

Oracle Fusion Cloud Applications

**Fusion Service Questions and
Answers**



Oracle Fusion Cloud Applications
Fusion Service Questions and Answers

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Author: JKOLB

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Get Help

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Get Help

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

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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

Thanks for helping us improve our user assistance!

1 Questions and Answers

How can I prevent a new SR from being created when a customer replies to an email notification that's set up using groovy scripts or object workflow?

For all outbound emails generated by your service application, the message ID or SR number are automatically added at the end of the email in the format `{##Messageid##}` or `{##SrNumber##}` respectively. When someone replies to such an outbound email or forwards it, the application uses these values to identify the parent SR.

But let's suppose you've created a groovy script or an object workflow to send an email notification when an SR is resolved. And this notification doesn't have the `{##Messageid##}` or `{##SrNumber##}` tags at the end of the message. So when your customer's SR is resolved, they receive a notification without the identifying tags. Now let's say the issue recurs for the customer. Instead of replying to an earlier mail thread, they may reply to this notification. Then the application isn't able to identify the original SR because it doesn't contain the tags at the end of the notification. So the application considers it as a new SR. The same issue occurs if someone forwards that notification back to the application.

To prevent the application from creating new SRs in such situations, you must do the following. At the end of the message content of your outbound email notification, ensure that you add either the message ID in the format `{##Messageid##}` or the SR number in the format `{##SrNumber##}`.

Note: You can verify the exact format of these tags from any sample acknowledgment email that's sent after an SR is created from an inbound email.

How do I create a custom field?

Create a custom field in Application Composer if you want changes retained to the database. Custom fields created in VB Studio are read only.

This example shows you how to create a custom field using Application Composer.

We'll create a new field for the Service Request **Category** object. Say you want to extend this object with a custom field that's specific to your business needs. In addition to creating the custom field in Application Composer, you'll also need to add the custom field to the appropriate layout which is described in the following section. When both of these steps are performed, then the new field can be exposed in the Manage Service Request Categories List page.. You might also want to make the content entered into this custom field searchable. Here's how you do it:

Note: You'll need to create and activate a sandbox to perform this task. Use the same sandbox used for this task when you add the field in VB Studio, which is described in the next task.

1. Sign in to your application as an administrator.

2. Click **Navigator > Configuration > Application Composer**.
3. Expand the **Standard Objects** list, then expand the **Category** object node.
4. Click **Fields**.
5. On the Fields screen, click the **Custom** tab, then click the **Action** drop-down list and select **Create**.
6. Select **Text** because for this example, we'll just create a text field.
7. Click **OK**.
8. In the Create Text Field screen enter the field name into the **Display Label** field.
The Display Label field displays the field name in the UI. The Name field auto-fills after you complete the display label, and is only for internal use. It won't be displayed in your UI.
9. Choose the number of characters you want to allow in the new text field.
The default number of characters is 30, but you can set it for less or for more.
10. If you want the field to be searchable, select the **Searchable** check box in the Constraints area.
11. Click **Save and Close**.
12. To add the field in VB Studio, follow the steps in the next procedure.

How do I assign users to a user group in Knowledge?

Knowledge management has user groups that you can use to control who can see which articles in the knowledge base. Users assigned to a user group can only access the articles targeted for that user group. The predefined user groups help in segregating articles that should only be viewed by users within the organization. You can create custom user groups to segment content for additional audiences.

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

You can create, update, and delete user groups to control access to published knowledge articles. You must have the knowledge manager role, or a similar role that includes the Knowledge Setup and Maintenance privilege to create user groups.

1. Go to Setup and Maintenance.
2. Select the **Service** offering and select **Knowledge Management**.
3. Select the **Manage Knowledge User Groups** task.
4. Select **Service** from the **Department** menu and click **+** to add a new user group.
5. Enter a unique name and reference key for the user group.
6. Click **Create**.

Note: To grant a user access to any content that is assigned to a user group other than EVERYONE, you must assign the user a role that:

- grants access to the intended department
- grants access, with a Data Security Policy, to one or more user groups

Define a User Group Data Security Policy in a Role

You must have privileges to access the Security Console to perform these tasks.

You can edit a role to add a data security policy for the user group you have created.

