image in the incident response, copy the image and then click the **Paste** icon on the HTML editor.

10. 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 New Note or Customer Entry and select an option from the drop-down menu.

• To move the response to the message list and save the record, click Save on the incident toolbar.

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

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

13. To send the draft response message, select the message and 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.

14. Click Save and Close.

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 File Attachments icon on a response thread header.

   ✷ Note: The File Attachments icon does not appear on a response thread header when no attachments were included.

   A list of attachments sent with the response is displayed.

3. Select an item 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.

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.

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 Agent Browser UI incident workspace **Actions** menu or **Quick Action** area using the workspace designer on the Service Console.

**Steps**

1. Click the **Actions** drop-down menu and select **Forward**.
   
   If there are existing incident attachments, they will be listed under **Attachment(s)** in the **Comments** section.

2. Type the email address in the To field or select one or more email addresses from the list. You can search for recipients by typing all or part of a name or email address and then pressing **Enter**. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results.

3. To add Cc or Bcc recipients, click **Cc** or **Bcc** and type the email address in the Cc field or select one or more email addresses from the list. You can search for recipients by typing all or part of a name or email address and then pressing **Enter**. If a match is found, it populates the field. If more than one record is found, select the record from the list of search results.

4. Edit the **Subject** field, if needed.

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

6. To include a bookmark to the incident in the **Comments** field, click the **Bookmark** icon at the bottom of the window.

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

7. To set **Exclude Notes** and **Send Contact Information** options, click the **Options** drop-down menu and do one or more of the following:
   
   - To prevent private notes from being forwarded with the incident, select the **Exclude Notes** check box.
   
   - To include the contacts associated with the incident, select the **Send Contacts** check box.

8. To add or remove existing attachments or add a new file to the forwarded incident, click **File Attachments** 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. You can remove all existing attachments by clicking Remove All to the right of **Attachment(s)** in the **Comments** section.
   
   - 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.

9. Click **Send**.

**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 on the Service Console, 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 tool panel.

**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 on the Service Console.

**Steps**

1. In your incident response, position the cursor where you want to insert the standard text.
2. Click the **Standard Text** icon on the upper right of the incident workspace to open the **Standard Text** tools panel.
3. Click the **Standard Text** drop-down menu to view the titles of the configured standard text items. To narrow the list of items displayed, begin typing the item name in the search box.
4. Click on an item to display it in the **Preview** field.
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 was inserted.

8. Click the **Standard Text** icon 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

If you know the hot key sequence for the standard text you want to insert, you can type it without opening the Standard Text panel.

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.
4. Press **Enter** 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

Search the knowledge base

As you respond to a customer’s question, you might remember answers that address similar issues.

Prerequisites

Rather than conducting a time-consuming hunt of the knowledge base to find the relevant answers, Service lets you search for specific answers.

Steps

1. In your incident response, position the cursor where you want to insert the answer.
2. Click the **Search the Knowledge Base** icon on the upper right of the incident workspace to open the Search the Knowledge Base tools panel.
   
   By default, the subject of the incident you are working on displays in the Search field.
3. Leave the subject of the incident or type a new search and click **Search**.

   > **Tip:** You can refine your search by searching for a phrase, exact search, or complex expression, and specifying filters including date, product, category, access level, and status.
4. Locate the answer you want to include in the response and do one of the following:
   
   - Click the **Add as Link** icon to insert the answer as a link. The subject of the answer will display as a link in the response.
• Click the Add as Text icon to insert the answer as text. The Summary, Question, and Solution content of the answer will display as text in the response.

5. Click the Search the Knowledge Base icon to close the Search the Knowledge Base tools panel.

Delete an incident

If your profile gives you permission to delete incidents, the option to delete is available on the toolbar and from the Actions menu. When you delete an incident, you permanently remove it from the knowledge base.

Steps

1. Choose one of the following:
   • To delete an incident when the incident is open, click Actions and select Delete. A message prompts you to confirm deletion of the incident.
   • To delete an incident from an incidents report, right-click the incident and select Delete - Incident.
2. Click Yes to delete the incident.

Reassign or re-queue an incident

You might need to assign incidents from your inbox to another staff member or move them back into an incident queue.

The following situations commonly require you to move incidents, although your manager may have other guidelines as well.

• You log out for the day—To avoid having unresolved incidents sitting in your inbox when you leave for the day, you might want to assign them to another staff member or place them back in a queue.

• You are assigned an incident you should not have received—When an incident is incorrectly assigned, you can assign it to another agent or group or move it to the correct queue.

Steps

1. From an incidents report, right-click the incident and select Open - Incident.
2. Choose one of the following:
   • To reassign the incident, click the Assigned drop-down menu and select the appropriate group or staff member.
   • To re-queue the incident, click the Details tab, click the Queue drop-down menu, and select the appropriate queue.
3. Click Save and Close to reassign or re-queue the incident.
   The incident is moved from your inbox to the agent inbox or selected queue.
About Knowledge Advanced in the Agent Browser User Interface

Support agents, authors, knowledge managers, contributors, and administrators can use Knowledge Advanced in the Agent Browser User Interface.

Authors, knowledge managers, and knowledge base contributors can use Knowledge Advanced Authoring features to create and manage content and perform content-related tasks. Administrators can manage content, users, and other aspects of the knowledge base.

Support agents can use Knowledge Advanced in the incident workspace to find answers to customers' questions, retrieve recommended answers, add bookmarks to frequently-used answers, recommend additional information to answers, and access related articles. This section describes how to use Knowledge Advanced in the Agent Browser UI incident workspace.

Knowledge Advanced Authoring in the Agent Browser UI is identical in appearance and functionality to Authoring in the Service Cloud Console. See Administering Knowledge Advanced and Using Knowledge Advanced, located on the Oracle Help Center's Oracle Service Cloud Books page for more information.

About recommended articles

When you use Knowledge to help resolve an incident, Knowledge Advanced automatically performs a search based on the subject of the incident, and displays the results as recommended articles. Knowledge Advanced also uses the products and categories that are specified in the incident as additional search criteria.

To view recommended articles for an incident, select the Recommended Articles icon to open the Knowledge panel in the upper right of the incident page.

The Knowledge panel opens and lists the recommended articles. The maximum number of recommended articles is determined by your application administrator.

Articles can be internal or external, depending on their source. Internal articles are those that are created and managed within Knowledge Advanced Authoring. External articles are web documents that are included in Knowledge Advanced content collections.

You can open an article for viewing by clicking on its title. You can paste an article as a link or text within a customer entry, response, or private note, and add frequently used articles as favorites.
Searching the knowledge base

You can search for articles in the knowledge base. To search for articles:

1. Select the Search icon in the Knowledge panel.
2. Enter the search term.
3. Select the language of the articles you want to search.

The application returns a list of articles, with the best answers listed first.

You can open an article for viewing by clicking on its title. You can paste an internal article as a link or text within a customer entry, response, or private note, and add frequently used articles as favorites.

About linking articles

You can provide internal articles directly to customers by using the Add Link and Add Text features within the incident's customer entry, response, or private note text areas. The Add Link feature adds the article as hypertext link to the incident text area. The Add Text feature copies the article contents into the incident text area.

To add an article as a link, click the link icon next to the article title. To add an article as text, click the text icon next to the article title.

About Favorites

You can use Favorites to bookmark frequently-used or other important articles so that you can easily locate them when necessary. To add an article as a favorite, click on the favorites icon to the right of the article title in the recommended articles or search results list.

You can view and edit the list of favorites by clicking on the Favorites icon in the knowledge panel. To remove a favorite article from the list, click the favorites icon next to the title.
9 Working with Answers

About Answers

Customers use your site to find answers to their questions about the services and products your organization provides. To assist your customers in finding the information they are looking for, you can create answers to common questions and post them on your customer portal. As a result, you are able to provide a better customer experience because your customers are able to quickly find the answers to their questions.

Oracle Service Cloud provides you with the tools for creating and publishing effective answers. You can format answers to include links, tables, graphics, and other features, making your support site more interactive and visually appealing. In addition, Service provides you with a revolutionary method of knowledge base management that enables you to overcome the critical problems associated with a manually constructed knowledge base. Maintenance of your knowledge base is minimized because of automated processes that learn from customers using your site, then automatically rank answers and display the most useful answers first.

*Note:* To access answers on the Agent Browser User Interface you must use the November 2016 (or greater) version of Oracle Service Cloud as your base site.

Seeding your knowledge base

Service’s ability to start with only fifteen to twenty answers eliminates the need for a comprehensive initial knowledge set, which significantly speeds and simplifies the implementation.

Most organizations can build their initial seed content from existing online questions and answers, documents, or customer support interactions. Instead of constructing a complete set of answers up front, you can take advantage of the ongoing questions that your customers submit to capture real-world issues and provide solutions.

Defining a process for publishing and reviewing answers

Before you develop your knowledge base, it is important to understand the process for publishing answers.

Frequently, the need for a new public answer will arise from a question submitted by a customer. When agents resolve an issue and recognize the need for an answer, they can propose an incident (from the Service Console) to become a publicly viewable answer.

The following is a guideline to help your organization define a process for efficiently creating answers.

1. **Define an approval review process for new answers.** After an answer has been proposed for public use, you may want managers or staff members from other areas in your organization to review the information to ensure technical accuracy of the methods and procedures defined in the solution.

2. **Determine the audience of new answers.** Before publishing an answer, determine which interfaces and customers you want to be able to view the answer. You can control visibility with answer access levels, languages, products, categories, and conditional sections.

3. **Determine the display position of new answers.** You can set the position of a new answer relative to other answers on the Answers page on the customer portal. When adding or editing an answer, you can choose to place new answers at the top, middle, or bottom of the answers list, or fix them at the top, middle, or bottom. If you want to give added visibility to newly published answers, place them at the top and then allow their
historical usefulness to dictate their future placement. In this way, your customers are aware of new answers as you publish them.

4. **Notify staff of new answers.** Answer notifications are available by answer, product, category, or subscriber. Standard reports for answer notifications can be scheduled to be sent to other staff members and are located at Public Reports/Service/Site Reports/Answer Notifications.

After following these steps to identify your process for publishing answers to your customers and notifying staff members about new answers, you can begin creating answers.

**Creating effective answers**

Creating useful answers is a straightforward process with a few simple guidelines. By following these guidelines, you will enhance the search process for customers, allowing them to find pertinent information quickly without needing to do multiple searches.

A knowledge base containing well-crafted answers will also optimize the self-learning features of Service that continually index, group, link, and rank the answers in the knowledge base. These self-learning features are the backbone of self-service, enabling you to present the most historically useful answers first and to suggest answers related to the customer’s current question. In addition, effective answers will make your maintenance tasks easier as information ages and changes.

Use the following guidelines to create clear, focused answers:

- **Create one-topic answers**—Think of each public answer in your knowledge base as one topic or the answer to one question. When a customer comes to your site with a question, they want quick resolution. One-topic answers improve searching and grouping, which enable customers to easily find answers. One-topic answers provide brief, pertinent information without clutter. A knowledge base of unique answers also simplifies management and maintenance.

- **Provide adequate detail**—Because Service indexes the text of the Summary, Question, and Answer fields into words and phrases for text searching and answer grouping, answers should contain an adequate amount of text that explains the issue. With limited text, there are very few indexed words for the answer, and the words that are indexed cannot fully represent the context of the answer. As a result, the answer may be difficult to find during text searching. With too much text you run the risk of writing about several topics and covering too broad of a context. The resulting set of indexed words may not span the entire text of the answer. In effect, the answer can be found during dissimilar searches in which that answer is not relevant.

- **Write a concise summary**—The quality of the summary, meaning how closely it summarizes the contents of an answer, is critical to the effectiveness of the answer and affects its display position, how it links to related answers, and how it is grouped with similar answers. On the Answers page, customers will choose to open and read or skip over an answer based on the summary. Without a concise summary, customers may not open the answer, which directly impacts its display position and how it is linked with other answers. The summary should state what the customer can expect to learn by reading the answer or what question will be answered.

- **Create explicit keywords**—Sometimes, you might not be able to capture the entire contents of an answer in the one line summary. The **Keyword** field is an additional field, not viewable by customers, used during keyword indexing of an answer. You can enter supplemental keywords, phrases, or text that represent the answer’s contents. Keywords should be separated by commas, with grouped words separated by spaces (for example, “cell phones, calling plans, accessories”). You should be deliberate with the words you enter because they are weighted higher than indexed words and phrases not in the Keyword field. Be sure to include a thorough, yet concise section of keywords.

After creating a knowledge base of effective answers, you will want to publish the answers to be accessed by customers. By understanding the factors that determine answer visibility, you can effectively control how and when answers are seen on the customer portal.
Controlling answer visibility

Answers can be either public or private, as well as have specific visibility settings for each interface or for contacts based on access levels defined in their service level agreement (SLAs).

⚠️ Note: SLAs must be defined on the Service Console.

When you publish answers, you make them available to the public on your customer portal. Whether answers are visible on your customer portal is determined by what you specify in certain fields. The key fields and functions that determine how and where answers are presented are Answer Status, Answer Access Level, Language, Products and Categories, and conditional sections.

In order for answers to appear on the customer portal, the Status, Access Level, Language, Product, and Category fields must be set to a visibility that allows access by customers. If even one field does not allow visibility, the answer will not be available on the customer portal. In addition, if you have conditional sections within an answer with restricted visibility, that section must be assigned an access level associated with the answer.

- **Answer status**—The primary factor that determines the visibility of answers is answer status. There can be many custom answer statuses, but all must be either a Public or Private status type, which is determined when the custom status is created. Answers set to a status that has a Private status type can never be viewed on the customer portal, regardless of their access or language assignment. Public answers may be viewable through the customer portal, depending on the other fields selected. Two of the default answer statuses are Review and Proposed, both of which have a Private status type. Since the Proposed status is a Private status type, the answer will not be visible to customers. An answer changes to the Review status when its solved count reaches zero or when the Review On date, specified when adding or editing an answer, is reached. The Review status will automatically remove the answer from the customer portal.

- **Answer access level**—Access levels determine whether customers can view answers on a per-interface basis. If an answer is set to an access level that has customer visibility on one of the interfaces, then that answer is viewable by everyone on that interface, provided the remaining fields also allow visibility. If an access level does not provide visibility to customers for a certain interface, access can still be given to specific contacts by assigning them SLAs that allow privileged access. One of the default access levels for answers is Everyone. This access level allows all customers to have access to the answer on all interfaces.

- **Language**—Answer visibility is also determined by the language assigned to it. If assigned to a specific language, an answer will only be visible on the interfaces using that language, as long as the answer status and access level also allow visibility.

- **Products and categories**—The visibility settings for the products and categories associated with the answer will also affect the visibility. If the answer is assigned to a product or category that is not visible to customers on a particular interface, the answer will also not be visible to customers, unless it is assigned to another product or category that is visible on the interface. In other words, if you have an answer that is assigned to two products, and one of the products is not visible on the interface, but the other product is, your answer will appear on the interface. However, if the answer is assigned to two products, and neither product is visible on the interface, your answer will not appear on the interface under any circumstances.

- **Conditional sections**—Conditional sections help control visibility of certain sections within an answer. If a section of the answer is assigned an access level that is not visible to customers on a particular interface, but the answer is visible, then customers are able to view the answer but not the conditional section.

Troubleshooting when answers are not visible

If an answer (or section within an answer) you want to be accessed by your customers is not appearing on the customer portal, answer the following questions to troubleshoot the problem.

- Is your status set to Public or a custom status with a status type of Public?
• Does the access level have visibility for the desired interface?

• Is your language for the answer appropriate? If you have more than one interface with multiple languages, is the answer set to the same language as the interface you are trying to view it on?

• Are your products and categories visible on the interface? Is your answer assigned to at least one product/category that is visible to customers?

• Are the answer sections within the answer visible as you intended?

If the answer to any of these questions is no, make the appropriate changes and check again to see if the answer appears. If you are unsure of the answer to any of the above questions, contact your administrator.

Maintaining your knowledge base

Many of the maintenance tasks related to organizing the answers in your knowledge base are automated. This enables you to focus on improving and maintaining the content of answers.

The following list outlines the automated processes and describes the tools designed to aid with answer management.

• **Aging of answers (solved count)**—Just as frequently used answers will rise to the top of the knowledge base, lesser-used answers will move to the bottom.

• **Answer review and publish feature**—By defining review and publish dates, you can easily establish a regular timeline for monitoring answers. When you set the Review On field under the Details tab, the answer is automatically set to the Review status when the solved count reaches zero or on specifically defined dates. In addition, you can set the Publish On field to a date in the future. In this way, you can schedule an answer to become public automatically without having to publish.

• **Data mining**—The processes of linking similar answers for the Related Answers feature is triggered automatically and occurs periodically when modifications are made to the knowledge base. These processes implement innovative technologies to cluster and link answers containing similar content.

• **Customer feedback**—Service closes the loop by providing customers with a method to submit comments and suggestions on answers. Any feedback submitted through the question, “Is this answer helpful,” is turned into a Feedback for Answer incident accessible to agents. You can use this feedback to address content holes and improve answers.

• **Customer visit tracking**—Service tracks customers’ actions as they move through your support site, recording where they went, what they searched for, and the answers they viewed. Using the Web Visit feature, agents can view this click-stream data to respond more appropriately to customers’ questions. This information can also indicate areas of the knowledge base that need to be tuned.

• **Knowledge base reports**—A series of standard reports record how customers are navigating the knowledge base, including the products and categories they are searching on, the search text they are entering, and the answers they are viewing. These reports provide a unique and powerful perspective into how the knowledge base is performing and enable you to pinpoint weak areas and tune the knowledge base content.

Evaluating customer feedback

Your customers can provide feedback on answers that do not completely solve their issues by answering the question, “Is this answer helpful?”

This feedback can be extremely valuable for understanding customer needs and updating your answers accordingly. When a customer submits comments or suggestions from the feedback form, an unresolved incident is automatically
created. In some instances, customer feedback can be incorporated directly into an existing answer. In other cases, new answers may need to be created.

**Reviewing answers**

Over time, the content of your answers can become outdated. Consequently, reviewing answers should become a central part of maintaining your knowledge base to ensure that the content is current, relevant, and useful. You may want to review answers at set intervals, such as every six months, or review answers in conjunction with new product releases or upgrades. If you have a group of answers for a particular product or service, you may want to review the answers in bulk. This can help you develop and prepare information in advance.

By using custom fields, custom answer statuses, and answer access levels, you can easily sort and work on answers in different stages of editing. For example, your administrator may have created a private answer status called Manager Review for newly crafted answers that will require manager approval before being published.

When editing an answer, you can set a specific date to review a particular answer. On the review date, the status of the answer will change to Review. Also, by default, if an answer is not viewed by customers, the answer’s solved count will reduce to zero, and the status of the answer will change to Review.

**Tip:** To maintain information about a particular topic in one answer, use the Notes tab to store upcoming information or material you are currently editing.

**Identifying content holes**

You should actively investigate material for new answers by reviewing recently submitted incidents. Agents may become overwhelmed with assistance requests, and despite their best intentions, they may forget or not have enough time to propose new answers. By continually capturing questions submitted by your customers and crafting new answers that solve those questions, you can publish answers for the most relevant and current issues.

As you search the most recently solved incidents, click the Web Visit tab to see if customers searched or viewed any answers before submitting their incident. In this way, you can locate answers that are incomplete or need updating.

**Evaluating answers using service analytics**

Several standard reports, available on the Analytics tab, track customer activity and provide data on the effectiveness of your knowledge base.

The Analytics tab on the answer workspace displays reports about the answer currently being viewed or edited. The reports are located at Public Reports/Service/Site Reports/Actionable Knowledge Foundation. By reviewing the reports, you can fine-tune individual answers to make them more relevant for the customer portal and ultimately improve customer satisfaction.

By default, the following reports display.

- **Answer Usage**—This report provides contact usage details on a per-answer basis.
- **Answer Click-through Rate**—This report provides a list of customer portal pages and actions and details about the visits for each.
- **Answer Effectiveness**—This report provides details about the actions performed on individual answers to provide an overall assessment of how effective each answer is.
- **Escalation Details per Answer**—This report provides information about the escalations that occurred after a particular answer was viewed.
Answers overview

One of the greatest ways you can improve the customer experience is to have answers to common questions readily available on your support site. You can create answers about your services and products and post them on your site. You can also create public answers from incidents in your knowledge base.

Once an answer is in your knowledge base, you can make edits any time, ensuring your knowledge base contains only the most up-to-date information. For example, you can define specific dates to review an answer. You can format answers with the HTML editor, which lets you create links, tables, and graphics, and use other HTML features without prior HTML knowledge. As a result, your support site is more interactive and visually appealing.

Answer reports

When you expand Answers on the Navigation Menu, the navigation list displays all of the reports and items added by your administrator. Everything you have access to from the Navigation Menu is part of the navigation set defined in your profile.

The answer information displayed on the content pane depends on the answers report you open and which fields were defined when the report was created. The Answers Default report, for example, displays the answer ID, summary, language, access level, status, assigned staff member, and date the answer was last updated. You can use the toolbar to manage answers or you can right-click any answer and select the same functions that are available on the toolbar.

Tip: Besides selecting an answer from a report, you can search for answers from a report or use the Quick Search in the global header if an answer report is defined in your Quick Search.

Answer workspace

The answer workspace defines which fields are available, what icons display on the toolbar, and how the information is organized on the content pane.

Your organization may use the default answer workspace or your administrator may have created one or more customized workspaces. Your profile defines the workspace you see when you work with answers. Keep in mind that the workspace your profile uses may display a different combination of icons and fields, or it may display them in a different location on the content pane.

Answer Toolbar

A standard toolbar exists for working with answers. The following table provides a description of the icons available by default on this toolbar.

<table>
<thead>
<tr>
<th>Group/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>Click this button to refresh the current answer.</td>
</tr>
<tr>
<td>Save and Close</td>
<td>Click this button to save and close the answer.</td>
</tr>
<tr>
<td>Save</td>
<td>Click this button to save the answer without closing it.</td>
</tr>
</tbody>
</table>

When you save an answer, it is evaluated by the rules engine. If your administrator added answer rules and the answer matches one or more of those rules, it is possible that the answer will be modified by rule actions when you save it. For example, a rule can change an answer status or answer access level.
## Record tabs

Record tabs contain fields and options for adding additional information to answers. The organization of these tabs allows you to manage and edit information and quickly move between the tabs as you work with answers. The information you can access on each tab depends on the permissions set in your profile.

**Note:** If you make changes to fields on any of the answer record tabs, you must save the answer for changes to take effect. If you close the record without saving changes, those changes are lost.

The following describes the supported tabs included on the answer workspace. If an unsupported tab displays on the workspace, that tab will not contain any content when you open it.

- **Summary tab**—Contains the fields for the answer subject, status, language, assigned staff member, and access level.

- **Content tab**—Contains fields for adding and editing answers, including keywords, and answer type. Also included is the HTML editor toolbar that lets you create HTML answers using basic word processing functions, as well as dynamic content, such as adding hyperlinks, images, tables, answer links, and conditional sections. You can also use source mode to type HTML code directly in the editor.

- **Products/Categories tab**—Lists all products and categories you can associate with an answer to enhance search results for customers.

- **Tasks tab**—Lists all tasks associated with the answer. The number of tasks associated with the answer displays in parentheses next to the tab name. For each task, the tab displays the task name, due date, completion date, staff member assigned to the task, and priority. You can open, copy, delete, print, and forward any task and mark tasks complete by clicking a button on the tab’s toolbar or by right-clicking the task and making your selection.

- **Details tab**—Contains the fields for answer details, including display position, review and publish dates, and subscriber notification options.

- **Attachments tab**—Lists all attachments associated with an HTML answer type including file name, size, date created and updated, description, and whether the file is set to private. You can also upload and download files, view and edit attachment properties, and delete attachments.

- **Audit Log tab**—Lists actions taken on the answer by staff members. Also displayed are automatic changes initiated by Oracle Service Cloud that resulted from the application of business rules. When an action is generated by the system, the Who field contains Administrator. You can also see who worked on the answer, when it was added or updated, the actions taken, and descriptions of the actions.
• **Notes tab**—Contains answer notes that can be sorted by date. Remember that customers never see the answer notes added by staff members.

• **Analytics tab**—Contains reports that display information about the answer being viewed or edited. By reviewing these reports, you can learn how your knowledge base is being used and make the necessary adjustments to improve customer satisfaction.

### Adding answers

When adding answers, you must complete key answer fields on the Summary tab used to specify the answer summary, status, language, access level, and the staff member assigned to the answer.

You must complete any required fields, marked with an asterisk, before you can save the answer. The key answer fields that display vary depending on the permissions set in your profile.

You can create different answer types when adding answers to the knowledge base. Answer types allow more flexibility in providing information to your customers. You can add the following types of answers.

- **HTML**—Answers that appear to customers as standard HTML on the customer portal.
- **URL**—Answers that consist of a link to an external URL. The URL address and the content of the web page are displayed.
- **File attachment**—Answers that appear as file attachments. File attachment answers link to information contained in another document and appear to customers on the customer portal as file attachments.

⚠️ **Caution:** When you change the answer type, certain fields are removed. For example, when you change an HTML answer type to a URL answer type, you will lose the Question, Answer, and File Attachment fields. Read the Confirm Answer Type Change prompt carefully before you continue.

### Add an answer

Follow this procedure to add an answer.

**Steps**

1. Click **Add a Record** in the global header and select **Answer**. A new answer opens on the content pane.
2. Complete the Summary tab fields described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Summary</td>
<td>Type the subject of the answer in this field. This field displays as the subject of the answer on the customer portal.</td>
</tr>
<tr>
<td>*Status</td>
<td>Click this drop-down menu to select an answer status. Available options are based on permissions associated with your staff account profile which is defined by your administrator.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>*Language</td>
<td>Click this drop-down menu to select a language.</td>
</tr>
<tr>
<td>Assigned</td>
<td>Click this drop-down menu to select a staff member to assign to the answer. Only staff members who have permission in their profile to create answers are listed. By default, the staff member who created the answer is selected.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip</strong>: To search for staff members, click inside the field and type all or part of the name. Results display in the drop-down menu.</td>
</tr>
<tr>
<td>Access Level</td>
<td>Click this drop-down menu to select one or more access levels.</td>
</tr>
</tbody>
</table>

1. To create answer content, click the Content tab. To define the answer type, and to create and format your answer content, click the Content tab.
   a. To add keywords, type the words in the Keywords field. Keywords should be separated by commas, with grouped words separated by spaces (for example, phone, call plan, nationwide). Keywords are used by the search feature. Any keywords you type are given the greatest weight when a customer is searching on the Answers page. In addition, words in products and categories and their descriptions are used as keywords for answers.
   b. To add notes specific to this answer, type in the Notes field. Keep in mind this field can be viewed by customers. Use the Notes tab for private notes.
   c. Select the answer type—HTML, URL, or File Attachment. HTML is selected by default. For details about creating answer content, refer to the following procedures: Adding HTML answers, Add a URL answer, and Add a file attachment answer.

   ➤ **Note**: If you change the answer type of an existing answer, certain fields will be cleared. In these cases, you will be asked to confirm your decision to change the answer type.

2. To associate products and categories with the answer, click the Products/Categories tab.
3. To add tasks to the answer, click the Tasks tab.
4. To add additional details to the answer, including setting Publish On and Review On fields, click the Details tab.
5. To attach files to an HTML answer type, click the Attachments tab.
   You can attach as many files as needed to associate with an answer. Attachments appear as clickable links when a customer views an answer. They can also be indexed as searchable text. Therefore, you can choose whether each document is indexed when managing your file attachments.
6. To view the answer audit log, click the Audit Log tab.
7. To enter notes about the answer, click the Notes tab.
   a. Click Add.
   b. Type the notes in the field that opens on the content pane.
   c. To specify a channel for the note, click the drop-down menu and select Phone, Fax, Post, CSS Web, or Email.
   d. Click Save.

   These notes are not visible to customers on the customer portal.
8. To view answer reports, click the Analytics tab.
11. To view the answer audit log, click the **Audit Log** tab.
12. Click **Save**.

**Result**
The answer is added to the knowledge base.

**Adding HTML answers**
You can use the HTML editor to design creative and eye-catching answers. You can design answer content using design mode or source mode. With design mode, you can create dynamic, well-formatted answers without previous HTML experience. You can include special formatting in your text and add graphics, links, and other HTML features. You can also add links that reference other answers. The HTML editor contains many of the same options available in basic word processing applications. With source mode, you can create answers using HTML source code.

For design mode to be available with the HTML editor, the profile assigned to your staff account must include the HTML Design Mode permission. For source mode to be available with the HTML editor, the Source Mode permission must be included in your profile permissions. Contact your administrator to address permissions associated with your staff account profile.

**Add an HTML answer in design mode**

You can use the HTML editor to design creative and eye-catching answers. Follow this procedure to add an HTML answer in design mode.

**Steps**

1. From the **Content** tab of an answer, select **HTML** as the answer type. HTML is the default answer type for a new answer.
2. Use the HTML editor to type the question portion of the answer under the Question tab. Functions available on the HTML editor include:
   - Cut, copy, and paste
   - Search for text
   - Undo and redo changes
   - Format text in numbered or bulleted lists
   - Adjust indentation
   - Center, left-justify, or right-justify text and images on the page
   - Switch to source mode
   - Change font style, size, and attributes (highlighting, bold, italic, underline)
   - Insert line breaks
   - Apply specialized formatting, including super and subscripts
   - Copy text formatting
   - Insert hyperlinks, images, tables, lines, special characters, and anchors
   - Insert dynamic content such as answer links and conditional sections
3. Click the **Answer** tab and use the HTML editor to create the answer content.
4. Click Save.

Add an HTML answer in source mode
Follow this procedure to add an HTML answer in source mode.

Steps

1. From the Content tab an answer, select HTML as the answer type. HTML is the default answer type for a new answer.
2. Under the Question tab, click Source on the HTML editor toolbar.
   For an existing answer, the HTML code displays on the content pane.
3. Type the HTML code to create or edit question content.
4. Click the Answer tab.
5. Click Source on the HTML editor toolbar.
6. Type the HTML code to create or edit answer content.
7. To exit source mode, click Source again. The HTML editor changes to design mode.
8. Click Save.

Add a URL answer
When you create a URL answer, customers can click the answer subject and they are automatically redirected to the defined URL, an external web page opens in a new window. URL answers are also indexed as searchable text on the customer portal. You can still define many of the same answer fields as you would when creating HTML answers. However, certain fields are unavailable when adding a URL answer.

Steps

1. Click Add a Record in the global header and select Answer. A new answer opens on the content pane.
2. Complete the fields under the Summary tab and other tabs as described in the Add an answer procedure.
   Note the required Summary field displays as the subject of the answer on the customer portal.
3. Click the Content tab and select URL. The Confirm Answer Type Change window opens.
   ▶️ Caution: Use caution when you change the answer type of an existing answer. Some fields are removed and cannot be restored (for example, the Question and Answer tabs as well as any file attachments added under the Attachments tab) when changing from an HTML answer to a URL answer.
4. Click OK in response to the Confirm Answer Type Change message.
5. Type or paste a URL address in the URL field.
6. Click Preview to display the URL link as it will appear in the customer’s web browser.
7. Click Save.

Add a file attachment answer
You can add file attachment answers to link to information contained in another document or file.
File attachment answers contain many of the same answer fields as in HTML answers. However, some fields are unavailable when adding file attachment answers. You can attach only one file for each file attachment answer type. The file in a file attachment answer is indexed as searchable text on the customer portal. Once you save your file attachment answer, you can download, view and edit properties, and delete the file.

**Note:** File attachment answers appear to customers on the customer portal as file attachments, which is different than HTML answers that contain file attachments within the answer to provide additional information.

### Steps

1. Click **Add a Record** in the global header and select **Answer**. A new answer opens on the content pane.
2. Complete the fields under the Summary tab and other tabs as described in the Add an answer procedure. Note, the required Summary field displays as the subject of the answer on the customer portal.
3. Click the **Content** tab and select **File Attachment**. The **Confirm Answer Type Change** window opens.

   **Caution:** Use caution when you change the answer type of an existing answer. Some fields are removed and cannot be restored (for example, the Question and Answer tabs as well as any file attachments added under the Attachments tab) when changing from an HTML answer to a file attachment answer.

4. Click **OK** in response to the confirmation message.
5. Click **Upload**. The **Upload Attachment** window opens.
   a. Click **Browse** to locate the file you want to upload.
   b. To define a label for the file as you want it to display on the content pane, type in the **Display Name** field.
   c. To define a description for the file as you want it to display on the content pane, type in the **Description** field.
   d. To prevent the attachment from being searchable, clear the **Indexed** check box. File attachments are indexed by default.
   e. Click **OK**.
6. Click **Save**.

   After you have uploaded a file, information about the file displays as described in the following table.

   **Table 16: File Attachment Answer**

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Displays the file name as defined on the Properties window.</td>
</tr>
<tr>
<td>Size</td>
<td>Displays the size of the file.</td>
</tr>
<tr>
<td>Created</td>
<td>Displays the date and time the file was attached.</td>
</tr>
<tr>
<td>Updated</td>
<td>Displays the date and time the file was last updated.</td>
</tr>
<tr>
<td>Description</td>
<td>Displays the description of the file as defined on the Properties window.</td>
</tr>
</tbody>
</table>
### Adding answer details

The Details tab contains information associated with the selected answer. You can control the display position on the customer portal, notify subscribers of changes to the answer, and define the review and publish dates for the answer. The following table describes the fields on the Details tab.

#### Table 17: Answer Details Tab

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Display Position</strong></td>
<td>Click this drop-down menu to determine the answer's display position on the customer portal. Options include the following:</td>
</tr>
<tr>
<td><strong>Historical Usefulness</strong></td>
<td>Select this option to use customer feedback to adjust the ranking of the answer.</td>
</tr>
<tr>
<td><strong>Place at Bottom</strong></td>
<td>Select this option to place the answer at the bottom of the list by changing the score to be equal to the lowest answer score. The score is then adjusted as the solved count changes over time.</td>
</tr>
<tr>
<td><strong>Place at Middle</strong></td>
<td>Select this option to place the answer at a level that is 50% of the highest answer score. The score is then adjusted as the solved count changes over time.</td>
</tr>
<tr>
<td><strong>Place at Top</strong></td>
<td>Select this option to place the answer at the top of the list on the Answers page by changing the score to be equal to the highest answer. The score is then adjusted as the solve count changes over time.</td>
</tr>
<tr>
<td><strong>Fix at Bottom</strong></td>
<td>Select this option to permanently fix the answer at the bottom of the list on the Answers page by changing the score to be equal to the lowest answer score.</td>
</tr>
<tr>
<td><strong>Fix at Middle</strong></td>
<td>Select this option to permanently fix the answer at a level that is 50% of the highest answer score.</td>
</tr>
<tr>
<td><strong>Fix at Top</strong></td>
<td>Select this option to permanently fix the answer at the top of the list on the Answers page by changing the score to equal the highest answer score.</td>
</tr>
</tbody>
</table>
Managing answers

Although you can add many answers to your knowledge base as your organization provides new products and services, you might also spend a lot of time managing and updating your current answers.

You can add information to existing answers, adding links to other answers and adding conditional sections within an answer to control visibility of certain information. When adding and editing answers, the HTML editor toolbar allows you to perform advanced actions on your answers such as inserting hyperlinks, images, and tables. As your knowledge base grows more complex, you can insert links to other answers and associate answers with multiple access levels.

Associate an answer with multiple access levels

You can associate multiple access levels with an answer. If any of the access levels have customer visibility, the answer is visible on the customer portal. In addition, the answers returned in a customer’s search can be controlled by assigning the customer an SLA that allows privileged access to specific answers. For example, a customer assigned an SLA with Gold access is able to view all answers with the assigned access levels of Gold, Everyone, or Gold and Everyone.

Access levels are just one way of controlling answer visibility.

♫ Note: SLAs must be set up on the Service Console.

Steps

1. From the Summary tab of an answer, click the Access Level drop-down menu and select the check box next to each access level you want to assign to the answer.
2. Click Save.

Associate products and categories to an answer

You can associate products and categories with answers. By associating products and categories with your answers, you can facilitate rules and searching.

♫ Note: Regardless of whether product linking is enabled and regardless of what categories are linked to products, all products and all categories are available on the Products/Categories tab when you add or edit an answer.

Steps
1. From an open answer, click the **Products/Categories** tab. From an answers report, double-click the answer and then click the **Products/Categories** tab.

2. To associate products with the answer, click the **Products** drop-down menu and select the check boxes next to the products you want to associate.

   ☑ **Tip:** To search for a product or a category, click inside the field and type all or part of the product or category name. Results display in the drop-down menu.

   When you select a product, it displays in the Selected Items pane and is added to Products field.

3. To associate categories with the answer, click the **Categories** drop-down menu and select the check boxes next to the categories you want to associate.

   When you select a category, it displays in the Selected Items pane and is added to Categories field.

4. To edit or delete sub-product and sub-category associations, double-click the related product or category in the Products or Categories field and clear the check boxes next to the sub-products and sub-categories you want to disassociate.

   You can also use the Selected Items pane to change your associations.

5. To edit or delete an entire line of product or category associations, click the **Delete** icon next to the product or category in the Products or Categories field or in the Selected Items pane.

**Insert an answer link**

You can create a link in an HTML answer type that references an existing answer by using the answer ID number instead of typing a long URL to the answer.

**Steps**

1. From the Content tab of an answer, insert the cursor where you want the answer link to display, and then click the **Answer Link** icon on the HTML editor toolbar.