1. Go to **Tools > Security Console > Roles** page and locate and open the role that you want to add the user group data security policy to.
2. Copy the role and go to the Data Security Policies page.
3. On the Data Security Policies page, click **Create Data Security Policy** and change the start date if you need to.
4. Enter a policy name.
5. Search for and select the database resource for which you're defining the policy, for example, search for Knowledge User Groups.
6. For Data Set, select **Select by key**.
7. Enter the user group reference key in the **Select a primary key value** field.
8. In the **Actions** field, select **Access content with User Group**.

You can view the new policy on the Data Security Policies page by scrolling to the end of the list of policies. You can accept the default role hierarchy and click **Next** to continue. The user group data security policy will apply to users who have the role that you updated.

Assign the Updated Role to Additional Users

You can add users to the role that has the new user group data security policy as needed. See the [Oracle Fusion Cloud Customer Experience Securing Sales and Fusion Service](#) guide for additional ways of assigning users to roles.

1. On the Update Role: Users page, click **Add User**.
2. In the **Add User** dialog box, search for and select a user or role.
 - o Select a single user to add only that user to the role, then click **Add User to Role** to add the user.
 - o Select a role to add all of users assigned to it, then click **Add Selected Users** to add them.
3. Click **Submit**.

The Create Role: Users page shows the updated role membership.

How do I add a custom field created in Application Composer?

Use this topic to add a custom field you created in Application Composer. Fields that you create in Application Composer allow you to retain changes to the database, whereas custom fields created in VB Studio are read only.

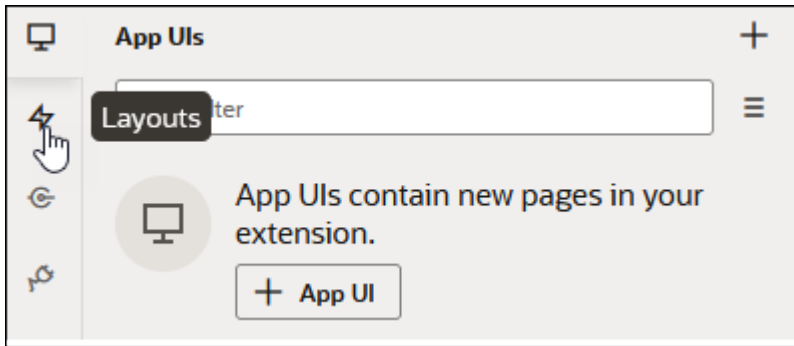
This topic shows you how to add a custom field that you created in Application Composer to a layout in VB Studio.

Before you start

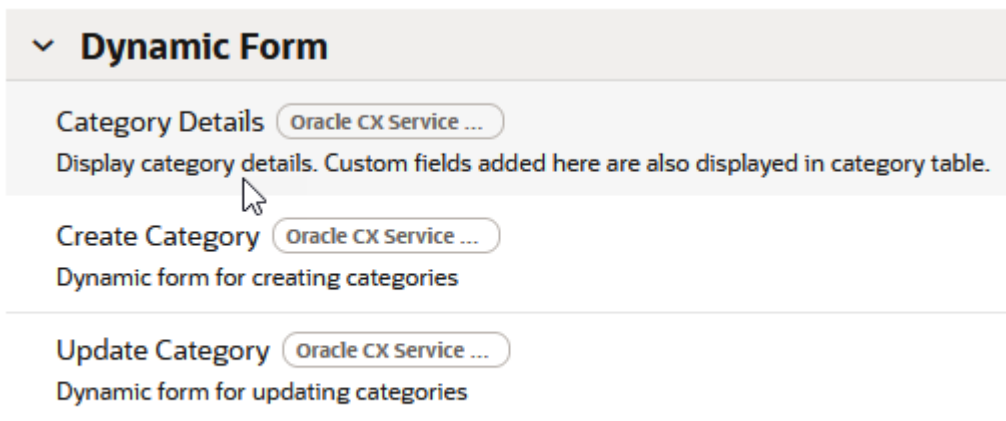
Make sure VB Studio is connected to the same sandbox that you used when creating the custom field.

Here's what to do

1. In VB Studio, click the **Layouts** icon in the explorer.



2. Find the object you want to add the field to.
3. In this example, we'll use the **Categories** object, so click that object.
4. Display the rule sets, and then choose the one you want to add the field to.
5. For this example, choose **Category Details**.



6. Duplicate the form using the following task: *How do I duplicate a form in Visual Builder?*
7. Open the duplicate you created.
8. The workspace displays the fields that are contained in the form, and those that can be added.
9. From the list of available fields, find your new field, using the filter field to search if necessary.
10. Drag the new field to the form, and position it in the order you want. You can use *How do I add, hide, or rearrange fields?* for reference.
11. The field is now added to the form. Click the **Preview** button to view your changes in the application UI.

What are service request classifications?

When your customer sends a service email for a new issue, the email is converted to a Service Request (SR). You can quickly classify SRs by auto-populating the Product, and Category fields. Use the Service Request (SR) Classification feature, which applies to requests created by the inbound email channel, to streamline the overall process of categorizing and assigning SRs.

The request should have its Title, Problem Description, and Primary Point of Contact prepopulated. However, fields such as **Category** and **Product** that are useful in routing the request to its proper queue and assignee are blank. By enabling the Service Request Classification feature, the **Product**, and **Category** can be auto populated when the request is created. The agent doesn't need to populate it manually. This feature applies to requests created by the inbound email channel.

Note: This feature is currently available for English language only.

Attribute predictions come from the Adaptive Intelligence (AI) applications platform that's already provisioned for you.

Here's a brief outline of how the SRs are classified:

1. The database contains records of all resolved requests created from past inbound emails. These requests have either product, category, or both already populated. Resolved requests are considered correct for building the Machine Learning (ML) model within the AI application.

Note: Correct model predictions rest on the fact that historical resolved requests have correct labels.

2. You must activate the tenant from the Configure SR Classification Using Adaptive Intelligence page. After you activate the tenant, data from closed requests is imported by the AI application.
3. The AI model automatically learns, so it returns the predicted product or category based on data from closed requests in Fusion Service.
4. Based on analysis of the subject line and body of the email, the model classifies requests and returns products and categories that have the highest confidence.
5. While reviewing the assigned request, an agent can manually update the AI-labeled fields, if required.

How do I run the Publish Feed Elements job to index activities?

During initial Service setup, the activities for all your existing records are blank. You must run the Publish Feed Elements job to populate activities for each record with the date and time of the record was created. The process also publishes the indexes required for the Adaptive Search to track activities for all the objects that have activities enabled. You can't run the process separately for individual objects.

Note: You run this process only once during initial Service Center setup.

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, leave the type as **Job**.
4. In the **Name** field, type **Publish Feed Elements**, and press **Enter**.
5. Make sure that the **Production to Test Enabled** check box is unselected. You use this option only to migrate the activity indexes from production to test as part of your data migration.
6. Continue to the next steps. Or, just skip to the steps for finishing the submission, to run the process once as soon as possible with the default output.

Which records get populated with activities?

The Publish Feed Elements process populates activities in records that meet the following criteria:

Object	Criteria
Account	All accounts of type Customer and Prospect with any tasks and appointments added in the last 300 days.
Contact	All contacts that were updated in the last 300 days.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Account

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from the current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in Completed status that has passed the due date 180 days from current date
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Contact

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from the current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in Completed status that has passed the due date 180 days from current date
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

The process also populates activities for child objects of the objects that meet the preceding criteria.

Service Request

Child Object	Criteria
Audit	Audit log that shows the Created By and Updated By information for the service request record.
Messages	All service request messages of the following type: <ul style="list-style-type: none"> • Customer Entry • Response • Internal Note • Forwards • System Note • System Response
Interactions	Interactions for all SRs where StatusCd = "ORA_SVC_CLOSED" AND ChannelTypeCd IN ["ORA_SVC_CHAT","ORA_SVC_PHONE"]

Note: After this process has completed, you must set the ORA_ZCA_ENABLE_SIGNALS profile option to Yes.

Where do I find resources for Oracle Fusion Service Analytics?

Here's where you can find *additional information* on Fusion Sales, Service, and Help Desk analytics:

- *Prebuilt Fusion Service analytics* spreadsheet.
- *Creating and Administering Analytics* guide.
- *Subject Areas for Transactional Business Intelligence in Fusion Sales and Fusion Service* guide.
- *Security for Sales Analytics and Reports* guide.
- *Securing Sales and Fusion Service* guide.
- *Oracle Transactional Business Intelligence* guides.
- *Fusion Service Report Sharing Center* cloud customer connect.
- *Analytics and Reporting Best Practices* support resource center.
- *R13.x CX OTBI Subject Area to Database Lineage Mapping Spreadsheet*
- *About Creating Your Own Subject Areas*

What are the Activities setup tasks?