2. Enter the following field information:

   **Table 18: Title Window**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer ID*</td>
<td>Type the answer ID of the answer you want to link to.</td>
</tr>
<tr>
<td>Link Text</td>
<td>Type the text as you want it to display to customers.</td>
</tr>
<tr>
<td></td>
<td><em>If this field is left blank, Answer Link will display.</em></td>
</tr>
<tr>
<td>Title</td>
<td>Type the text you want to display when customers hover over the link.</td>
</tr>
<tr>
<td>Target</td>
<td>Select the target location where you want the contents of the link to display. Options include New Window, Same Window, Parent Window, and Browser Window.</td>
</tr>
<tr>
<td>Anchor</td>
<td>Type the anchor to link to a specific location in a long string of text in an answer. This allows customers to link to the exact location.</td>
</tr>
</tbody>
</table>

3. Click **OK**.
Result

The answer link is added to your content where the cursor is positioned.

Insert a conditional section

Conditional sections control the visibility of specific sections within your answers, allowing only customers with the appropriate SLA to view the conditional sections.

For example, when you are working on an answer and you want to add information that is not yet approved for public visibility, you can create an access level that has no customer portal visibility and assign it to the conditional section you do not want customers to see.

Conditional sections can also be used with privileged access levels assigned to specific SLAs. Those customers assigned an SLA with a privileged access level are able to view the conditional sections assigned to the privileged access level. For example, a customer assigned an SLA with Gold access is able to view conditional sections with access levels of Gold, Everyone, or Gold and Everyone. This provides more flexibility to customize and personalize answers for customers. Note that SLAs must be set up on the Service Console before access levels are available on the Agent Browser UI.

⚠️ Note: Conditional sections can also be nested. Although answers allow unlimited nesting levels, we strongly recommend limiting nesting levels to three inner sections.

Steps

1. From the Content tab of an HTML answer type, click the Answer tab on the HTML editor.
2. Click the Conditional Section icon on the HTML editor toolbar.
3. Select the access levels you want to assign to the conditional section.
4. Click OK.
   A conditional section text box displays on the content pane.
   When conditioning a section of an answer with an access level not associated with the answer, the section will never be visible to customers.
5. Type your conditional content in the text box.
6. Click Save.

Modify conditional sections

Follow this procedure to modify a conditional section.

Steps

1. From the Content tab of an HTML answer type, click the Answer tab on the HTML editor.
2. To edit the text of a conditional section, place your cursor inside the conditional section text box and make changes to your content.
3. To nest a conditional section in the current conditional section, click inside the answer section and then click the Conditional Section icon on the HTML editor toolbar.
4. To change the access level of a conditional section, double-click the conditional section to open the access levels.
   a. Select one or more access levels.
   b. Click OK to assign the selected access levels and close the window.
5. Click Save.
Result
If the answer contains conditional content and the customer has access to that level of privileged answer, the conditional content is visible on the Answers page.

Edit an answer
When you edit an answer, you can change the information in related answers, but keep in mind that editing answers can affect other answers associated with it.

This procedure assumes you are editing an HTML answer type.

Steps
1. From an answers report, double-click the answer.
2. To edit the question portion of the answer, click the Question tab and use the HTML editor to make changes.
3. To edit the answer portion of the answer, click the Answer tab and use the HTML editor to make changes.
4. To make changes related to other answer records, click the appropriate tab and edit the associated fields.
5. To notify answer subscribers of changes, click the Details tab and then click the Notify Subscribers drop-down menu to select from the following options: Do Not Notify, This Hour, End of Today, End of this Week, or End of this Month.
6. Click Save.

Insert a variable into an answer
Answer variables are predefined shortcuts for entering information into an answer instead of a long string of text. When an answer displays on the customer portal, the variable is replaced with whatever value was specified by your administrator.

Variables are also helpful to use for information that may change. When your administrator changes the value of the variable, all answers containing that variable will also change. Contact your administrator for a list of variables defined for your application. For example, if your administrator added a variable for a support email address at your organization called “contact,” you could insert the variable for the email address in the answer, such as $contact. If the email address changes, all answers containing the contact variable are updated.

Steps
1. Click the Question or Answer tab under the Content tab of an HTML answer and place your cursor where you want to insert the variable.
2. Type a dollar sign ($) followed by the variable name.

Note: Because variables are case sensitive, you must type the variable name exactly as it is defined.

Result
The assigned value displays when customers view the answer.
Delete an answer
You can delete answers when they become outdated.

⚠️ Caution: Deleting is permanent and cannot be undone.

Steps

1. Right-click the answer from a report and select Delete - Answer.
2. Click Yes to confirm.
10 Chatting with a Customer

Chat for agents

While self-service and email response management can solve the majority of customer issues, Oracle RightNow Chat Cloud Service (Chat) offers the best venue for certain queries, such as helping customers finalize purchases. As a chat agent, you can serve customers in real time through typed conversation.

When you need assistance with a chat session, you can conference another agent into a chat or transfer a chat to another agent. Both the conference and transfer features can be useful if another agent is more knowledgeable in a particular area.

Chat Live Media bar

Once Chat is enabled and your profile includes chat permissions, you can log in as an agent from the Live Media bar in the global header. With the Live Media bar, you can log in, log out, and set your status in Chat.

In addition, you can request and cancel chat requests.

The following table describes the options available on the Live Media bar. The status of the chat determines which icons are currently active.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logon</td>
<td>Click the key icon, Logon, to log in to Chat. The key icon changes to a lock icon when logged in. Click Logon again to log out of Chat.</td>
</tr>
<tr>
<td>Agent Status</td>
<td>Click the drop-down menu to select an agent status. Chat contains default agent statuses of Unrestricted and Unqualified. Your administrator can select Unrestricted as your default status. In addition, your administrator can add custom statuses and select any of them as the default.</td>
</tr>
<tr>
<td>Request Chat</td>
<td>Click the icon with an arrow, Request Chat, to request a chat. Click Request Chat again to cancel the request. By default, chats are pushed to you by the system. This icon is enabled only if Pull Chat permission is set in your profile and you are available to chat.</td>
</tr>
<tr>
<td>Enable Sound</td>
<td>Click Enable Sound to enable sound alerts whenever the chat is updated by the customer.</td>
</tr>
</tbody>
</table>
Log in to Chat

Log in to Chat.

Steps

1. Click Logon, the key icon, on the Live Media bar.
2. Click the Agent Status drop-down menu and select Unrestricted. Your administrator can configure your profile so that your status is Unrestricted by default.

Engagement panel

While chatting with customers, multiple chat agent tools are available on the engagement panel. The engagement panel is where you chat with customers.

- The Transcript section contains all chat correspondence between you and the customer. As text is sent from the customer, it appears in the Transcript section with a time stamp. After you send text to the customer from the Compose section, it is added to the Transcript section with a time stamp.
- The Compose section is where you respond to a customer during a chat session. When you are in transfer or conference consultation with another agent during a chat, use the shaded message area that appears for chatting privately.

The following table describes the icons on the engagement panel. The status of the chat determines which icons are currently enabled.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference</td>
<td>Click to conference another agent into your chat. Conference on your panel changes to a Change Lead Role icon when conferencing.</td>
</tr>
<tr>
<td>Transfer</td>
<td>Click to transfer the customer to another agent.</td>
</tr>
<tr>
<td>Terminate</td>
<td>Click to terminate the chat session.</td>
</tr>
<tr>
<td>Wrap-up</td>
<td>Click to conclude the chat and enter wrap-up mode. Wrap-up mode allows you to do any post-chat tasks before automatically receiving the next chat request.</td>
</tr>
<tr>
<td>Change Lead Role</td>
<td>Click to select the lead chat agent.</td>
</tr>
<tr>
<td></td>
<td>You must be involved in a conference session for this icon to be enabled.</td>
</tr>
<tr>
<td>Missed Message Counter</td>
<td>The counter indicates how many messages the customer has sent after your last response.</td>
</tr>
</tbody>
</table>
Interaction workspace

When a chat is initiated, the engagement panel opens along with an interaction workspace.

- **Interaction**—Contact information for the chat is created.
- **Incidents**—An incident for the chat is created if you have add/edit permissions for incidents.

Chat with a customer

If you are the agent receiving a chat request, you will receive a toast notification.

By default, the toast notification contains customer information, including the customer’s first and last names, and email address. The profile assigned to you by your administrator determines the behavior of the chat request, such as automatically declining a chat that you don’t accept within a specified time.

Steps

1. Click **Accept** on the toast invitation to accept the chat request and activate the chat session. An automatic greeting is sent to the customer and displays in the Transcript section.

   **Note:** If Sneak Preview is enabled, you see the customer’s entry in italics as it is being typed, allowing you to begin composing a response. Once the customer sends the message, the customer’s message changes from italicized to regular font. It is a best practice to wait to respond until the customer has sent the message. If you have multiple active chats, you will only see Sneak Preview for the chat in focus.

   Additional customer tabs will display if you are engaged in multiple chat sessions. To manage the individual chat sessions, simply click the appropriate tab.

2. Type your reply in the message text box in the Compose section.

   To copy and paste text, press **Ctrl+c** and **Ctrl+v**. To start a new paragraph, press **Shift+Enter**.

   As you type, an inline spell checker recognizes misspelled words and marks them with a red zigzag underline. Right-clicking the misspelled word presents a list of substitute words from which you can choose. You can also choose to add words to your spell check dictionary.

3. Click **Send** or press **Enter** to send your response.

   Your response is added to the Transcript section.

View incidents submitted by a customer

You can tailor your assistance to customers if you know what issues they are experiencing. For example, if a customer has an open incident in Oracle RightNow Cloud Service (Service), you can view the contents of the incident while chatting with the customer.

Steps

1. While chatting with a customer, select **Open** from the commands drop-down menu in the **Contact** field.
The customer’s contact record opens.

2. Click the **Incidents** tab.
   A list of the customer’s incidents appears.

3. Select **Open** in the Actions column of an incident to open it.

4. Close the contact after reviewing the customer’s current incidents.

**Open a contact record**

You can access additional information about the customer by opening the contact record from a chat.

For example, if the customer has a contact record in the knowledge base, you can see any organization association and where the customer is located.

**Steps**

1. Select **Open** from the commands drop-down menu in the **Contact** field. The customer’s contact record opens.

2. Close the record after viewing or editing the contact record as needed.

**Transfer a chat to another agent**

When necessary, you can transfer a chat to another agent during a chat session. This feature is helpful when another agent has more experience with a specific topic than you do.

**Steps**

1. At any point during your chat session, click **Transfer**. The **Select Names** window opens.

   Tip: Select **Transfer to Queue** if you are not aware of a specific agent who can accept the transfer. Chat will then route the chat to an agent in the queue.

2. When you see the agent you want to transfer the chat to, select the agent’s name and click **Request**. The agent receives a toast notification to accept, view, or decline the transfer request.

   - If the agent clicks **Accept**, the associated contact and incident are automatically saved and the chat is transferred to the agent.

   - If the agent clicks **View**, the toast invitation closes, the chat transcript appears on both of your workspaces, the Compose section indicates In Transfer Consultation, and a message area is shaded for private messaging.

You and the agent can chat before the other agent accepts or declines the transfer request. The customer cannot view messages sent in the shaded message area. If the agent clicks **Accept**, the associated contact and incident are automatically saved, and the chat is transferred to the agent. Once the transfer is made, the customer is notified that you left the chat and the new agent’s name appears in the chat transcript instead of your name. If the agent declines the conference, the chat stays with you.
Conference another agent into your chat

Agent conferencing is another way Service helps you provide superior service to your customers.

Conferencing can be useful when you want to include another agent in your chat session to help you solve a customer’s problem.

Steps

1. At any point during your chat session, click Conference. The Select Names window opens.

2. When you see the agent you want to conference into the chat, select the agent’s name and click Request. The agent receives a toast notification to accept, view or decline the conference request.

   • If the agent clicks Accept, the new agent is conferenced into the chat session. The chat transcript appears on both of your workspaces.
   
   • If the agent clicks View, the chat transcript appears on both of your workspaces, the Compose section indicates In Conference Consultation, and a message area is highlighted in blue for private messaging.

You and the agent can chat before the other agent accepts or declines the conference request. The customer cannot view messages sent in the blue private message area. If the agent clicks Accept to accept the conference, the new agent is conferenced into the chat session. If the agent declines the conference, the chat stays with you. Once the conference starts, you and the customer are notified. Each person can send text and all those in the conference can see the message text and the name of the person who sent it. The Leave icon is disabled because you initiated the conference. The agent you conferenced in must click Leave to exit the conference. You also have the option to assign the new agent the lead role in the chat by clicking Change Lead Role.

Wrap-up and terminate a chat session

Either you or the customer can end the chat session. If the customer ends the session, a message asks if you want to terminate or wrap up the session. Alternatively, you can click Wrap-up or Terminate to end the session.

By default, if you have add/edit permissions for incidents, an incident is created when a chat session begins and an Incident field displays as a key field containing the incident’s reference number. You can edit the incident while chatting with a customer.

Steps

1. To enter wrap-up mode, click Wrap-up.

   Complete any post-chat tasks. You can edit this incident in the same manner as any other incident, including changing the incident subject.

2. Click Terminate.

   The chat session closes and the chat transcript is inserted as a response thread on the Messages tab of the incident. The party that initially disconnected from the chat (customer or agent) is also identified in the response thread. In the event the incident with the chat transcript is emailed to the customer, private chat messages that took place between you and other agents during the chat are hidden to prevent customers from seeing them.
Chat for customers

The Chat page is the customer interface where customers chat with agents. Because the Chat page is integrated with the customer portal, it can be customized to suit your customers’ needs.

After customers submit a chat from the Live Help page on the customer portal, the Chat page opens. This page displays a wait time and queue position when customers are waiting to chat. In addition, customers can search the knowledge base for answers to their questions while they are waiting to chat with an agent.

The following figure shows the Chat page after an agent accepts a customer’s request to chat. What your customers see may be different if your administrator has customized this page.

The following table describes the options available on the Chat page.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Mute" /></td>
<td>Customers click this button to mute incoming sound notifications.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Customers click this button to print the chat correspondence at any time.</td>
</tr>
<tr>
<td><img src="image" alt="Send an Off the Record Message" /></td>
<td>Customers click this button to send unrecorded messages during the chat session. This button appears only during a chat session. Agents cannot send unrecorded messages to customers. If the chat session is saved as an incident, the unrecorded message displays as “&lt;username&gt;: Message Removed.”</td>
</tr>
<tr>
<td><img src="image" alt="Disconnect" /></td>
<td>Customers click this button to disconnect from the chat session. This button appears only during a chat session.</td>
</tr>
<tr>
<td><img src="image" alt="Close" /></td>
<td>Customers click this button to close the Chat page. This button appears only after a chat session is disconnected.</td>
</tr>
<tr>
<td><img src="image" alt="Attach File" /></td>
<td>Customers click this button to send file attachments during the chat session. This button appears only during a chat session and is not currently functional when chatting with an agent in the Agent Browser UI.</td>
</tr>
<tr>
<td><img src="image" alt="Send" /></td>
<td>Customers click this button to send messages to an agent. This button appears only during a chat session. Customers can also press Enter to send messages.</td>
</tr>
</tbody>
</table>
Chat with an agent

Customers chat with an agent from the Live Help page.

Steps

1. From the Live Help page, the customer fills in the required information and clicks **Submit Request**. The **Chat** page opens. While Chat searches for an available agent, the customer is placed in the wait queue and is provided with the estimated wait time and position in the queue.

   After an agent accepts the chat request, the status section changes from Searching to Connected, and the **Chat Dialog** section opens with a greeting from the agent.

2. The customer types a question and presses **Enter** or clicks **Send**. The customer’s question is added to the **Chat Dialog** section.

3. The agent responds to the customer. The agent’s response is added to the **Chat Dialog** section.

4. After receiving an answer to the question, the customer clicks **Disconnect** to terminate the chat session. The agent is notified that the customer has disconnected.

5. The customer clicks **Close** to close the **Chat** page and return to the Live Help page.

Chat customer reconnect

In the case of a crashed browser or otherwise improperly terminated chat session, the chat reconnect feature allows customers to reconnect to their previous chat session.

When customers are unintentionally disconnected from a chat and attempt to chat again, they receive a message stating that an existing chat session was found and are given the option of resuming that session. Upon reconnecting to the chat session, the **Chat** page is populated with all chat correspondence that was present before the chat became disconnected, and customers can resume the chat session where they left off without having to wait in a chat queue.
Co-browsing with a Customer

Co-browse with a customer from an incident workspace

With co-browse, you can guide a customer through a web page using your mouse or other pointing device to demonstrate actions.

In effect, you take control of the customer’s web browser to show the customer how to complete an action. Co-browse helps eliminate the confusion that can arise when giving verbal instructions and is effective for assisting customers in filling out forms or completing a sale.

> Note: Co-browse must be enabled before you can begin a session with a customer. In addition, you can engage in only one co-browse session at a time.

Steps

1. While speaking with a customer on the telephone, direct the customer to the location of the co-browse link on your customer portal and instruct the customer to click it. A message notification opens and provides the customer with an access code number.

2. With the customer’s incident open, click the Co-browse tab. The co-browse login page displays and your Oracle Service Cloud login name appears in the Agent Name field.

3. Ask the customer for the secure session ID number and type it in the Access Code field.

4. Click Connect. The co-browse toolbar displays and the co-browse session begins. The following table describes the options on the co-browse toolbar.

<table>
<thead>
<tr>
<th>Table 22: Co-browse Toolbar Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Button/Field</strong></td>
</tr>
<tr>
<td>Mode</td>
</tr>
<tr>
<td>View Only</td>
</tr>
<tr>
<td>View + Pointer</td>
</tr>
<tr>
<td>View + True Pointer</td>
</tr>
</tbody>
</table>
### Button/Field Description

<table>
<thead>
<tr>
<th>Button/Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full Control</strong></td>
<td>Select this option to view the customer’s desktop, control all mouse or other pointing device functions (pointer and mouse clicks), and use your keyboard to enter information on the customer’s desktop (for instance, to help the customer fill out a form).&lt;br&gt;  In Advanced Mode, this option also allows you to navigate to other company web pages.</td>
</tr>
<tr>
<td><strong>Advanced Mode</strong></td>
<td>Select this option to escalate to the Advanced co-browse state with access to the customer’s entire desktop and to co-browse with View + True Pointer and Full Control in Advanced mode.</td>
</tr>
<tr>
<td><strong>Client Info</strong></td>
<td>Displays the customer’s environment information for operating system, browser version, client version, and escalation mode.</td>
</tr>
<tr>
<td><strong>Disconnect</strong></td>
<td>Click this button to end the co-browse session.</td>
</tr>
<tr>
<td><strong>Connection Quality Information</strong></td>
<td>Displays the strength of the connection in a bar graph.</td>
</tr>
<tr>
<td><strong>Zoom In</strong></td>
<td>Click this button to zoom in on the customer’s desktop.&lt;br&gt; This button is available only in Advanced Mode.</td>
</tr>
<tr>
<td><strong>Zoom Out</strong></td>
<td>Click this button to zoom out on the customer’s desktop.&lt;br&gt; This button is available only in Advanced Mode.</td>
</tr>
</tbody>
</table>

5. **Click Disconnect** to end the co-browse session. Both you and the customer are notified when the co-browse session ends. The customer can also disconnect from the co-browse session at any time.
Collaborating with other agents

Service Collaboration lets agents collaborate with other agents to more quickly resolve customer questions. If Service Collaboration is enabled, you can create conversations containing the details of your findings and post questions to other agents.

Click on the Service Collaboration control on your custom incident workspace.

If your administrator has added the My Incident Conversations item to your navigation set, you can have quick access to all conversations in which you are participating. Agents can customize their toast preferences for OSN notifications.
13 Monitoring Social Channels

Social Monitor Overview

To extend great customer experiences across social media channels and protect your organization’s valued reputation, it is essential to employ a social media strategy that includes monitoring, and sometimes participating in, conversations in the social cloud.

With a growing portion of the world’s population now depending on social media like Twitter and Facebook for communicating with friends and colleagues, it has become crucial for organizations to monitor the dialogue about their products and services that is taking place on the social web. The power of customer perspectives multiplied through social channels can have a dramatic impact, be it harmful or helpful, on business revenue. You cannot respond to RSS feeds or YouTube posts through Oracle Service Cloud. However, you can create incidents from them, which can be helpful for other business purposes.

Using Oracle RightNow Social Monitor Cloud Service (also known as the social monitor), you can interact with your customers by searching social media services, create incidents in Oracle Service Cloud, and include social media in your Oracle RightNow Outreach Cloud Service and Oracle RightNow Feedback Cloud Service messages. You can improve customer experiences by identifying trends in customer issues and opinions, and proactively communicate with customers through social channels using incidents.

Note: The social media services described here are not provided by or affiliated with Oracle. To obtain support or information about terms and conditions for any of the services mentioned, contact the service provider.

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 the 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 Social Monitor reports. The following reports are supported on the Agent Browser UI:
  - Social Monitor Search Results
  - Social Monitor New Results
- Create incidents from social cloud results.

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, direct messages and @mentions.
- Monitor and respond to customer responses on existing incidents.
Create an incident from a social cloud result

When you create an incident from a social channel, the content of the post is added as a customer thread entry.

Prerequisites

Your profile settings must include add/edit incident permissions.

Steps

1. Open a cloud search report.
2. Select the post you want to create an incident from in the search results list.
3. Click Create Incident.

A new incident opens. The content of the post is added as a customer entry on the Messages tab. By default, the incident subject field will contain the name of the channel and the leading text of the post, together exceeding no more than 240 characters.

Only one incident can be created from a post. If an incident has already been created for the post, the Create Incident icon is not active.

Responding through social channels

Oracle Service Cloud tracks each incident’s originating channel and selects the same channel by default when you send a response.

Each response is posted back to the contact using the unique messaging conventions of the originating media service. For example, when an agent responds to a Facebook or Twitter post and leaves the incident set to a non-Solved status, and the customer replies publicly through the same channel, the reply is automatically appended to the incident thread. You can also respond through Twitter when the customer hasn’t originated a social channel post if they have a channel account associated with their contact information.

Note: You cannot respond to RSS feeds or YouTube posts through Oracle Service Cloud.

In Facebook, social conversations take the form of posts and comments on pages. When you respond to a post on your organization’s Facebook page, the response appears as a comment beneath the customer’s post. The post is attributed to the name of the Facebook page designated by the channel account, rather than the agent’s name.

Twitter posts, called “tweets,” are short messages designed mainly for public, one-way communication to a group of followers. Tweets are posted publicly to Twitter’s vast global feed, where they can be accessed by anyone. Because tweets are public and indirect, using Twitter as a channel for business communication presents a significant challenge. Although the social monitor can track customer replies to your messages and append them to an incident as an ongoing conversation, those back-and-forth communications can be read, reposted, and replied to by any other Twitter user. For this reason, using public tweets to resolve sensitive service issues can be risky. To more successfully engage with customers using the Twitter channel, you should advise them to use Twitter’s private messaging feature, which is also supported by the social monitor. Private messaging is an alternate, direct messaging feature that makes interactions more secure by keeping them out of Twitter’s public feed.

Note: In order to receive private Twitter messages from anyone, you must select the Receive Direct Messages From Anyone setting in the security and privacy settings of your organization’s Twitter accounts. Your Twitter accounts can respond privately to anyone that sends a private message.
Respond with a Facebook or Twitter post

You can respond to incidents created from customer posts on your organization’s Facebook fan page and from public and private Twitter posts.

Steps

1. Open the incident created with the details of the post.
2. Click the Messages tab.
3. In the Compose Response area, click the Respond As drop-down menu in the header of the response thread if your site has more than one channel account.

   When you reply to a private Facebook message, your reply will be sent as a private message unless you clear the Send Private check box. A private conversation must be initiated by the Facebook user.

   If the customer’s Twitter account is following your organization’s Twitter account, the Send Private check box will be visible and selected by default. You can clear this check box to post the message to the public feed. However, you should always send messages privately whenever the option is available. The channel account you respond from must include Private Message Response permissions.

   If the customer’s account is not following your organization’s account, the Send Private check box will not be shown and all sent messages will be public.

4. If your organization’s Twitter account is not yet following your customer’s Twitter account, click the Follow button. Following the customer’s account will allow the customer to send private messages to your organization’s account.

   ✍️ **Note:** Depending on the security and privacy settings of your organization’s Twitter accounts, you may receive private Twitter messages from anyone. Your Twitter accounts can respond privately to anyone that sends a private message.

5. Type your response in the Compose Response area. A character counter appears if you are responding with a Twitter public response, which Twitter limits to 140 characters.

6. Click Send in the Actions menu.
Glossary

**absolute time**
An exact date and time defined in an escalation action for business rules or a comparison period for custom reports. In standard reports, absolute time is the amount of time passed based on a 24-hour clock. See also relative time.

**access level conditional section**
A method of controlling the visibility of a portion of an answer. Only those customers with permission to view the access level assigned to the answer section can view it.

**accessibility**
The characteristics of a website that allow all users, regardless of disability, to have complete access to the information and features of the site.

**accessibility interface**
A non-graphical interface in Oracle Service Cloud that allows staff members to add and edit incidents, answers, contacts, and organizations. The interface is accessible to blind and limited-sight staff members through keystroke functionality, screen magnification, and the ability to be read aloud by screen-reading software.

**account self-service**
A feature for staff members to get help when logging in to the administration interface. If staff members forget their login information, they can request their user name or password by clicking Login Help on the Login window. Account self-service can also be set up to open the login procedure in online help or to convey an alternate message.

**action**
The part of a business rule that defines what happens when an object (answer, contact, incident, chat session, opportunity, organization, target, or task) meets the rule’s conditions. Actions are also a part of script and workspace rules, and a component of campaigns that can perform one of several functions.
**action arrow**

An arrow on a workspace field or control that displays available editing options.

**activate**

A process that is manually run after making changes to a state, function, or rule in a rule base to check for errors, archive the current rule base, and convert the edited rule base to the active rule base. See business rules.

**Active**

One of the default opportunity statuses and status types. An opportunity with the Active status is currently advancing in the system toward a sale.

**add-in**

A custom .NET component that is loaded and activated by Oracle Service Cloud to add new features and integration capabilities.

**Add-In Manager**

A utility for adding, updating, and deleting add-ins in Oracle Service Cloud. The Add-In Manager is also used to set add-in permissions for each interface.

**administration interface**

The graphical user interface that staff members use to configure and manage Oracle Service Cloud. See also agent desktop and Service Console.

**administrator**

A staff member who configures, customizes, and maintains an Oracle Service Cloud application.
**administrator login**

The default login used by the administrator to download Oracle Service Cloud and log in the first time. This special login is not a defined staff account and has no navigation set or profile associated with it. Using this login, the administrator must create a navigation set, profile, and staff account in order to access all functionality. See navigation set, profile, and staff account.

**administration site**

See Customer Portal Administration site.

**advanced mode**

A survey editing mode for creating detailed questionnaires using an extended feature set that includes survey branching and automation elements.

**Agedatabase**

A scheduled utility that operates on the knowledge base data to maintain dynamic answers and make searching more efficient for staff members and customers.

**agent**

A staff member who may be assigned incidents and chats with customers, and who may also maintain contact and organization records.

**agent desktop**

The graphical user interface that staff members use when working with records, mailings, surveys, campaigns, and standard and custom reports. Agent desktop also refers to a set of complementary features in Oracle Service Cloud, including workspaces, workspace rules, guides, agent scripts, script rules, workflows, and add-ins, each representing a different, powerful way of interacting with records in the knowledge base. While each component serves a distinct purpose, they can be used together to create a highly adaptive work environment. See also administration interface and Service Console.
agent scripting

A feature that helps guide staff members as they enter information into records on workspaces. See also script.

aging

An automatic process that reduces an answer’s solved count as the frequency with which the answer is viewed by customers declines. As the solved count is lowered, the answer will move down the list of answers and be less visible to customers.

alias

A word that represents another word or phrase. Aliases and the words or phrases they represent can be added to the synonym list to enhance customer searching. See wordlist file.

anchor

A node on an action or decision in a campaign used to create a path. Actions and decisions have anchors for incoming and outgoing paths. Anchor also refers to a destination for hyperlinks placed at locations within documents for use in mailings and questionnaires for surveys and in answers when linking to other answers.

answer

Any knowledge base information that provides solutions to common customer support questions.

answer access level

A method of controlling what information is visible to customers. The default answer access levels are Help and Everyone, and custom access levels can be added.

answer custom field

A field for gathering and displaying additional information about answers. Answer custom fields appear when adding or editing an answer and on the Answers and answer details pages.
answer relationship

The relationship between two or more related answers. Answer relationship types include sibling, manually related, and learned link. Sibling and manually related answer relationships are defined by staff members. Learned link answers are automatically defined through customer activity. See learned link, manually related answer, and sibling answer.

answer status

A method of controlling the visibility of an answer. The default answer statuses are Public, Private, Proposed, and Review, and custom answer statuses can be added.

answer status type

The status of an answer that determines whether it can be viewed by customers. The default answer status types are Public and Private.

answer type

The format in which answers are displayed to customers. Answer types include HTML, URL, and file attachment. See File attachment answer, HTML answer, and URL answer.

answer update notification

A way for customers to sign up to be notified whenever a particular answer is updated. Customers can also sign up for notification whenever any answer associated with a specific product or category is updated.

Answers page

A page on the customer portal where customers can view answers and search the knowledge base. Customers can view individual answers or search the knowledge base using selection criteria to narrow their search. If additional elements are enabled, customers can also search documents, websites, and communities. See also Web Indexer and Oracle RightNow Social Experience communities.
API (application program interface)

An interface that enables programmers to communicate with the Oracle database. The API includes functionality to create, update, delete, and retrieve answers, contacts, hierarchical menus, incidents, opportunities, organizations, quotes, SLA instances, staff accounts, and tasks.

application menu

An interface element containing a list of options for working in Oracle Service Cloud, including access to other areas of the product and shortcuts for adding records and items to the knowledge base. The application menu also contains options for changing personal settings and password and customizing the content pane and navigation pane display. Staff members can also exit their application from this menu. See file menu.

Ask a Question

A page on the customer portal where customers can submit a question when they cannot find an answer in the knowledge base.

asset

Any product or service associated with an organization’s customers. Assets can require serial numbers or not and can be registered by customers on the customer portal or by agents on the agent desktop.

asset product

Any product or service sold or provided by an organization that can be tracked in Oracle Service Cloud. Asset products are configured using the product catalog.

asset record

Information about a specific product or service provided to a specific customer that is tracked and maintained in Oracle Service Cloud.
audience

All of the contacts belonging to the lists and segments associated with a mailing or survey. See also contact list and segment.

audit log

A list of all the actions performed on a report, record, or item in the knowledge base, including who performed the action, what the action was, and the date and time of the action.

auto filter

A control added to report columns for filtering report data by values in the columns.

automatic logout

A way of managing desktop user sessions by automatically logging out inactive sessions after a specified time of inactivity. Automatic logout is part of desktop usage administration, which assists organizations in lowering seat usage for licensing compliance. See also force logout.

backup directory

The directory that contains all the backup files created by the File Manager.

backup file

A file that is automatically saved each time a file is edited through the File Manager. Before the file is overwritten, the backup file is saved. The restore function can be used to revert to the backup file.

basic page set

The template and set of customer portal pages that have been optimized for display on browsers with limited or no JavaScript capabilities.
billable task
A way of classifying and recording the amount of time agents spend working on incidents. The default billable task is Miscellaneous, and custom billable tasks can be added.

block
A section of widget code that can be customized to extend the view of a standard widget. Widget code that is not within a block cannot be modified.

block quotes
A symbol or HTML tag that designates a section of text that is not part of the most current email reply, such as previous entries in the email conversation. See also checksum and techmail.

boolean searching
A knowledge base search that allows customers to connect multiple keywords using & (AND) and |(OR) operators.

bounced email
Email that is undeliverable. Emails can be bounced when email accounts are not functioning properly or are full at the time the mailing is sent. Outreach and Feedback tracks bounced emails. See also email management.

broadcast mailing
A mailing sent to one or more contact lists or segments. Broadcast mailings can be sent at a scheduled time and can also be used in campaigns.

broadcast survey
A survey sent as a broadcast mailing in which the message, audience, and mailing options are defined in the survey.
**builder**

A community member whose primary role is to create hives and groups for a community. Access to builder functions is provided by the Builder–Custom and Builder–Template user types. See user type.

**Bulkdel**

A utility for deleting several incidents at once.

**business objects**

The page of the Customer Portal Administration site that defines the set of answer, contact, and incident fields that can be used to define input and output fields on the customer portal.

**business rules**

A component for defining processes to automate workflow, notification, and escalation. Business rules can automatically route incidents, opportunities, and chat sessions; send email and Outreach messages; escalate answers, incidents, opportunities, and tasks; update records; assigns SLAs; and create Offer Advisor targets. See also script rules, target rules, and workspace rules.

**cached data**

Report data that has been temporarily stored in the database for quicker report generation. This data is cached nightly by the Agedatabase utility and can be purged regularly. Cached data also refers to local cache files stored on a staff member’s workstation. This includes all option lists data (any data accessed from a drop-down menu or menu list such as customizable menu items) plus additional data such as report and workspace definitions, questions, documents, and standard text.

**Campaign**

A multiple-step marketing process based on business logic. Campaigns can contain any number of actions and decisions and move contacts through a series of steps when specified criteria have been met.
Canceled

A mailing and survey status that indicates a mailing or survey has been manually canceled before being completed.

case section

A logical group of conditional sections where one, and only one, conditional section displays to the customer. As soon as the first conditional section is matched, the content for that conditional section is added, and no other conditional sections within the case section are evaluated. Case sections make content more relevant and targeted to a specific audience than independent conditional statements. See also condition.

Case statement

A type of conditional element used for multiple-choice decisions that allows more diverse branching capabilities to be added to campaigns and surveys based on conditions defined in the workflow. Case statements are unique because they have an outgoing path for every condition. As soon as the first choice (condition) is matched, the path for that choice is followed, and no other conditions within the case statement are evaluated.

category

An option for grouping answers and incidents that allows more precise organization in the knowledge base. Staff members can classify answers and incidents by category and up to five additional levels of sub-categories, allowing more refined searching by customers and staff members. See also product.

category page

A custom page that serves as a landing page for grouping and accessing custom content pages in a community.

certificate

A digital piece of information for email and Internet security that includes the name of the certification authority, the holder of the certificate, the certificate holder’s public key, the dates the certificate is valid, the serial number, and the digital signature of the certification authority. Certificates are also called public and public key certificates.
**certificate revocation list**

A list of certificates that have been suspended or revoked before they have expired. The certification authority maintains, updates, and publishes the certificate revocation list at regular intervals.

**certification authority**

A third party authorized to issue certificates and authenticate the identity of the holder of the certificate.

**channel**

The source of an incoming incident or outgoing response. Channels are grouped as standard email channels (Service Email, Outreach Email, Phone, Fax, Post, Service Web, Outreach Web, Chat, and Email) and social channels (Community, Twitter, YouTube, RSS feeds, and Facebook). Channels are also used to indicate the source of information for incident notes on the accessibility interface and contact, opportunity, and organization notes.

**channel account**

A shared credential that permits one or more designated staff accounts to pass through a social media site when login and password authentication is required. Channel accounts can be created for communities, Facebook, and Twitter.

**channel type**

The social channels tracked in contact records when storing social account user names and associating social monitor incidents to contacts. Channel types include Facebook, Twitter, and YouTube.

**chart style**

A collection of display settings that can quickly be applied to charts used in reports. Chart styles control most of the graphical configuration of charts.

**chat agent status**

A method of tracking an agent’s availability to chat. The default chat agent statuses are Unrestricted, Unqualified, Unspecified, In Meeting, and On Break, and custom statuses can be added.
chat agent status type

The status of an agent's availability to chat. Default chat agent status types are Available, Unavailable, and Logged Out.

chat session

A real-time, two-way dialog between a customer and one or more chat agents. See Oracle RightNow Chat Cloud Service.

chat session queue

A sequence of unassigned requests for chat sessions. The default chat session queue is Default Chat Queue, and custom queues can be added. Requests are added to chat session queues automatically by business rules.

chat session routing

A process of routing customer requests for a chat to a specific chat session queue based on rules in the Chat rule base.

checksum

A calculated value that represents the content of a block of quoted text. This value is sent within the block quote tags of the email message and is used to determine if text has been added to the original message. See also techmail.

choice question

A question type that allows customers to choose their answer from a menu, radio button, check box, or list.

Click-Once installer

A utility used to install the Oracle Service Cloud Smart Client on staff members' workstations.

client

The interface that displays on a customer's computer when submitting a request to chat with an agent.
clone

To create an exact copy of an existing site or interface.

Closed

One of the default opportunity statuses and status types. An opportunity with the Closed status has resulted in a sale.

cloud search

A search of social networking sites in order to track customer reaction to an organization’s products, services, and overall reputation. In addition to searching the social cloud, staff members can schedule cloud searches, ignore or respond to posts, and create incidents from posts.

clustering

An automatic process that groups the knowledge base into clusters of related answers and labels each cluster group with keywords that define those answers. See also data mining and topic browsing.

co-browse

A feature in Chat that enables agents to guide customers through web pages using their mouse or other pointing device to demonstrate actions. Co-browsing may also be available on incident workspaces to let customers share their desktop with agents when they are on the phone.