Here's a summary of the steps to set up activities in your environment.

Activities Setup Tasks

Step	Description	Navigation and other details
1	You must create and activate an activities configuration for each object you use. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object. To use the predefined configuration, just copy it and activate it. To change what gets displayed in Activities for an object, you can edit your copy before activating it.	Navigator > Configuration > Configure Activities Display <i>How do I create and activate a service request activities configuration?</i>
2	Make sure the profile option Set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) is set to No. This profile is set to the value you want by default, so you might be able to skip this step.	From Setup and Maintenance , choose Service . Then click the Tasks icon and select the Search link. Search for Manage Administrator Profile Values .
3	Run the Publish Feed Elements process to create the index required by Adaptive Search.	Navigator > Tools > Scheduled Processes <i>How do I run the Publish Feed Elements job to index activities?</i>
4	After the Publish Feed Elements process completes, set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) profile option to Yes.	From Setup and Maintenance , choose Service . Then click the Tasks icon and select the Search link. Search for Manage Administrator Profile Values .

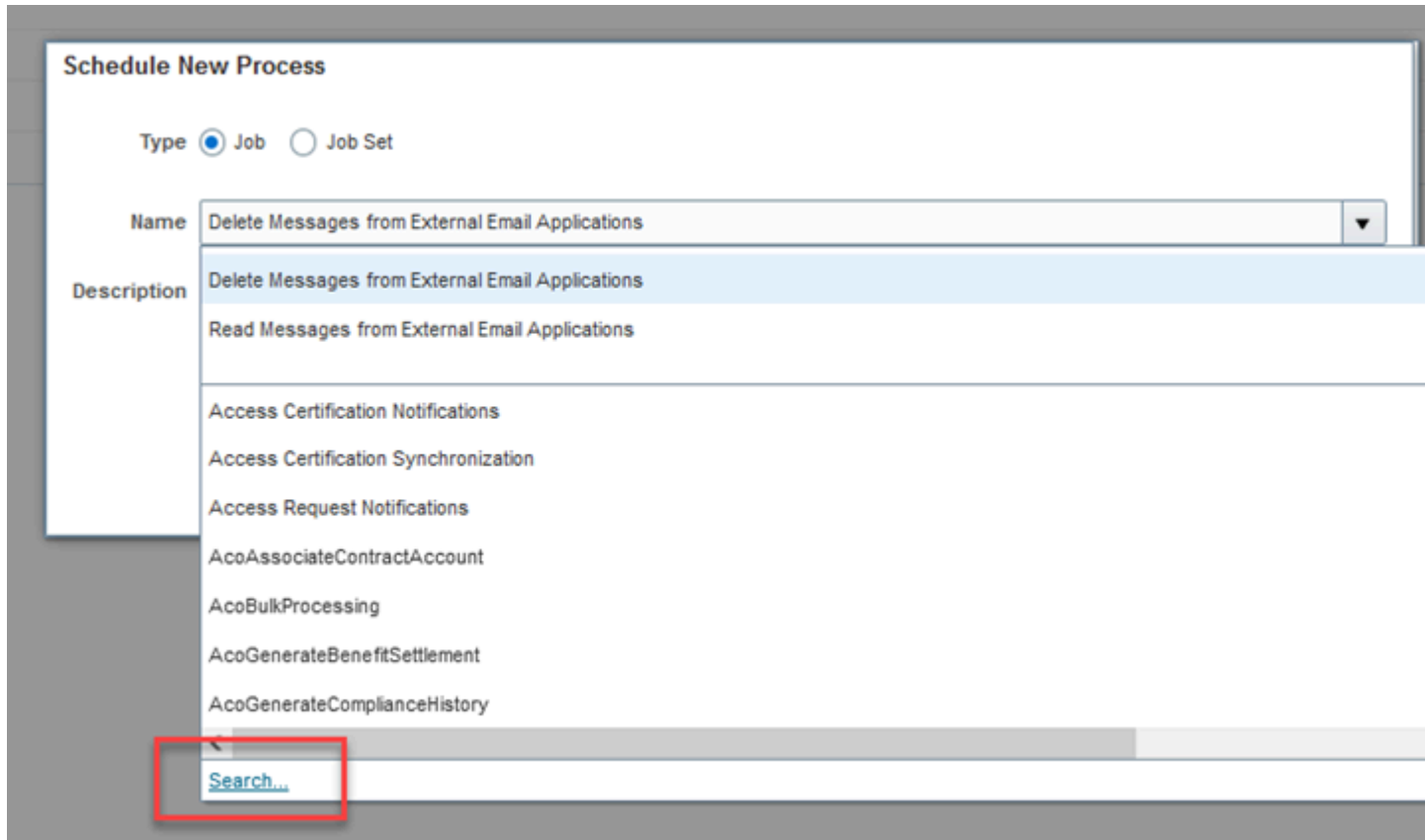
How do I create a job to read messages?

Now, you create an Oracle Enterprise Scheduler (ESS) job to periodically read the email messages from the configured outlook email address.

This process stores all the required details of an email in your database. After reading the required number of emails in a batch, a new event is generated to create an SR or an SR message using the existing SOA composite.

Here's how you create the new job:

1. From the Navigator, select Tools, then **Scheduled Processes**.
2. Click **Schedule New Process**.
3. From the Schedule New Process dialog box, click the drop-down list, and then click the **Search** link.



4. On the Search and Select: Name dialog box, enter any part of **Read Messages from External Email Applications** in the **Name** field, and then click **Search**.
5. From the results, select **Read Messages from External Email Applications** and click **OK**, and then click **OK** again.
6. On Process Details page, click **Advanced**, then in the **Advanced Options** area, select **Using a schedule**, then set a time, such as every 1 minute, every 2 minutes, or whatever time increment suits your needs.
7. When you're finished, click **Submit**.

How do I create cases or SRs by interview?

You can have your users create service requests through an interview-style format using Oracle Intelligent Advisor. Using an interview to create service requests, can ensure service requests are created only after all critical questions are answered.

To create service requests by interview, you use Intelligent Advisor to create the interview, then Visual Builder Studio to make the interview available to your users.

Note: This feature requires a license for Oracle Intelligent Advisor.

The steps to enable and use the **Create Service Request by Interview** button on the Service Requests List page.

1. Open the Service Request List page in Visual Builder Studio and find the Constants tab in the Right Hand Panel.
2. Click the **Constants** tab.
3. Set the values for the these variables on the **Constants** tab:
 - a. showCreateSRByInterviewButton: true
 - b. opaSiteURL: Enter the Intelligent Advisor Hub URL where your interview is deployed.
 - c. createSRInterviewDeploymentName: Enter your interview name.
4. Publish the changes.

How do I schedule deletion of inbound emails that were previously retrieved from Exchange Server?

You can set up a scheduled process to automatically delete inbound emails from the inbox on your Microsoft Exchange server if those emails have already been retrieved and processed. This job increases performance if you're integrated with Microsoft Exchange Server, by removing unnecessary processing.

Here's how you do it:

1. In Setup and Maintenance, do the following:
 - o Offering: Service
 - o Functional Area: Communication Channels
 - o Task: Manage Email Configuration, Registration and Validation
2. In the Configure External Applications section, select the **Delete Message** check box.

This ESS job, **Delete Messages from External Email Applications**, deletes inbound email from the inbox on Exchange Server, and it will now automatically run according to the schedule set by the administrator.

How do I delete messages from external email applications?

Use this scheduled process to delete inbound messages from external email applications.

When to Use

Use this schedule process to delete emails from the Microsoft (MS) Exchange server after they've already been read. Note that this schedule process is only for the Microsoft Exchange server and not for any other external email application.

This schedule process supports integration of the application to the Microsoft Exchange server for the processing of inbound emails. When configured, the Oracle Fusion Application reads inbound emails directly from the MS Exchange inbox. You can configure and run this schedule process to delete emails in the inbox that have already been read to improve performance and keep your inbox clean.

Note: You can't manually run this schedule process. You can only enable this option. Perform the following steps to enable this delete:

1. Navigate to Setup and Maintenance work area and
 - o Offering: Service
 - o Functional Area: Communications Channels
 - o Task: Manage Email Configuration, Registration and Validation
2. Select the Delete Message option on the Configure External Applications page.