Code Assistant

A Customer Portal tool to aid migration of custom code from earlier framework versions to a newer version. The tool offers code suggestions for migrating widgets, converting to a new UI version, and removing features that are no longer supported.

color scheme

A collection of colors that can be applied to chart styles. Multiple colors can be defined and combined into one color scheme. Charts that use the same scheme use the same set of colors.
comment
A form of content created by members when responding to posts in a community.

community
A social web solution consisting of customizable hives, members, groups, and custom pages.

community privacy level
The level of privacy that determines whether a login is required to access community content.

comparison period
A reporting parameter used to compare a report's time period to an identical length of time in the past. Comparison periods are defined when creating or editing a custom report and can be included in standard reports.

compatibility set
A set of Customer Portal widgets designed to be used together. Best practice recommends using widgets from the same compatibility set on any given customer portal page rather than combining them from different compatibility sets.

competitor
An option for identifying other parties pursuing the same opportunity.

compile
A process that runs the compiler engine to check states, functions, and rules within a rule base to ensure there are no errors. See activate.
Completed

A mailing and survey status that indicates a broadcast mailing or broadcast survey has been sent. The system automatically sets the status to Completed from the Sending status.

complex expression

A search technique that enables customers and staff to search for a broader set of content. This technique allows wildcard searching using an asterisk (*) at the end of a word or partial word and a tilde (~) before a word to perform a similar phrases search on that word only. Word stemming and logical operators are also supported. This technique is available on the administration interface and the customer portal.

computed field

A column whose value is derived from calculations performed on database fields. Computed fields can be added to output levels in custom reports.

condition

The part of a business rule that determines whether an answer, contact, incident, chat session, opportunity, organization, target, or task matches a business rule. Rules can contain multiple conditions. Conditions are also a part of script and workspace rules.

conditional formatting

A method of highlighting specific information in report columns that does not require creating data exceptions.

conditional section

A section of text in a document that appears only to those contacts meeting certain criteria. Conditional sections can also be placed in answers and tagged with specific answer access levels. In message templates, conditional sections can be used to filter content by contact, profile, runtime variable, or record type. See also access level conditional section.

conference

A feature in Chat that enables an agent to conference another agent into a chat session with a customer.
configuration button

The button in a staff member’s navigation set containing a list of all the configuration items necessary to configure and customize an organization’s application. Items can be added to or removed from this button from the Navigation Sets editor or, with the Customize Navigation Sets profile permission, the Customize List window. See also configuration list.

Configuration Settings editor

The interface element used to customize the functionality and features of the administration interface and the customer portal.

configuration list

All of the configuration items associated with the configuration button in a staff member’s navigation set. The configuration list is organized in a tree on the navigation pane.

configuration settings

All of the settings accessed from the Configuration Settings editor to configure and customize the administration interface and the customer portal in Oracle Service Cloud.

Configuration Wizard

An interactive utility for configuring web indexing on the customer portal. Web indexing allows customers to search the knowledge base along with web pages and other web-accessible documents within a specified domain. See Web Indexer.

Connect Object Explorer

A ROQL query interface that helps Customer Portal developers become familiar with the Connect for PHP API and explore Connect objects and metadata.

contact

Any individual with a contact record in the knowledge base. Contact records can be added by staff members on the Service Console and by customers on the customer portal. Contact records are also added automatically when a
customer without a record submits a question on the Ask a Question page of the customer portal. See also primary contact.

**contact custom field**

A field for gathering and displaying additional information about contacts. Contact custom fields appear when adding or editing a contact record and on the Your Account page of the customer portal.

**contact list**

A static or fixed group of contacts that is used to choose the contacts who receive a broadcast mailing or survey. Contacts can be added to lists.

**contact role**

An option for classifying contacts by their roles in opportunities.

**contact type**

An option for classifying contacts by types, such as job positions or decision-making roles.

**Content Library**

A component for creating content that can be used in mailings, web pages, and surveys. Content includes documents, tracked links, files, templates, and snippets.

**content page**

A type of custom page to which community content and functions can be added using panels. See also category page.

**content pane**

The area on the console where staff members work with items selected from the navigation pane or the application menu.
content pane tabs

An interface element for switching between the items currently open on the Service Console. Content pane tabs display at the top of the content pane by default. Staff members can click a tab to return to a report or item or right-click a tab and select from a number of options.

context-sensitive answers

A subset of SmartAssistant that allows organizations to construct special Related Answer links from any web page to provide additional information to their customers. See also help access level.

control

A tool for placing titles, spacers, reports, and other advanced features on a workspace.

cross tab

A method of displaying report data in a table format.

CSV (comma-separated value)

A file format with commas separating one column value from the next. Each row is delineated by a hard return. Also called comma-delimited.

cultures

A predefined set of attributes, such as decimal symbols and display formats, used to populate fields on the Currencies editor. Cultures are comparable to regions in Microsoft Windows. See also Currency.

Currency

A monetary denotation based on country of origin. Currencies can be defined for each country or province in which an organization does business. See also Exchange rate.
custom field

A field for gathering and displaying additional information about answers, contacts, incidents, opportunities, organizations, quotes, sales products, staff accounts, and tasks. Custom fields appear when adding and editing records. Depending on the type and visibility, they may also appear on the customer portal.

custom object

Any custom table created or managed from the object designer. Custom objects can be added to Oracle Service Cloud to integrate organization-specific data with the database. Although custom objects are not native to Oracle Service Cloud, they can be tied to standard objects and added to workspaces, workflows, custom reports, and navigation sets. See also object and Oracle Service Cloud standard object.

custom page

A category or content page that can be fully customized to extend areas of a community in need of additional resources or exposition. See category page and content page.

custom report

A report that is created by copying and editing one of the standard reports in Oracle Service Cloud and saving it as a new report, or by combining data from selected tables in the database to create a new report. Custom reports can include customized output, data computation, and scheduling. See also standard reports.

customer

A contact or organization that has a service or purchase history in the knowledge base.

customer account

Information consisting of a user ID and password that allows customers to access certain functions on the customer portal, such as the Account Overview page. Customers can create an account by clicking the Sign Up link or the Your Account tab on the customer portal. Customer accounts are also automatically created when a customer without an account submits a question, which adds a contact record to the knowledge base.
Customer Portal Administration site

The site where administrative tasks, such as selecting the page set, viewing widget definitions and logs, and defining page set mapping, are performed.

dashboard

Any combination of individual reports shown together in one report. Using dashboards, staff members can search for and view a wide range of data from different reports without opening each report individually. The customer portal also includes a dashboard on the Customer Portal Administration site.

data dictionary

A list of all the tables in the Oracle database that can be accessed from the Service Console. Data dictionary also refers to the list of available tables and fields that can be used in custom reports and is accessed from the report design center. Functions, output variables, and computed fields can also be selected from the data dictionary when working with a custom report.

data import template

A saved format used by the Data Import Wizard to map columns in a CSV file to columns in the database. See Data Import Wizard.

Data Import Wizard

An interactive utility used for importing records into the database.

data mining

The exploration and analysis of large quantities of data to discover meaningful patterns and rules. Data mining enables organizations to turn raw data into information they can use to gain a marketplace advantage.
**data set**

The database tables and table joins that determine what data can be returned in a report. Data set also consists of the database columns a segment (dynamic list in Outreach and Feedback) will have access to and what filters will be used to determine the final data set.

**data type**

A set of data having predefined characteristics such as strings, integers, or dates. Each column in a database table is assigned a data type. Data type also refers to the type of custom field specified when adding answer, contact, incident, opportunity, organization, quote, sales product, staff account, and task custom fields. Data types for custom fields consist of menu, radio, integer, date, date/time, text field, and text area fields.

**database**

The tables that store information that is retrieved, edited, and added in an Oracle Service Cloud application. See also data dictionary.

**Dbaudit**

A utility that builds and populates the schema and performs the database portion of the Oracle Service Cloud upgrade. Dbaudit can also be used to view the database schema.

**Dbstatus**

A scheduled utility that escalates incidents, answers, tasks, and opportunities based on business rules. Dbstatus also sends emails to those customers who have requested to be notified when a particular answer has been updated, and processes private Twitter messages for the social monitor. See Answer update notification, Business rules, and Social monitor.

**Dead**

One of the default opportunity statuses and status types. An opportunity with the Dead status is no longer being pursued by a sales representative.
**decision**

A component of a campaign. Decisions filter contacts by specified criteria and can have Yes and No paths.

**decryption**

The process of converting encrypted text into readable text using private keys assigned to authorized persons.

**default directory**

The directory containing original default copies of all the files customizable through the File Manager. During an upgrade, any files that have changed will also be updated in the default directory. Using the restore function, a file can be restored to the original configuration. See File Manager.

**deliverability**

The degree to which an email message aligns with industry-accepted practices to ensure delivery to an intended recipient. Emails with low deliverability are often blocked by ISPs and spam filters.

**dependency**

A relationship or association between items in the database in which the use of one item impacts the functionality of the other item. When a dependent item is deleted, such as deleting a contact list used in a mailing, all items that use the dependent item become invalid and must be manually updated.

**deploy**

To stage customer portal pages from the development folder and then promote the staged files into production. See also stage and promote.

**deployment log**

The record of actions taken on customer portal files, including staging, promoting, rolling back, and updating through upgrades and service packs.
deprecated
A condition that indicates a feature or widget has been replaced with different functionality or a newer widget.

design space
The section of the workspace designer where fields and controls are added, edited, moved, and removed to create a workspace.

desktop usage administration
Functionality for managing desktop user sessions to help organizations lower seat usage for licensing compliance and reduce costs. The administrator can manage both active and inactive sessions using force logout and automatic logout options. See automatic logout and force logout.

desktop workflow
A sequence of workspaces, scripts, decisions, and actions presented to staff members as a dynamic interface to support complex business processes.

development area
The set of customer portal files that can be edited and viewed without being available to customers. Designers and developers can work on these files and test their changes until they are satisfied that the files can be made publicly available to their customers, at which point the development files are staged and promoted to the production area. See also production area.

display position
The position where a new answer appears on the Answers page. Options include Historical Usefulness; Place at Top, Middle, or Bottom; Fix at Top, Middle, or Bottom. The display position is selected from the answer’s Display Position drop-down menu.

disposition
An option for classifying and recording how incidents are ultimately resolved. Up to six levels of dispositions are available.
**distribution list**

A mailing list of non-staff member email addresses used for scheduling reports or any mailing event.

**docked filter**

A run-time selectable filter or output variable that is added to the top of a report. Docked filters let report users select different run-time filter values and output variables in the report, bypassing the Search window.

**document**

The material used in a survey or mailing, or served as a web page that can contain text, snippets, conditional sections based on contact filters, merge fields, links, and web forms.

**DomainKeys (DK)**

A form of email authentication that uses a cryptographic signature to verify that an email message originated from a specific organization. DomainKeys differs from DKIM authentication primarily by the email headers used to generate the signature.

**DomainKeys Identified Mail (DKIM)**

A form of email authentication that uses a cryptographic signature to verify that an email message originated from a specific organization. DKIM differs from DomainKeys authentication primarily by the email headers used to generate the signature.

**dormant incident**

An incident that is not returned when performing word- or phrase-based searches. After remaining in the Solved status for a specified time, incidents become dormant to ensure that the knowledge base is populated with the most useful and timely information.

**Draft**

The preliminary status of a mailing or survey. When a mailing or survey is created, it is set to the Draft status. The status will also return to Draft if the mailing or survey’s schedule is canceled.
drill down

To start at a top or general level and become more specific at each lower level. The drill-down feature enables access to additional output levels in reports.

drill-down filter

The fields in an output level used to filter the data returned when drilling down to another output level. This impacts what data is returned in the drill-down level.

drill-down link

The field in an output level that is used as a link to drill down to the next output level.

dynamic form

A form that hides or displays fields based on a customer's response to other fields on the form.

editor

A layout format on the content pane when working with records and configuration items. Editors contain the fields for adding and editing records and items.

Else clause

The clause that follows the Then clause of a business rule. If the conditions of a rule are met, the actions in the Then clause are invoked. If the rule's conditions are not met, the actions in the Else clause are invoked.

email address sharing

Functionality that allows a single email address to be shared by multiple contacts, such as members of a family or team. When enabled, a contact-matching process is used to associate records and transactions initiated by a shared email address.
email answer

A feature that enables customers to email answers they are viewing to a specific email address.

email management

Functionality that sends and receives email messages, processes bounced messages, intelligently routes incoming inquiries based on business rules, and automatically suggests answers to inquiries.

email message

An email that is automatically sent to customers or staff members. The process of sending email messages is triggered by events in Oracle Service Cloud. For instance, when a customer submits a question, the Question Receipt message will be sent to the customer’s email address. Using the Message Templates editor, staff members can customize each message and standardize their design to give them all the same look and feel. See message templates and Global template.

encryption

The process of translating a text message into unreadable text to ensure security. Encrypted messages may be read only by authorized persons with access to a private key that allows them to convert the message back into readable text.

escalation

A means of tracking answers, incidents, opportunities, and tasks using business rules. When a rule’s conditions are met, the rules engine schedules escalation to the new level. When the scheduled time (based on absolute or relative time) arrives, the rules engine sets the escalation level and takes the action specified by the rule, such as sending an email, notifying a manager, or following up with a customer. See business rules.

Even split mode

A market testing option that sends test messages to equal portions of an audience for broadcast mailings and surveys. See market testing.
event (Named/Exit/Finish)

An action defined in a script rule or workspace rule that can be used to trigger other rules or workflow connectors. Events are defined by adding event fire actions, such as the Fire a Named Event action.

Everyone access level

An access level designed to allow answers to be visible to all customers depending on the answer status.

exception

A method of highlighting report data that meets certain criteria. Data exceptions also allow email alerts to be sent when data in a scheduled report meets the exception criteria.

exchange rate

A scale of monetary conversion from one currency to another. See Currency.

explorer

A layout format on the content pane that displays a tree on the left, containing folders and other items, and a detailed list of the selected folder’s contents (subfolders and files) on the right. Explorers are available for certain configuration items and components in Oracle Service Cloud.

expression

A component of fixed and run-time selectable filters that defines a function, database column, value, or any combination of the three.

extend

Using the widget builder to create a new widget by modifying the behavior and attributes of an existing widget.
external event

A program or script that runs as the result of an event occurring in Oracle Service Cloud, an action specified in a business rule, or an action in a marketing campaign.

external suppression list

An email delivery filter used to exclude an explicit set of email addresses from all mailings and surveys. When a mailing or survey is launched, contacts with email addresses in the list are filtered from the audience by default.

FCRR (first contact resolution rate)

A statistic that reports how often staff members or groups solve incidents with only one response. This number is displayed as the percentage of incidents solved with only one staff response.

file

A file that is uploaded to Outreach for attaching as a link in a document or snippet. From the Content Library, files can be uploaded and their characteristics can be defined.

file attachment

A file that is attached to an answer, contact, incident, opportunity, organization, or task, or sent with an incident response or quote. Files that are permanently attached to an incident or answer can be viewed by customers who view the record. Files that are sent with an incident response can be opened with the customer’s email client and are not permanently attached to the record.

file attachment answer

A type of answer that appears as a file attachment.

file link

A clickable link to a file attachment that is inserted in a snippet or a document.
File Manager

The interface used to modify files for Oracle Service Cloud products. Administrators can modify files used to customize a site’s Chat images, custom scripts, wordlist files, dictionary files, and certificate directories.

File menu

The interface element used to access the application menu. The File menu is located to the left of the Home tab on the ribbon. See also application menu.

final message

A mailing format used to send the mailing as final. In broadcast mailings and surveys, final messages are sent to all audience members who have not yet received a test message.

first due

A queuing pull policy that uses the incident due date or longest wait to determine which incidents or chats to retrieve from the queue.

fixed filter

A component of Analytics and Outreach and Feedback segments used to define the data set available in the report or segment. Fixed filters are statements constructed from expressions, functions, and operators, and cannot be altered when using a segment or when running a report. See also custom report and segment.

flag

A method for defining the priority of a record. A flag displays at the top of records and staff members can add text to the flag and change the flag importance (red=high, blue=medium, green=low, white=no importance).

flow diagram

A graphical representation of a campaign, survey, or desktop workflow. Flow diagrams allow staff members to diagram the events and decisions of a campaign, survey, or business process. When a campaign or survey is launched, contacts are automatically moved through the flow based on the specified criteria. When a desktop workflow is associated with
a record editor in a profile, staff members with that profile will move through the flow when opening a record of the corresponding type. See also desktop workflow.

**force logout**

A way of managing desktop user sessions by manually logging out staff accounts who are currently logged in. Force logout is part of desktop usage administration, which assists organizations in lowering seat usage for licensing compliance. See also automatic logout and desktop usage administration.

**forecast**

A projection of revenue for an opportunity that may close in a given sales period.

**foreign key**

A column or columns that contain values found in a primary key of another table. Foreign keys are used to ensure relational integrity and are rarely primary keys. See also primary key.

**Forward to Friend link**

A link that enables contacts to forward the message to another email address. This type of link can be added to documents, templates, and snippets for use in mailings, surveys, or web pages.

**framework**

The underlying code structure of the Customer Portal, which offers a standard reference implementation as well as the ability to customize code for particular applications.

**function**

A mathematical operator that can be applied to data from database fields to modify the data that is returned in an output column. Function also refers to a container for business rules. Functions are used anywhere in a business process that dictates doing the same thing in more than one place. Functions reduce the number of rules needed by allowing the same rules to be evaluated from multiple states. See also business rules and rule state.
Give Feedback

A link on the sidebar on the Customer Portal template that customers can click to submit feedback about an organization’s website, customer service, or product satisfaction.

Global header

The global header, located at the top of the Agent Browser UI, contains options for working in Oracle Service Cloud.

Global template

An element of message templates functionality containing the content that frames the message-specific content in each system-generated notification and email message. The global template is used to standardize the design of outgoing messages to give them the same look and feel. See message templates.

group

A way to organize staff accounts in Oracle Service Cloud. In communities, group refers to a collection of members based on a common interest, cause, or organization.

group type

A classification used to organize groups in a community and expand searching of related members and content.

grouping

A method for grouping data in a segment. Filters can be used when grouping and are applied to the data after the grouping is completed.

guest

Any community visitor who is not logged in with a community account.
guide

A collection of branching questions, responses, answers, and text explanations used in guided assistance. Guide also refers to information about a promotion generated by a marketing staff member. This information appears on the Offer Advisor window to help agents present the promotion to customers. See guided assistance and Offer Advisor.

guided assistance

A component that helps agents quickly locate answers and text explanations using branching questions to guide them to the answers they need. The answers and explanations agents find can be sent to customers in incident responses or relayed to customers over the phone. Guides can also be made available to customers on the customer portal to help them find their own answers to questions.

hash

A ten-digit alphanumeric string used to identify a specific hive, page, group, or member for certain community functions.

help access level

An answer access level for context-sensitive answers. Help answers are not visible to customers except through special hyperlinks. See context-sensitive answers.

Hosting Management System (HMS)

An application used to manage a Service Cloud upgrade. It manages scheduling and notifications, and includes checklists of tasks that must be performed prior to and following an upgrade to a new release.

hive

A resource entity, such as a blog or message board, used by community members to communicate about a central topic, theme, or goal. Hives are sometimes referred to as resources.

hive permissions

The set of permissions that allow members to perform specific actions in the hive, such as adding members, posting content, or commenting on posts.
hive privacy level

The hive access status determined by the community privacy level and hive permissions. See community privacy level and hive permissions.

hive template

A hive that is set to the Template status, making it accessible as a design template but not editable or searchable by the community. See also hive.

hive type

A classification used to organize hives and expand searching of related content.

HTML answer

A type of answer that appears to customers as standard HTML on the customer portal.

HTML editor

A WYSIWYG (what you see is what you get) editor for formatting and editing answers, mailings, campaigns, documents, questionnaires, invitation messages, and message templates in HTML without previous HTML experience.

identity provider

A third party that authenticates user information and sends verification to a service provider, such as Oracle Service Cloud, allowing single sign-on for the user. See also SAML 2.0 open login.

IMP (import) file

A data file with an extension of .imp that is used by the Kimport utility to map values in the CSV file to columns in the database.
In Meeting

One of the default chat agent statuses. This status indicates that the agent is in a meeting and is unavailable to chat. The In Meeting chat agent status has an Unavailable status type.

Inactive

One of the default opportunity statuses and status types. An opportunity with the Inactive status is no longer being pursued but could be activated at a later date.

inbox

An agent’s personal queue consisting of all the incidents that have been assigned to the agent.

inbox limit

The maximum number of incidents in an agent’s inbox that cannot be exceeded when pulling from a queue. The inbox limit is set in the profile to which the agent is assigned.

incident

Any question or request for help submitted by a customer through the Ask a Question page, email, a chat session, site or answer feedback, or from an external source using the API. Incidents can also be added by agents when they work with customers by phone, fax, or mail, and when responding to a private Twitter message.

incident archiving

A process that permanently removes incidents from the database. Archived incidents are then stored in searchable data files. Staff members can access archived incidents once the Archived Incidents component has been added to their navigation set.

incident custom field

A field for gathering and displaying additional information about incidents. Incident custom fields appear when adding or editing an incident and on the Ask a Question and Support History pages on the customer portal.
incident thread masking

A method of protecting sensitive customer information, such as social security and credit card numbers, from displaying in incident threads. Three default system masks are available and custom masks can be created.

incident queue

A sequence of unassigned, unresolved incidents. When an incident queue is added, it can be defined as the default queue. Incidents are added to queues automatically by business rules or manually by re-queuing and are handled in a first-in, first-out manner.

incident severity

An option for classifying and recording an incident’s importance and urgency.

incident status

A method of tracking an incident’s state. The default incident statuses are Solved, Unresolved, Updated, and Waiting, and custom statuses can be added.

incident status type

The status of an incident as it moves through the system. Default incident status types are Solved, Unresolved, and Waiting.

incident thread

The list of all activity on an incident, including the original question, agent responses and updates, customer updates, records of conversations, and internal notes about the incident (which are not visible to customers). The incident thread lists activity in chronological order and can be filtered by thread type.

index

A database item that can be added to a database field to speed up searches for information in the field. Adding an index to a field increases the amount of time it takes to write information to the field, and indexing a large number of fields decreases the overall responsiveness of the database. Generally, only fields containing a large amount of information that
are regularly searched on should be indexed. In Oracle Service Cloud, indices can be added to most custom fields and custom objects. See also custom field and custom object.

**indexing**

A process in which the text of an answer or incident is stemmed and indexed into keywords and phrases. These keywords and phrases are used to build the answer and incident phrases tables that are used during text searching. When an answer is added or updated, the Keywords, Summary, Question, and Answer fields are stemmed and indexed to create one-, two-, and three-word phrases. When an incident is added or edited, the Subject field and incident thread are stemmed and indexed to create one-word phrases.

**industry type**

An option for classifying organizations by type of industry.

**information gaps**

A report that clusters incidents and compares the topics to answer clusters, allowing organizations to pinpoint those areas (or gaps) in the knowledge base needing additional answers.

**initial state**

A required state in every rule base. The rules engine evaluates a new or updated object using all rules in the initial state. Unless one or more rules in the initial state transition the object to a function or different state, the rules engine stops after all the rules in the initial state have been processed. See also rule state.

**inline**

A method of displaying output definitions and filter definitions as lines of text in the report. See also output definition.

**inline editing**

A feature for editing values directly on a report without having to open each record to make changes. Staff members can edit individual values in one record or select several rows to change values in multiple records. Staff members must have permission in their profile to edit the specific record type, and inline editing must be enabled in the report.
inner join

A relational database operation that selects rows from two tables on the condition that the value in the specified column of the primary table is equal to the value in the specified column of the secondary table. See also outer join.

interface

The console, windows, and pages used by staff members and customers to access an Oracle Service Cloud application and interact with a single knowledge base. The interface name determines the URL for the website, the name of the executable, and the .cfg directory name. See also administration interface and agent desktop.

Interface Manager

A utility for managing multiple interfaces using one knowledge base.

invitation method

A way of distributing a broadcast survey, transactional survey, or website link survey.

Kexport

A utility for exporting either single tables or an entire database from an Oracle Service Cloud application.

Keywordindexer

A utility that creates an index of the keywords found in incidents, answers, file attachments, and documents indexed by the Web Indexer. The keyword indexes are used when searching incidents, answers, file attachments, and other indexed documents. See also Web Indexer.

Kimport

A utility for importing data, either single tables or an entire external database, into the database.
**knowledge base**

All information (such as answers, assets, incidents, contacts, organizations, opportunities, products, staff accounts, tasks, mailings, and campaigns) maintained and presented by Oracle Service Cloud in a meaningful way. Knowledge base also refers to the interrelationships among the pieces of information.

**knowledge engineer**

The staff member responsible for populating and maintaining the answers in the knowledge base. Responsibilities may include identifying when answers should be added, editing proposed answers, and reviewing existing answers to keep them current.

**Langcvt**

A utility for changing the language pack in Oracle Service Cloud from English to an alternative language pack. This utility converts the message bases and pre-populated knowledge base to the new language.

**language**

The language for a specific interface that determines, in part, what answers are visible for viewing by customers.

**Launched**

A mailing and survey status that indicates a transactional mailing or transactional survey has been launched and can be included in a rule or campaign.

**layout**

A predefined format that can be used in custom reports to apply fonts, colors, and other display options. Layouts can also be used in dashboards to apply a predefined structure for inserting reports.

**lead**

A potential opportunity. A lead is a contact discovered through a marketing campaign and forwarded to a sales representative through Opportunity Tracking. See opportunity and Oracle RightNow Opportunity Tracking Cloud Service.
lead rejection type

An option for classifying and recording the reasons for rejecting a lead.

leaf level

A level of product, category, or disposition that does not contain any sublevels. See product linking.

learned link

Related answers that have a learned relationship as a result of customer activity.

Live Chat

A link on the sidebar on the Customer Portal template that customers can click to submit a request to chat with a chat agent.

Live Media bar

The toolbar that displays when Chat is enabled. The Live Media bar allows agents to log in, log out, set their status, and manage chats. See Oracle RightNow Chat Cloud Service.

local settings

Customizations made by staff members to dialog and tool window sizes and locations, as well as content pane and navigation pane settings, console color and tint, toast notifications, and report appearance, including display and data settings and column formatting. Changes made by staff members to customize these settings affect only their workstation. In addition, staff members can return to the system defaults at anytime.

logical expression

An expression that defines the relationship between report filters or business rule conditions. The components of a logical expression are joined using Boolean logic and can be grouped and joined with AND, OR, and NOT operators.
**logical operators**

The symbols, (+) and (–), that can be used in most search techniques in Service to explicitly find answers that have a word (+) or that do not have a word (–).

**Login window**

A dialog box for entering user name, password (if required), and site information to access the administration interface of an Oracle Service Cloud application.

**Lookup field**

A field in a custom object designated to store values that are used as the names of the object’s records. These names display on editor tabs and the navigation pane’s Recent Items list. For instance, the Recent Items list displays incident reference numbers since the Reference # field is designated as the lookup field for incidents. Values in lookup fields are also displayed in reports instead of the ID values from fields in other tables that link to the lookup field’s table. For instance, while the incidents table’s Assigned Account field stores account ID numbers, the values displayed for this field in reports are from the accounts table’s Full Name field.

**Lost**

One of the default opportunity statuses and status types. An opportunity with the Lost status has been lost, for example, to a competitor.

**mailbox**

An email box specified in Oracle Service Cloud and dedicated to collecting email inquiries sent by customers, responses to mailings, and bounced messages. Incoming emails are processed by the Techmail utility. See also Oracle-managed Service mailbox and Techmail.

**mailer daemon (rnmd)**

A utility that monitors Outreach and Feedback, listening for requests from other components to start the email process. The mailer daemon is installed during the initial installation and can be configured to send messages in the most efficient manner for an organization.
mailing

A collection of one or more messages sent to one or more contacts. A mailing can contain multiple messages for testing purposes.

mailing status

A method of tracking the state of a mailing. The default mailing statuses include Draft, Launched, Scheduled, Preparing to Send, Sending, Suspended, Suspended by Error, Canceled, and Completed.

manual policy

A pull policy that enables agents to manually pull incidents into their inbox from any queue designated in their profile.

manually related answer

A relationship between two or more answers manually defined by a staff member.

market testing

A method for testing different message formats in mailings and surveys on a percentage of the audience before launching a final email. Market testing is available in even split and random sampling modes. See Even split mode and Random sampling mode.

mask

A defined pattern that determines the format of information that can be typed in a field.

Master template

The settings that define a community’s navigation elements, footer content, and fine print text.
**matrix question**

A question type for displaying a series of survey questions in a table. Matrix questions are useful when a group of questions can be responded to with the same set of answer choices.

**member**

A community user who has a login and can be associated with one or more groups in the community.

**member type**

A classification for community group members that defines their role and provides access to certain group functions.

**merge field**

A variable field that looks up account, contact, incident, opportunity, organization, or tracked link information and inserts it in the text of a document, snippet, document template, message template, quote template, or the message content and mail attributes of mailings and surveys.

**merge report**

A report that can be included in marketing and survey content that dynamically limits the data returned so that customers see only their own information. For instance, if the report lists contacts and their open incidents, customers see only their own open incidents.

**message**

An email consisting of a collection of HTML, text, and images in a particular format.

**message base**

An editable text string that allows international language support and customization of headings, labels, buttons, and other text on the administration interface and customer portal and in email messages and notifications.
Message Bases editor

The interface element used to customize the message bases, including all the headings, labels, buttons, and other text, on the administration interface and customer portal.

message templates

A component for customizing and standardizing the content of administrator notifications, administrator emails, and contact emails. Message templates consist of a global template, which is used to standardize the design of outgoing messages, and a set of system-generated messages. See also global template.

migration

The process of moving from one version of the Customer Portal framework to a newer one. Migration can occur independently of upgrading to a newer version of Oracle Service Cloud. See also upgrading.

mobile agent app

Functionality for managing incidents, tasks, and contacts using an Apple iPad or iPhone device, the Oracle Tap application, and Oracle Service Cloud credentials.

mobile customer portal

The template and set of customer portal pages that have been optimized for display on mobile devices such as iPhones, Androids, and Palms. See also template and reference implementation.

model question

The associated question and answer that reside in the Virtual Assistant database. Model questions are linked to answers in the knowledge base and are displayed as similar questions on the Answers page of the customer portal. See Oracle RightNow Virtual Assistant Cloud Service.

Monitor

A feature in Chat that allows a supervising agent to monitor the chat sessions of other agents and to intervene when necessary.
**Msgtool**

A utility for creating a configuration report for an Oracle Service Cloud site, or for changing configuration settings when an error has been made in one of the settings that subsequently locks staff members out of the Configuration Settings editor.

**multi-select**

A feature for updating more than one record at a time.

**multiline**

A method of displaying report data grouped under headings based on common values in report columns.

**natural language**

Any approach that accepts and correctly handles human language. For example, English, French, and Japanese are natural languages, while computer languages, such as FORTRAN and C, are not. The knowledge base can be searched using natural language technology.

**navigation buttons**

The buttons on the navigation pane associated with record types and components. Clicking a button displays the record type or the component’s navigation list.

**navigation list**

All the reports, folders, and items associated with a specific record type or component in Oracle Service Cloud. Navigation lists are organized in a tree on the navigation pane.

**navigation pane**

The area on the left and right side of the console where staff members work with navigation lists, select items to open on the content pane, and search the knowledge base. In the default configuration, the left navigation pane contains Recent Items and Navigation tool windows; the right navigation pane contains the Quick Search tool window. What appears on the navigation pane depends on the navigation set assigned in each staff member’s profile and the permissions assigned.
in the profile. Each navigation pane can also be customized by staff members. See also Configuration button, navigation buttons, and Tool window.

**navigation set**

Any combination of navigation buttons and their associated navigation lists. The Configuration button can also be added to navigation sets. Staff members are assigned a default navigation set in their profile.

**next-upgrade checklist**

The UMS checklist that keeps track of all recurring tasks for each product enabled in your application. When the next upgrade is scheduled, the tasks in this list checklist are automatically added to the pre-upgrade checklist.

**normalized URL**

A URL that has been reformatted to ensure that documents that are referred to by multiple URLs will be indexed only once. Normalization may include reformatting domain names (for example, removing capital letters) or removing query parameters.

**note**

Information that can be added to campaigns, contacts, documents, mailings, opportunities, organizations, and surveys for internal reference. Notes can also be added to incidents in the incident thread.

**notification**

A message that notifies appropriate staff members about incidents, answers, mailings, campaigns, opportunities, and system errors. See also Answer update notification.

**object**

Any standard or custom table in the Oracle database. Object also refers to the specific answer, contact, incident, chat session, opportunity, organization, target, or task that is evaluated by the rules in the object’s rule base. See also custom object, Oracle Service Cloud standard object, and rule base.
object event handler

A PHP script with an integrated test harness (automated test script) that executes as the result of an event occurring on a standard or custom object in Oracle Service Cloud. See also custom object, Oracle Service Cloud standard object, and process model.

offer

A promotion developed by marketing personnel or a product suggestion generated automatically by Offer Advisor that is presented to a customer by an agent.

Offer Advisor

Functionality for creating and presenting promotions to customers and for making automatic recommendations based on customer attributes and purchase history.

On Break

One of the default chat agent statuses. This status indicates that the agent is on break and is not available to chat. The On Break chat agent status has an Unavailable status type.

open login

The ability to log in to the customer portal using an already established external account, such as Facebook, Twitter, or Google. When the external site validates the customer and the customer approves the transfer of information to Oracle Service Cloud, a contact record is created using the email address and the customer is automatically logged in to the customer portal.

operating system

The program that, after being initially loaded onto the computer by a bootstrap program, manages all other programs in a computer. UNIX, Windows, VMS, OS/2, and AIX are all examples of operating systems.
**operational database**

The database that contains the live data that is viewed, retrieved, and edited in an Oracle Service Cloud application. While reports that are run on the operational database can access real-time data, the reports cannot process as much information as reports that are run on the report database. See also report database.

**operator**

A symbol or word that represents a mathematical or logical action that can be applied to a condition or value.

**opportunity**

Information about a specific sale or a pending deal that is tracked and maintained in the knowledge base.

**opportunity custom field**

A field for gathering and displaying additional information about opportunities. Opportunity custom fields appear when adding or editing an opportunity.

**opportunity status**

A method of tracking an opportunity’s state. The default opportunity statuses are Lead, Reject, Active, Closed, Lost, Inactive, and Dead. Custom statuses can also be added.

**opt-in**

The explicit granting of permission by a contact to receive email communications from an organization. Opt-ins can be specific to certain mailing lists or applied globally across all mailing lists.

**opt-out**

An explicit request by a contact to be removed from a specific mailing list or from all lists, most often communicated by email or web form. Also called Unsubscribe.
Oracle-managed Service mailbox

The recommended type of Service mailbox created by Oracle. Oracle configures the initial mailbox setup, including enabling incoming email and defining the Pop Server, POP Account, and Password fields. Administrators can also create general Service and Outreach mailboxes for their application.

post-upgrade checklist

A UMS checklist that contains tasks that are specific to and created by your organization. The tasks on this list are enabled when your upgrade is complete. See also pre-upgrade checklist and next-upgrade checklist.

Oracle RightNow Analytics Cloud Service (Analytics)

A business reporting solution that enables organizations to capture, organize, present, and disseminate real-time actionable knowledge with speed and ease. Using Analytics, organizations can increase insights by identifying customers based on previous interactions across all channels.

Oracle RightNow Chat Cloud Service (Chat)

A component that provides customers with access to chat agents for questions and issues that require human interaction.

Oracle RightNow Connect Desktop Integration (JavaScript API)

A public API that enables customers and partners to integrate data contained on a workspace with a web page that is contained on the workspace. If external information is presented about the current record in a web page, this API can be used to update or read workspace data from the web page. See also workspace.

Oracle RightNow Connect PHP API Cloud Service (Connect PHP API)

A backward-compatible, public API that enables customers and partners to integrate with the Oracle Service Cloud platform using PHP scripts. Connect PHP API is primarily used to integrate with the customer portal, but it can also be accessed through the File Manager, process designer, and analytics. Connect PHP API leverages the Connect Common Object Model, which is also leveraged by Connect Web Services for SOAP.
Oracle RightNow Connect Web Services for SOAP (Connect Web Services)

A backward compatible, public API that enables customers and partners to integrate with the Oracle Service Cloud platform using industry leading standards such as WSDL 1.1 and SOAP 1.1. It provides broad support for a wide variety of languages, platforms, and tools. Connect Web Services leverages the Connect Common Object Model, which is also leveraged by Connect PHP API. See also Oracle RightNow Connect PHP API Cloud Service.

Oracle RightNow Customer Portal Cloud Service (Customer Portal)

The website interface that customers access for customer support. The customer portal is integrated with Service so customers can query the knowledge base for answers, ask questions, provide feedback, manage their customer account, and request chat sessions. It consists of a standard set of files that can be customized, uploaded, staged, and promoted to make the site available to customers. See also Mobile customer portal.

Oracle RightNow Cloud Service (Service)

A customer service and support solution that intelligently assists both customers and agents with inquiry resolution across standard and social channels. Service assists customer service and support organizations that need to easily capture, respond to, manage, and track all service interactions in one consolidated application.

Oracle RightNow Desktop Add-Ins Cloud Service (desktop add-ins)

An add-in framework for the Oracle Service Cloud platform that enables customers and partners to build custom .NET components, controls, and applications for the agent desktop. See also Agent desktop.

Oracle RightNow Feedback Cloud Service (Feedback)

A customer survey tool for gathering information about customers’ experiences with an organization. With a wide range of customization and formatting options, questions types, and full analytics for efficient reporting, surveys provide organizations with a flexible method of tracking customer satisfaction.
Oracle RightNow Opportunity Tracking Cloud Service (Opportunity Tracking)

A sales automation solution that enables staff members to easily manage all opportunity, organization, and contact information and track all quote interactions in one consolidated application.

Oracle RightNow Outreach Cloud Service (Outreach)

An email and campaign solution for delivering personalized, richly formatted email communications to targeted segments of customers and prospects and for launching full-scale marketing campaigns.

Oracle RightNow Professional Services

Services provided by Oracle, including training, support, and consulting.

Oracle RightNow Self Service for Facebook Cloud Service (Self Service for Facebook)

A Facebook application that provides access to customer-facing features of Oracle Service Cloud, such as Find Answers and Ask a Question, directly from Facebook's web and mobile interfaces.

Oracle RightNow Social Experience (Social Experience)

A set of complementary components, including Communities, Channels, Social Monitor, and Self Service for Facebook, each representing a different, powerful way of interacting with customers using social media. While each component serves a distinct purpose, they can be used together to create a wide-ranging social web presence.