Privileges Required

Verify that you've the following privilege or role:

Role

- Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - o The frequency of this schedule process is decided by the application and isn't configurable .
- Execution Time:
 - o The execution time depends upon the number of mails to be deleted.

Parameters

None.

Troubleshooting Information

- Administrators will see in the Scheduled Process page if the sync process failed.
- If this sync process doesn't complete successfully, you might see your meetings and Emails from Outlook in the application.
- Verification that the delete process ran successfully can be done by checking if there are no mails in the inbox.

How do I define data security policies for custom roles?

There are data security policies available for interactions which enable you to do the following:

- Provide self-service users a view of interactions where they're the primary contact.
- Provide service users a view of all service interactions.
- Provide help desk users a view of all help desk interactions.

These policies are available with the predefined duty roles as listed in the following table. You can also add these policies to custom roles.

The following table lists the data security policy Service Interaction Header and its enforcement across predefined duty roles.

Duty Role		Business Object	Condition
Customer Self-Service Usage	Can Manage	Service Interaction Header	For all my interactions
Service Request Administrator	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Channel User	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Contributor	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Power User	Can Manage	Service Interaction Header	For all CRM interactions
Service Request Troubleshooter	Can Manage	Service Interaction Header	For all CRM interactions
Conversation Message Management	Can Manage	Service Interaction Header	For all CRM interactions
Conversation Message Administration	Can Manage	Service Interaction Header	For all CRM interactions
HR Help Desk Administration	Can Manage	Service Interaction Header	For all human resource interactions
HR Help Desk Service Request Management	Can Manage	Service Interaction Header	For all human resource interactions
HR Help Desk Analysis	Can Manage	Service Interaction Header	For all human resource interactions
Internal Service Request Administration	Can Manage	Service Interaction Header	For all human resource interactions
Internal Service Request Analysis	Can Manage	Service Interaction Header	For all human resource interactions
Internal Service Request Management	Can Manage	Service Interaction Header	For all human resource interactions
HR Service Request Analysis	Can Manage	Service Interaction Header	For all Help Desk interactions

Duty Role		Business Object	Condition
HR Service Request Administration	Can Manage	Service Interaction Header	For all Help Desk interactions
HR Service Request Management	Can Manage	Service Interaction Header	For all Help Desk interactions

If you've created a custom job role, you must add one of the Data Security Policies mentioned in the previous table.

Here's how you do it:

1. On the **Roles** tab of the Security Console, search for and select your custom role.
2. In the search results, click the down arrow for the selected role and select **Edit Role**.
The Edit Role: Basic Information page is displayed.
3. Click the **Data Security Policies** train stop.
4. Click **Create Data Security Policy**.
The Create Data Security Policy dialog box is displayed. A Start Date value is automatically assigned to the policy but can be changed.
5. In the **Policy Name** field, enter a policy name.
The names of predefined data security policies begin with the words Grant on.
6. Search for and select the database resource **Service Interaction Header**.
7. In the Data Set field, select **Select by instance set**.
8. Select a Condition Name.
9. In the **Actions** field, select the actions to which this data security policy applies.
Note: The Manage, Update and Read Actions are required for Chat or Call Center Agents.
10. Click **OK** to save the data security policy.
11. Click the **Summary** train stop.
12. Click **Save and Close** to save the role.
13. Click **OK** to close the confirmation message.

How are SRs deleted and how can I recover an SR that was deleted by mistake?

When work is completed on a service a user marks it Resolved. SRs marked Resolved can still be accessed and edited. After a predefined number of days, a background process sets the SR status to Closed. Closed SRs can't be viewed or updated.

The Purge Deleted Service Requests job permanently deletes closed SRs. You set the number of days until a permanent delete using the SVC_SR_IN_DELETED_DAYS profile option. The job to delete the data permanently is Purge Deleted Service Requests. In addition to service requests it also purges all the associated child records.

Here's an example: say, you set the profile option SVC_SR_IN_DELETED_DAYS to 365 days. When a service request is marked Closed it can't be viewed. But the data isn't permanently deleted by the Purge Deleted Service Requests job for 365 days.

How can users access both Sales and Service apps?

When you receive your Oracle Cloud application, access to its functionality and data is secured using a role-based access control security model. In a role-based access control security model, you provide users with roles which are assigned access privileges to protected resources. As long as users have the necessary roles, they can access both applications.

Oracle provides many predefined job and abstract roles as part of the security reference implementation for the sales and service applications.

Sales Roles

Here's some predefined job roles for sales users:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Customer Contract Administrator
- Customer Data Steward
- Customer Relationship Management Application Administrator
- Data Steward Manager
- Enterprise Contract Administrator
- Enterprise Contract Manager
- Incentive Compensation Manager
- Incentive Compensation Plan Administrator
- Incentive Compensation Analyst
- Inside Sales Manager
- Inside Sales Representative
- Marketing Manager
- Marketing Operations Manager
- Marketing VP
- Master Data Management Application Administrator
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Catalog Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative

- Sales VP
- Supplier Contract Administrator

You also assign the following abstract roles to sales users who are employees so they can carry out their work:

- Employee
- Resource

If you're using the Incentive Compensation functionality, you can also assign the following abstract roles to users:

- Incentive Compensation Participant
- Incentive Compensation Participant Manager

Service Roles

Many job roles and duty roles are predefined in the Service offering. These are the predefined job roles specific to this product area:

- Chat Agent
- Customer Service Manager
- Customer Service Representative
- Knowledge Analyst
- Knowledge Manager
- Field Service Technician
- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Case Manager
- Case Worker

Guidance for Assigning Predefined Roles

As a security administrator, you've access to the predefined roles and privileges that are readily available for assignment. However, you must assess the user's need before assigning those roles as is with the complete set of privileges.

Note: Be extremely cautious when assigning predefined roles as-is. "Advisory Note on Subscription Impact" in the *Security Reference for Common Features* guide.

When you assign predefined roles and privileges as is, you're entrusting users with full access to all data and functionality. Such unrestricted access without identifying the business need might pose a security concern. Also, the assigned privileges might account for subscription consumption irrespective of whether you bought the cloud service or not. A detailed list of all the predefined roles that impact subscription is available for reference. See the spreadsheet *Predefined Roles with Subscription Impact*.

If you're aware of a requirement or recommendation to assign specific predefined roles as is, it's fine to do so. For example, only while setting up an application, you might need to assign the predefined Application Implementation Consultant role as is. Once the setup is complete, you can unassign it. Otherwise, the recommended process is to always

make a copy of the predefined role, remove the privileges you don't need, and assign only the required privileges. That way, you'll hit the subscription usage in a controlled way, based on your business need.

Note: Updates to Oracle Fusion Applications might also include changes to certain predefined roles. Check the release readiness documents for your product area to know if there are any updates to the predefined roles that are in use. If you find changes that are relevant, incorporate the same changes into your custom role. This will remain an ongoing maintenance activity for the custom roles.

For more information, see the "User and Role-Provisioning Setup Options" and other related topics in the *Securing Applications* guide.

See the *Security Reference for Sales and Fusion Service* guide for a complete list of roles and privileges in Sales and Fusion Service.

How do I hide quick actions from the home page?

You can change the Fusion application homepage to hide quick actions from view. Here's an example showing you how to hide the Create Service Request quick action.

Here's how you do it:

1. Sign in to your Fusion application as an administrator and go to **Application Composer**.
2. Click Navigator > Configuration > Sandboxes to create a new sandbox.
Note: Make sure you select the Structure tool and Application Composer from the All Tools list.
3. When finished, navigate to the **Structure** page (**Navigator > Configuration > Structure**.)
4. Click the node where you want to hide quick actions from, for example **Service**.
5. On the **Edit Group** page, click the **Quick Actions** tab.
6. Expand the **Service Center Quick Links** list.
- 7.
8. In the Quick Actions list, click **Create Service Request**.
9. On the **Edit Quick Action** dialog box, click the **Visible** drop-down list and select **No**.
10. Click **Save and Close** and then view your home page to verify the result.

How do I add a custom field to the landing page for Adaptive Search?

Use these instructions to add a custom column to the Helpdesk or Fusion Service landing page for Adaptive Search.