Oracle RightNow Social Experience communities

A comprehensive social web solution consisting of Oracle RightNow Support Community Cloud Service and Oracle RightNow Innovation Community Cloud Service that lets customers connect, discuss, and contribute through forum discussions, question-and-answer sessions, resource libraries, and suggestions for service improvements.
Oracle RightNow Social Monitor Cloud Service (Social Monitor)

A monitoring tool for gathering and acting on information about an organization and its products that appears on social networking services such as Twitter and YouTube.

Oracle RightNow Virtual Assistant Cloud Service (Virtual Assistant)

A solution for identifying the intention behind a customer’s question using semantic search technology and linguistic dictionaries to return highly relevant search results and provide virtual assistant chats.

Oracle RightNow Wireless

The interface for accessing Service from a wireless phone or any device with a WAP (wireless application protocol) browser, such as a PDA (personal digital assistant).

Oracle Service Cloud

A customer experience suite combining web, social, and contact center experiences for a unified, cross-channel service solution in the cloud.

Oracle Service Cloud Smart Client

The web-based software that allows local applications to interact with the server-based applications. The smart client can be installed on staff workstations using the Click-Once installer. See also Click-Once installer.

Oracle Service Cloud standard object

Any standard table that is native to Oracle Service Cloud. Standard objects store data, including record types such as answer, contact, incident, opportunity, organization, and task. Other standard objects include accounts (staff accounts), assets, quotes, and sales products. See also custom object and object.
organization

Any company, business unit of a large company, or government agency that has an organization record in the knowledge base.

organization address type

A way of storing multiple addresses for a single organization. The default organization address types are Billing and Shipping; custom address types can be added.

organization association

A feature for associating a contact with a specific organization. Organization association links the incident and opportunity history of the contact and organization.

organization custom field

A field for gathering and displaying additional information about organizations. Organization custom fields appear when adding or editing an organization.

organization hierarchy

A feature for creating or changing the hierarchy of organizations. A hierarchy can be created by making one or more organizations subordinate to another organization. Twelve hierarchy levels can be used.

outer join

A relational database operation that selects rows from two tables regardless of whether the specified columns contain corresponding values. An outer join will return all rows from the primary table and any rows from the secondary table where the value in the specified column of the primary table is equal to the value in the specified column of the secondary table. See also inner join.

output definition

A description of a report that can be viewed when generating a report or when hovering over the report title and columns. Output definitions are predefined for all standard reports and can be defined when creating a custom report.
output level

A distinct section of a report that outputs report data. Reports can have multiple output levels, each of which can have their own filters, groupings, data exceptions, headers, footers, and descriptions. Output levels in a report are related through drill-down links and drill-down filters.

owner

The member who holds complete authority over a community group or hive. A member who creates a group or hive is designated as its owner unless ownership is transferred.

page

A web page or a customer portal page in an Oracle Service Cloud application.

page set mapping

The customer portal functionality that allows a specific page set to be mapped to a specific user agent. Customers are then directed to the most appropriate page set as determined by the browser or user agent accessing the customer portal.

panel

A customizable object used to display dynamic content on community pages. Panels can be added to custom pages and some standard pages. See also custom page.

path

The connector between items in a campaign flow diagram. A path can be one of four types (Standard, Submit, Yes, or No) and can connect two actions or an action and a decision in campaigns. See also action and decision.

Personal settings

An application option that lets staff members override settings in their staff account and customize settings that apply to the interface defaults in Oracle Service Cloud. Settings defined in staff accounts that can be changed include default currency, default country, time zone, and email notifications. The staff account settings changed from the Personal Settings option will also be made to the corresponding settings in the staff account.
pipeline
Calculated revenue that has not yet been acquired but is forecasted to close in a specified time period.

polling survey
A survey that displays as a single question on a customer portal page or any page external to the customer portal. After customers submit their response, they see a poll results chart or a thank you message. See also Oracle RightNow Customer Portal Cloud Service.

post
Content added by users of a social media site, such as a Facebook status update or a text entry in Social Experience communities. See Oracle RightNow Social Experience communities.

post type
The structure of a post as defined by the sequence of fields and controls used to create its content.

pre-upgrade checklist
The UMS checklist that becomes active when you request an upgrade. It includes a list of Oracle-created tasks and any custom tasks that should be completed before your upgrade.

preliminary screen pop
The toast notification that displays when an incoming chat request is received. The preliminary screen pop displays as a two-column table, and agents can view information about the chat request before accepting or declining the request.

Preparing to Send
A mailing and survey status that indicates a broadcast mailing or broadcast survey is about to be sent.
price schedule

An option for creating various pricing levels that can be assigned to sales products. Price schedules allow the same product to have different prices, such as wholesale and retail prices.

primary contact

The main individual associated with an incident or opportunity. All primary contacts have an associated contact record in the knowledge base. In Service, a primary contact must be associated with an incident for agent responses. In Opportunity Tracking, either a primary contact or an organization must be associated with an opportunity to serve as a point of contact for sales representatives during the sales process. See also contact.

primary key

A database table column that is indexed to enforce a unique constraint, meaning that a given value cannot appear more than once in the column. This column is used to uniquely identify each record in the table. Primary keys are often the target of a foreign key in a different table. See also foreign key.

priority

A ranking that defines the order in which incidents are pulled from multiple queues. The priority ranking also identifies which queues agents can retrieve incidents from.

private

One of two default answer status types. Answers that are marked Private are never visible to customers. See Answer status type.

private key

A password-protected key used by the holder to create digital email signatures and decrypt messages that were encrypted using the holder’s associated public key.
privileged access answers

Answers that are assigned a custom access level for viewing by certain contacts and organizations assigned to the appropriate service level agreement (SLA). See SLA.

process model

The virtual container that encompasses all event handlers (standard and custom) in Oracle Service Cloud. Using the process designer, a process model can be exported, imported, deployed, and rolled back. See also custom object, object event handler, and Oracle Service Cloud standard object.

product

An option for grouping answers and incidents that allows more precise organization in the knowledge base. Staff members can classify answers and incidents by product and up to five additional levels of sub-products, allowing more refined searching by customers and staff members. See also category.

product catalog

The list for organizing sales and asset products. See Asset product and Sales product.

product linking

An option for linking products to categories and products to dispositions so that category and disposition choices are narrowed to only those associated with the selected product for staff members working with incidents and customers searching on the customer portal.

Production area

The set of publicly available customer portal files and pages. The production area is updated when files in the development folder are staged and promoted. See also Development area.

profile

A mechanism for controlling access to administration functions and for assigning staff members specific permissions, default workspaces, a default navigation set, and report access.
promote
To copy all customer portal pages from the staging area into the production folder, where they become publicly available on an organization's website.

promotion
A specific message (for example, a discount, renewal notice, or announcement) delivered to a specific group of customers using Offer Advisor. Promotions are generally created by marketing staff members and presented to customers by agents. See Offer Advisor.

proof
A way to review the content of a mailing or survey to ensure the message is approved by the necessary contacts and staff members and as a final check for any mistakes. Proofs can be sent to a proof list or group of staff members who, in turn, can accept or reject the proof. Proof messages can also be sent to staff members when changes have been made to message templates. See also message templates.

proof list
A contact list that is available to receive proof messages, enabling its contacts to review mailings and surveys before they are finalized.

propose answer
A function for proposing that an incident's solution be added to the answers available to customers. The proposed answer is reviewed by the knowledge engineer, who determines if it should be made public and, if so, its access level, status, language, and visibility.

Proposed
One of the default answer statuses. This answer status indicates that the answer has been proposed by a staff member from an incident. Answers with a Proposed status are not visible to customers. See Answer status.
Public

One of the default answer statuses and status types. Answers marked Public may be visible to customers depending on their access level and language. See Answer status and Answer status type.

public certificate

See Certificate.

public key

Public information that may be attached to email messages to allow those who reply to the message to encrypt their response. The public key also verifies that the digital signature was created with the associated private key, thereby ensuring the integrity and authenticity of the message. Public keys are often referred to as public certificates, although certificates hold additional information besides the public key.

public key certificate

See Certificate.

publish report

A method of preserving a report’s graphical and tabular output as a snapshot. Once a report is published, it cannot be modified and the report data will remain unchanged even as the knowledge base is updated.

pull policy

The method for determining which queues agents can retrieve incidents or receive chat requests from and in what order. Pull policies include Strict Priority, Manual, and First Due.

pull quantity

The specified number of incidents to be retrieved from the queue at one time when an agent pulls incidents.
question

The main element in a survey. Text, choice, and matrix question types can be created. Questions can be used in multiple surveys, mixing and matching as necessary. See Choice question, Matrix question, and Text question.

questionnaire

The complete set of questions and all the pages in a survey. Using the HTML editor, staff members can create dynamic surveys using a graphical interface to add questions and create survey branches based on how customers answer. A questionnaire must be created for each survey.

queue

See Chat session queue and Incident queue.

queued report

A report that has been manually or automatically scheduled to run in the background after entering the report’s search criteria. When a queued report has been generated, a toast notification displays with a link to open the report.

Quick Access toolbar (QAT)

One or more buttons used as shortcuts to commands on the ribbon. The initial set of buttons on the Quick Access toolbar is specified by what is displayed on the content pane, but staff members can customize the toolbar to add frequently used buttons. By default, the Quick Access toolbar appears above the ribbon.

Quick Search

A component used to search for records and files when only limited information is known. Quick Search can be used to search the knowledge base no matter what navigation list is displayed or what is open on the content pane. Oracle Service Cloud contains a number of default Quick Search reports, and other reports can be added to the Quick Search button in navigation sets.

quota

The revenue goal assigned to a sales representative during a specified time period, such as month or quarter.
quote
A formal price assigned to a sales product for a particular customer during a sales period. Quotes also include any discounts applied as well as the valid dates for the quote.

quote custom field
A field for gathering and displaying additional information about quotes. Quotes custom fields appear when sending a quote with an opportunity.

quote template
A template defined for a specific type of quote. Quote templates are used when generating a quote for an opportunity. See also quote.

random sampling mode
A market testing option that sends test messages to a specified percentage of the audience. After determining the most effective message, a final message can be sent to any audience members who did not receive a test message. See Market testing.

record
Any individual answer, asset, contact, incident, opportunity, organization, or task in the knowledge base. Records can also be created for custom objects, which can be added to Oracle Service Cloud to integrate organization-specific data with the Oracle database. See also Custom object, Oracle Service Cloud standard object, and Record type.

record type
A database table that stores all records of the same type, such as answers and incidents. See Record.

record pool
The memory space used to temporarily store all records loaded in a single desktop workflow session. See Desktop workflow.
**record tabs**

The layout of information contained in a record. Each tab contains specific fields and options related to the record that can be viewed and updated as necessary.

**recurrence**

A scheduling method used to send or initiate the same report, mailing, survey invitation, campaign, or cloud search on a regular daily, weekly, monthly, or annual basis.

**reference implementation**

The standard set of files used to create the default customer portal as it exists without customization.

**regular expression**

A combination of operators and character strings used to define a search field or a condition statement in a business rule.

**Reject**

One of the default opportunity statuses and status types. A lead with the Reject status has been rejected by a staff member.

**related answers**

A feature that assists customers in finding answers to questions related to the current web visit. Related answers appear on the answer details page and are sorted by relatedness; those answers that appear at the top of the list are most related to the answer being viewed.

**relationship item**

A control used to create workspaces. Relationship items can include lists of records as well as other information such as audit logs and file attachments.
relative time

The number of hours from a specific event or time, such as two hours from the time an incident was created. Relative time is used in business rules and custom reports. In standard reports, relative time is the amount of time passed based on an organization’s work hours. See also absolute time.

relative value

A field value set by a workflow, script rule, or workspace rule that adds or subtracts, appends, or prepends, a value to the field’s previous value (for instance, increasing the value of an integer field by 1).

report

Any standard report, custom report, or list of records accessed from a navigation list on the navigation pane. Standard and custom reports can also be accessed from the Reports explorer. Reports are also used to display lists of answers or a customer’s incidents on the customer portal.

report database

A copy of the operational database that is used for reporting purposes. Reports that are run on the report database can process more information than reports run on the operational database. The data in the report database is copied from the operational database at scheduled intervals and therefore may not be as current as the data in the operational database. Also called replication database. See also operational database.

report control

A control that inserts a report into a workspace. See also workspace.

report linking

A feature for creating links between reports. Linked reports and dashboards can be seamlessly opened from other reports, just as report levels can be opened from other levels in the same report. Both conditional and unconditional links can be created.
report schedule

An option for subscribing to a standard or custom report. Staff members can schedule the report to be sent to an individual staff member, a group of staff members, a distribution list, an external email address, or any combination of these options.

report section

A section of an output level that contains a component of the report’s output, such as a title, chart, or tabular data.

report variable

An item added to a report that is used to return different data or data in different formats in the same column. For example, a single report can be created that displays the number of incidents by staff member, group, queue, or status. When running a report, the variable value is selected from the Search window or from docked filters.

Reportgen

A scheduled utility that sends out scheduled reports. See Report schedule and Scheduled report.

re-queuing

The action of moving an incident from an agent’s inbox into a queue.

resolution time

The maximum allowable time (in minutes) set by a service organization for resolving incidents. See also response requirements.

response interval

The days of the week and times when a service organization makes itself available to respond to and solve incidents on a daily basis. Days and hours can be specified. See also response requirements.
response requirements

The maximum time allowed (in minutes) for incident response and resolution within the operating hours defined by the organization. The response requirements are used to measure agent performance in responding to and solving incidents and can also be used for SLAs that do not have customized response requirements. See also SLA and response interval.

response time

The maximum allowable time (in minutes) set by a service organization for initially responding to new incidents. See also response requirements.

result grouping

A feature in a report definition for selecting fields to group data by. Result grouping provides a more organized view of a report. Multiple levels can be defined for result grouping. The more levels used, the finer the detail will be.

Review

One of the default answer statuses. This status can be used to notify the knowledge engineer when a public answer needs to be reviewed. See also answer status.

ribbon

All the tabs and buttons for performing actions and functions on an entire report, individual records in a report, or items in an explorer tree or list. The buttons on each tab are grouped by related functions, and each group is labeled. The tabs and buttons on the ribbon change based on what is displayed on the content pane.

rollover

A method of displaying additional report details by hovering over data described in the report’s output definition.

rollup

A method of displaying report data that groups records together by specific fields. The grouped records are displayed under headings that can be expanded or collapsed to display or hide the records under the heading.
root certificate
A self-signed certificate generated by a party that signs other public certificates. Certification authorities may authorize other entities to issue certificates. The root certificate belongs to the top-level certification authority.

round-robin queue
A type of incident queue in which unresolved incidents are automatically assigned to agents in a rotating fashion.

RPA (responses per assignment)
A statistic that calculates the average number of times a staff member or group responded to each incident.

RSS (Really Simple Syndication)
The primary standard used for the syndication of web content. RSS is an XML-based format used primarily for distributing news headlines on the Internet. Oracle Service Cloud contains an RSS channel so staff members can monitor RSS feeds for content. See Oracle RightNow Social Monitor Cloud Service.

rule
See Business rule.

rule base
All rules, states, functions, and variables associated with a particular object type (answers, contacts, incidents, chat sessions, opportunities, organizations, targets, and tasks) in business rules.

rule log
A feature for viewing the rule or rules that have fired against a specific answer, contact, incident, opportunity, organization, or task. See also business rules.
**rule state**

A container for business rules. Every rule base must contain an initial state, and states can be added to handle all stages of object processing. Rules in the initial state can transition objects to other states in the rule base. See also initial state.

**rules engine**

The software that evaluates objects to determine if they meet the conditions of any rules in the rule base and then executes the actions defined in the rules.

**run-time selectable filter**

A component that defines the initial data set available in a report and allows staff members and customers to customize the data returned. Run-time selectable filters are statements constructed from expressions, functions, and operators, and can be customized when running a report.

**S/MIME (Secure Multipurpose Internet Mail Extensions)**

A standard for sending secure email messages that can verify the sender’s identity. S/MIME emails can be encrypted for security and signed to verify authenticity.

**safe mode**

A login method that allows staff members to log in to Oracle Service Cloud without activating add-ins. Safe mode is available after malfunctioning add-ins have prevented administrators and staff members from logging in. See Add-in.

**sales period**

The period of time used to track the revenue goals assigned to each sales representative. The default sales periods are annual, semi-annual, quarterly, monthly, and weekly.
sales product

An option for identifying items or services sold by an organization. Sales products can be added to quotes and promotions.

sales products custom field

A field for gathering and displaying additional information about sales products. Sales products custom fields appear on the Custom Fields page of the Product Details editor.

sales representative

A staff member who may be assigned opportunities and who may also maintain contact and organization records.

SAML (Security Assertion Markup Language)

An XML-based protocol in which an identity provider authenticates a user’s identity and passes that information to a service provider, which can then decide to allow the user access to the service without requiring an additional login procedure. See also identity provider, SAML 2.0 open login, and single sign-on.

SAML 2.0 open login

A type of single sign-on that uses Security Assertion Markup Language (SAML) and is the protocol that Oracle Service Cloud uses for its single sign-on feature. See also SAML and single sign-on.

Scheduled

A mailing and survey status that indicates a broadcast mailing or broadcast survey is ready to be sent and will be emailed at the scheduled send date and time.

scheduled report

A report that is sent as an HTML email or HTML email attachment to staff members, distribution lists, or external email addresses at specified times. Scheduled reports can also be sent when alerts defined in data exceptions are triggered. See also exception.
schema

The structure of a database system described in a formal language supported by the database management system. In a relational database, the schema defines the tables, the fields in each table, and the relationships between fields and tables.

score

A calculated value that ranks the order of displayed answers. An answer’s score is determined by its solved count and any display position that was set when the answer was added or updated. Score also refers to the relative weight assigned to each choice in a choice question for surveys. Score values can be used for survey calculations to trigger rules or campaign actions based on a contact’s answers and also for reporting purposes.

screen pop

See Third-party screen pop.

script

A control that can be added to a custom workspace to help staff members enter record information in a logical order. Scripts can contain multiple pages with fields and other controls as well as branching logic to guide staff members to different pages based on actions they take on a script page.

script rules

A type of rule used to trigger actions, such as setting the value of a field, on script pages when specified conditions are met.

search and selection criteria

The run-time selectable filters and sorting options that can be defined when searching for a particular record. See also run-time selectable filter.
search index

A matrix that includes a list of important words within a document and their document of origin, allowing efficient searching. In some cases, the matrix is a database table. In other instances, the matrix is a file stored on a hard drive. For a word or phrase to be searchable within an incident, answer, file attachment, or external document, it must first be indexed.

search priority word

A word that is associated with an answer or a document. The associated answer or document will always be displayed to customers when the search priority word is included in their search text.

secure email

Incoming and outgoing email that has authenticity (the sender is who it appears to be), integrity (content has not changed during transmission), and privacy (only the intended recipient can read it).

seeding

The initial set of answers in the knowledge base.

segment

The criteria for creating dynamic lists of contacts based on user-defined filters. Multiple filters can be created and logical expressions can be used to create the exact data set needed to target contacts. Once a segment is created, it can be used in broadcast mailings and surveys and the group of contacts will be constantly adjusted and updated as they meet or fall outside of the segment’s requirements.

self-learning knowledge base

The automatic generation of self-service content based on customer interactions so that the most pertinent information is presented. See also knowledge base.
sender ID

A form of email authentication that identifies IP addresses authorized to send mail on behalf of a specific organization. Sender ID differs from SPF authentication primarily by the components of the email used to authenticate the message.

Sender Policy Framework (SPF)

A form of email authentication that identifies IP addresses authorized to send mail on behalf of a specific organization. SPF differs from Sender ID authentication primarily by the components of the email used to authenticate the message.

Sending

A mailing and survey status that indicates the broadcast mailing or broadcast survey is currently being sent to contacts. The system automatically sets the status to Sending after the mailing or survey is done being prepared to send or at the scheduled date and time.

Service Console

The user interface where staff members work in Oracle Service Cloud. Staff can add and edit records and items, generate standard reports and create custom reports, access their notifications, and chat with customers from this console. Administrators can also configure and customize their application from the console. Also called administration interface or agent desktop.

service level agreement

See SLA.

sharing

The process of sharing contacts, tasks, or both between Microsoft Outlook and Oracle Service Cloud. All sharing functions are initiated from Outlook.

Sibling answer

Related answers that share the same product or category. Sibling answers may also contain the same file attachments.
single sign-on

A method for a user (in Oracle Service Cloud, a staff member or customer) to log in to one application, known as an identity provider, and then be authenticated and logged in to another application, such as Oracle Service Cloud, without being required to log in separately to the second application. See also identity provider and SAML 2.0 open login.

SLA (service level agreement)

A contract that is applied to contacts and organizations specifying the level and type of customer service they are eligible to receive. Generic SLAs are created by administrators, and SLA instances are applied to specific customers, either automatically through business rules or manually by staff members. SLA instances are called service contracts on the customer portal and can be accessed from the Account Overview page. See also response requirements.

SLA instance

A customer’s individual copy of an SLA. An SLA is a generic contract that has not been applied to a specific customer. An SLA instance is a copy of the generic SLA applied to a specific customer.

slicing

A method of grouping tabular report data by a common element. When slicing, a common value in a field can be chosen and only those rows that have that value will be returned in the report. Other slice groups can be selected from links or a tree element.

Smart Interaction Hub (SIH)

Functionality for directing customer interactions to the most qualified source for resolution by leveraging agent skills.

Smart merge

A feature that allows staff members to merge similar answers in the knowledge base to provide more meaningful answers to customers and to reduce answer duplication.
SmartAssistant

Oracle technology that uses business rules to automatically suggest possible answers to customers’ email questions and Ask a Question queries. Staff members can use SmartAssistant to search for answers in the knowledge base that are related to an open incident or a current chat session. See also suggested answers.

SmartSense

Oracle technology that estimates a customer’s emotional state or attitude based on the words and language the customer uses when submitting a question in Service. SmartSense also rates the incident responses sent by agents. The SmartSense ratings for both customer and agent appear wherever they have been placed on the workspace. In Feedback, SmartSense evaluates text questions submitted by customers in surveys. In social monitoring, SmartSense evaluates posts returned from cloud searches.

snippet

Any text or part of a document that can be used in more than one document. Snippets can be added to documents from the Content Library component.

Social Monitor

A component for searching social networking sites to monitor and act on conversations about an organization and its products. See also Oracle RightNow Social Monitor Cloud Service.

Solved

One of the default incident status types and incident statuses. An incident marked Solved has been resolved.

solved count

The method for determining where an answer will display in the list of answers. The most useful answers (those with the highest solved count) are pushed to the top of the list, while those with the lowest ratings are moved down on the list. When a customer clicks one of the options in “Is this answer helpful?” on the answer details page, it directly affects the solved count. The solved count is increased for answers that are viewed, and the last answer viewed has a higher solved count than answers viewed earlier in the same web visit. The solved count is also increased when an agent uses a SmartAssistant suggested answer when responding to a customer’s question. By default, customer influence on an answer’s ranking accounts for 75 percent of an answer’s score, and agents affect 25 percent. Over time, an answer’s solved count gradually declines as it is viewed less frequently.
sort order

The sort order of a report’s output columns. The default sort order is defined when generating a report and can be modified when running the report.

Spacer

A control that is manually added to a workspace to maintain the row and column arrangement when fields and controls are moved and removed or to create white space in a workspace.

spider

See Web spider.

SSL (secure sockets layer)

An industry standard for secure Internet-based transfer of information.

staff account

The settings for a staff member authorized to access an Oracle Service Cloud application, including user name, password, profile, group assignment, and email information.

staff account custom field

A field for gathering and displaying additional information about staff members. Staff account custom fields appear on the Custom Fields page of the Staff Accounts editor.

staff member

Any employee with a staff account and profile authorized to access an Oracle Service Cloud application.
stage

To compile and optimize all the customer portal pages from the development folder, where they are created and tested, into the staging folder, where they appear exactly as they will when the staged files are promoted into production. Stage also refers to the level of completion of a particular opportunity within a specific strategy. Tasks can be defined within a stage and can be required to be completed before the opportunity can move to the next stage. See also promote, strategy, and task.

standard reports

The complete set of predefined reports available in Oracle Service Cloud. Standard reports can be copied and used to create custom reports.

standard text

Any text prepared in advance that can be sent to customers when responding to incidents, appended to responses by a business rule, or sent by an agent during a chat session. Also called standard response.

State

A field that classifies how contacts and organizations were added and what actions have occurred since their creation. The State field is automatically populated when a contact or organization record is added or updated, and staff members can also manually update the State field. State field options include Service, Outreach, Opportunities, and any combination of the three. State also refers to the current stage of an object in rules processing. See Rule state.

status

The current state of an answer, incident, mailing, opportunity, survey, or task. See Answer status, Incident status, Mailing status, Opportunity status, Survey status, and Task status.

status type

The current state of an answer, incident, or opportunity. Default answer status types are Public and Private. Default incident status types are Unresolved, Solved, and Waiting. Default opportunity status types are Active, Closed, Dead, Inactive, Lead, Lost, and Reject.
stopword

A word that is not included in the keyword indexes in Service and is not searchable as a result. Pronouns, articles, and adverbs are common stopwords.

strategy

A sales plan defined by an organization that includes stages and associated tasks that must be completed in order for opportunities to move through each stage. Strategies allow organizations to define multiple sales plans based on their business processes and help ensure that policies and procedures are enforced.

strict priority

A pull policy that defines the order in which the system pulls incidents or chats from multiple queues. The strict priority ranking also identifies from which queues agents can retrieve incidents.

style

All of the specifications that can be defined for presenting graphical and tabular data in a report, including fonts, colors, and borders.

subscription

A type of cloud search that pulls all available thread content from a custom Facebook or RSS channel account at regular intervals. See also cloud search.

suggested answers

The list of answers from the knowledge base that is returned when SmartAssistant is invoked, either by staff members working on incidents or engaged in chat sessions or through business rules that append answers to email questions and Ask a Question queries from customers. See also SmartAssistant.

suggestion

A product recommendation automatically generated by Offer Advisor using a predictive model based on customer purchase history.
Support Home

The entry page on the customer portal. This page provides customers with quick access to the tools they need to answer their questions and receive immediate customer service.

survey

A method of gathering customer responses and feedback. Surveys can be sent as mailings, served as a web page, or sent as events triggered by a campaign or business rule. See Oracle RightNow Feedback Cloud Service.

survey status

A method of tracking the state of a survey. The default survey delivery statuses include Draft, Scheduled, Launched, Recurrence Scheduled, Preparing to Send, Sending, Suspended, Expired, Suspended by Error, Canceled, and Completed.

Suspended

A mailing and survey status that indicates a mailing or survey has been temporarily suspended from the Sending or Launched status.

Suspended by Error

A mailing and survey status that indicates a transactional mailing or transactional survey encountered an error and has been temporarily suspended.

synchronization

The process of collecting and combining contact and task records in Oracle Service Cloud and Microsoft Outlook to ensure data is consistent between applications. Also called sync.

syndicated widget

A Customer Portal widget that can access the Oracle Service Cloud database from any external web page. The code used to place the syndicated widget on a web page is available under tag documentation on the Customer Portal Administration site.
system attribute

A customized field that can be added to account (staff account), answer, asset, contact, incident, opportunity, organization, quote, sales product, and task standard objects. System attributes can be displayed in reports and workspaces, and can be used when defining relationships between standard and custom objects. See Custom object and Oracle Service Cloud standard object.

table instance

A component of a data set that specifies the database tables that data can be selected from and how database tables are joined in a report or segment.

target

A specific group of customers sharing common characteristics to whom a promotion is presented. A customer may belong to more than one target.

target rule

A type of business rule that has the sole purpose of creating a target consisting of contacts who meet the conditions established by the rule.

task

An action or activity scheduled to be completed within a specified time. Tasks can be standalone, or they can be associated with answers, campaigns, contacts, documents, incidents, mailings, opportunities, organizations, surveys, and stages in a sales strategy.

task custom field

A field for gathering and displaying additional information about tasks. Task custom fields appear when adding or editing a task.
**task inheritance**

A feature for linking a task’s assigned staff member, contact, or organization to the equivalent value in a record associated with the task.

**task status**

A method of tracking a task’s state. The default task statuses are Not Started, In Progress, Completed, Waiting, and Deferred.

**Techmail**

A scheduled utility that retrieves mail from specified POP3 mailboxes. Service processes some of the mail into new incidents and routes the incidents using business rules (depending on settings). Outreach and Feedback process bounced messages to assist in tracking incorrect email addresses.

**template**

A structured format used in a document in which specified sections are locked and cannot be edited and a section is open for customized content. The customer portal also uses templates to apply a uniform style to individual pages of the support site. Templates are also available as a starting point for creating a workflow’s flow diagram, and templates can be added for community groups and hives.

**territory**

A specific geographical sales region configured in Opportunity Tracking. Sales representatives can be assigned specific territories for opportunity assignment. Up to twelve levels of territories can be defined.

**test message**

A mailing message that can be sent to small cross-sections of an audience to test a response before launching a final message.
**text explanation**

A text field that can be associated with a response in a guided assistance guide. The text explanation is displayed after an agent selects the associated response from a question in the guide. See Guided assistance.

**text field**

A customizable field containing text that is commonly added to reports. Once a text field is created, it can be added to any custom report and then adjusted as necessary.

**text matching**

A feature in Offer Advisor that enables agents to search for specific terms that best express the customer’s interests. After a search, the list of promotions and suggestions on the Offer Advisor window will be reordered, and the ranking of each will reflect its relevance to the terms entered by the agent. See Offer Advisor.

**text question**

A question type that allows customers to type their answer to a question.

**theme**

A group of related text responses to a survey question. Themes are created by topic monitoring and identified by common keywords. Themes are also used in social monitoring to group related cloud search results and in the customer portal to apply CSS styling to multiple elements of a support site by applying a single theme. See Oracle RightNow Customer Portal Cloud Service, Oracle RightNow Social Monitor Cloud Service, and Topic monitoring.

**third-party screen pop**

A feature that lets staff members open a Service Console or report from a third-party application. See Service Console.

**Time Billed**

A way to track the time spent responding to incidents. Data from the Time Billed field can be used for customer billing and for determining average incident resolution time.
Tool window

A default interface control on the Service Console for accessing reports, records, and items, and for searching the knowledge base. Recent Items and Navigation tool windows appear on the left navigation pane, and the Quick Search tool window appears on the right navigation pane. Tool windows can be put in any order, displayed in separate, floating windows, or removed from the console.

topic browsing

A feature that provides clustering and guided browse functionality on the customer portal so customers can browse specific topics to find related answers.

topic monitoring

A process that groups survey text responses into clusters of related responses called themes and labels each theme with keywords that define the responses. Topic monitoring is also used in social monitoring to group related cloud search results. See also data mining and themes.

tracked link

A link that can be tracked by Outreach and reported on for statistical purposes.

tracked link category

An option for classifying tracked links for reporting purposes. A tracked link category can have one subcategory level.

transactional mailing

A mailing that is sent only when an event occurs. Transactional mailings are sent to a contact when the contact meets specified criteria in a campaign and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.
transactional survey

A survey that is sent only when an event occurs. Transactional surveys are sent to a contact when the contact meets specified criteria in a campaign or business rule and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.

transfer

A feature in Chat that enables an agent to transfer a customer to another agent during a chat session.

trending

A method of predicting a trend for a specified date range in the future based on a report’s current data. Trending periods are defined when creating or editing a custom report and can be included in standard reports.

trigger

The part of a script or workspace rule that defines the event that causes the rule conditions to be evaluated and (if matched) the rule action to occur.

Unqualified

One of the default chat agent statuses. This status indicates that the agent is not available to chat. The Unqualified chat agent status has an Unavailable status type.

Unresolved

One of the default incident status types and statuses. Incidents with an Unresolved status have recently entered the system, either by a customer or by an agent.

Unrestricted

One of the default chat agent statuses. This status indicates that there are no restrictions to the agent’s availability to chat. The Unrestricted chat agent status has an Available status type.
Unspecified

One of the default chat agent statuses. This status indicates that the agent is logged out of Chat. The Unspecified chat agent status has a Logged Out status type and is displayed to agents by default.

Unsubscribe link

A link in a mailing that contacts can click to opt out of future mailings or surveys.

Updated

One of the default incident statuses. An incident marked Updated has been updated by a customer from Your Account. Updated incidents have an Unresolved status type.

Upgrade site

A site created during the upgrade process. It has the latest version of the software, and data from your current production site. You can use it to test, configure, and prepare your site for the upgrade.

upgrading

The process of moving from one release of Oracle Service Cloud to a newer release. See also migration.

Upgrade Management System (UMS)

A dynamic checklist tool that guides you through a series of tasks that test the core functionality of your upgraded site.

URL answer

A type of answer that consists of a link to an external URL. The URL address and the content of the web page are displayed.
user agent settings

The shortcut on the customer portal administration dashboard that allows page set mapping. See also page set mapping.

User link

A navigation element on community pages containing links to the logged-in user’s profile, inbox, favorites, and subscriptions, and a sign-out option.

user type

The community role of a member account as defined by the nature of actions that the member is permitted to take.

utility

Any of a number of programs in Oracle Service Cloud to help manage and configure an installation. Utilities include Agedatabase, Bulkdel, Dbaudit, Dbstatus, Kexport, Kimport, Langcvt, Msgtool, Reportgen, Techmail, and Wltool.

validation

The process of error-checking items such as desktop workflows, scripts, rules, advanced surveys, and campaigns. Items are validated to ensure that all required properties have been completed and that the configuration is functional. Oracle Service Cloud also validates email addresses for industry-accepted formatting.

variable

A temporary data item in a rule base. The variable is assigned an initial value that can be modified through rule actions, used as a rule condition to trigger other actions, and restored to its initial value for the next round of rules processing. Variables also refer to shortcuts defined for a larger string that can be inserted in the body of an answer or inserted inline during a chat session. When the variable is inserted in the body of the answer or in a chat response, it is replaced with the value specified in the variable.
**versioning**

The system of numbering the Customer Portal framework and widgets to denote varying levels of changes. Major and minor changes are not backward compatible, while nano changes are applied automatically to all Customer Portal installations.

**view partial**

A reusable segment of code for common functionality that can be called from widget views to avoid duplicating the same code in multiple widget view files.

**virtual assistant**

A process of routing incoming chats to a simulated agent that uses knowledge base data to respond to customer questions. Virtual assistant chats can ease the volume of chats requiring an agent. See Oracle RightNow Virtual Assistant Cloud Service.

**visibility**

A setting that determines where a custom field or customizable menu item will appear. Visibility settings specify the interfaces in a multiple-interface installation where these fields appear. The settings can also define whether the fields appear on the administration interface and customer portal and whether certain custom fields with customer visibility can be edited.

**visit**

See Web visit.

**Waiting**

One of the default incident status types and incident statuses. An incident marked Waiting has been responded to by a staff member and is waiting for a response from the incident creator.
**web form**

A document in Outreach that allows contacts to input information that can be submitted to the database. Web forms are served as web pages by Oracle Service Cloud.

**Web Indexer**

A search method that lets customers simultaneously search the knowledge base along with web pages and other web-accessible documents within a specified domain.

**Web spider**

A software application that reads web pages and other documents and indexes the content for a search engine, often following hyperlinks from one web page to another.

**web visit**

The period of time a customer spends looking for a satisfactory answer to a question. The end of a web visit generally occurs when a customer closes the browser or leaves the interface or when a specified time period elapses.

**web visit tracking**

A feature that tracks information about a customer's current web visit. That is, it tracks the pages on the customer portal that the customer clicked before submitting a question.

**website link survey**

A type of survey that is published as a web page and can be linked to from any source.

**weight**

A displayed value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search. Weight also refers to an internal value given to each indexed keyword for an answer or incident. The value is relative to a constant and is based on number of occurrences, capitalization, and location of the word (ranked high to low: Keywords, Summary, Question, and Answer field for answers; Subject field and incident thread for incidents).
**widget**

A collection of files that generates a specific function when it is placed on a page of the customer portal. Widgets can be buttons, fields, reports, or other elements that can access the Oracle Service Cloud database and communicate with other widgets through events or to the server through AJAX requests.

**widget builder**

A tool that generates custom widget code, including placeholders to allow additional editing of the code. The widget builder, accessed on the Customer Portal Administration site, can extend an existing widget or create a new one.

**Win/loss reason**

An option for classifying and recording reasons for winning or losing an opportunity.

**Wltool**

A utility that is manually run after making changes to one of the wordlist files. See Wordlist file.

**word stemming**

A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.

**wordlist file**

Any of the files that can be modified to customize indexing, text searching, and SmartSense emotive ratings. See File Manager.

**workflow**

See Desktop workflow.
workgroup

All of a record’s open, associated records (for instance, an incident’s contact, organization, and tasks) that are docked to the Service Console. All records in a workgroup are saved and closed in a single operation. When another non-associated record is opened, the records in the workgroup are collapsed on a single content pane tab.

working record

The record being evaluated or acted upon by a workflow element or connector. For instance, a workspace element can display the first or last record opened in the workflow or a record named elsewhere in the workflow. See Desktop workflow.

workspace

The configuration of the content pane when working with answers, contacts, incidents, opportunities, organizations, and tasks; when working in Chat; and when working with quotes, quote products, and service opportunities. Standard workspaces exist for each type of workspace, and custom workspaces can be created. The workspaces staff members use depend on the workspaces selected in their profile.

workspace rules

A type of rule used to dynamically adjust the display, behavior, and values of fields and controls on a workspace based on staff member actions. Each rule is triggered by one or more events and conditions.

Workspace designer

The tool used to create and edit custom workspaces.

WYSIWYG (what you see is what you get)

See HTML editor.

Your Account

A tab on the customer portal that opens the Account Overview page where customers can view and update all the questions they have previously submitted and view any answer or product/category notifications to which they are
subscribed. They can also view their service contracts, edit their account information, and change their password. This component is restricted and requires a customer account. See Customer account.