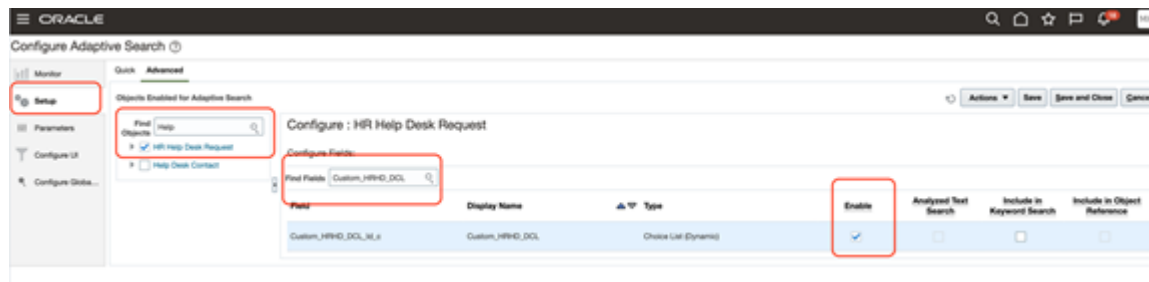
Create a Custom Field or Confirm it's Published

1. In your application, click Navigator, then, **Configuration**, and then select **Sandboxes**.
2. Create a new sandbox and make Application Composer active.
3. Open Application Composer.

4. In the explorer, search for Service Request or Help Desk object based on your need.
5. Expand the selected object and click **Fields**.
6. Create a new custom field, or just make sure the field you want to add is there and published.
For more information on creating a custom field, see *How do I create a custom field?*

Make the Field Searchable

1. In the Setup and Maintenance work area, make sure Setup: Service is selected.
2. Select the **Productivity Rules** row, then in the task list, select **All Tasks** from the **Show** menu.
3. Click the **Configure Adaptive Search** link.
4. In the explorer, choose **Setup**.
5. Click the **Advanced** tab.
6. Find the object and the field, and select the **Enable** check box.

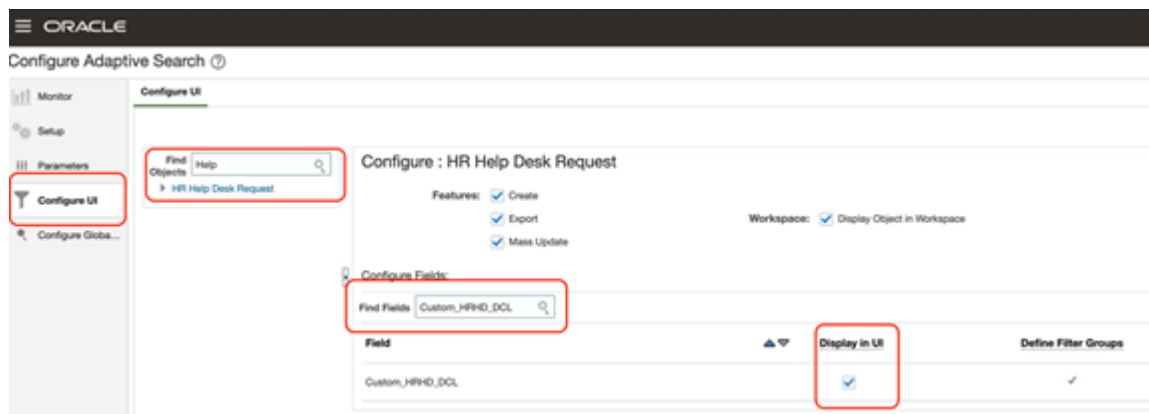


Now the field will be indexed for adaptive search.

7. Click **Save**.
8. Click the **Actions** drop-down list and select **Full Publish** to retain the change.

Add the Field to the UI

1. On the Configure Adaptive Search work area, click **Configure UI** in the explorer.
2. Find the object you want to add a new column to the landing page
3. Find the field of that object that you want to add.
4. If the **Display in UI** check box is isn't checked for that field, select it to the display the field in the landing page.



5. Click **Save and Close**.

Expose the Field in the UI Landing Page

For this example, we'll add the field to the My Open Service Requests area in Service Center.

1. Navigate to Service Center, and in the My Open Service Center page, click the **Actions** menu and select **Manage Columns**.
2. Query for the custom field and select the check box.
3. Drag the field to where you want it to appear on the list page.
4. Click **Save**.

How do I add articles as favorite?

You can implement favorites so that users can bookmark frequently-used articles. Favorites provides users with quick and easy access to the articles they use most often.

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

You must have the knowledge manager role, or a similar role that includes the Knowledge Setup and Maintenance privilege to enable favorites.

To enable favorites:

1. Go to **Setup and Maintenance**.
2. Select the **Service** offering and select **Knowledge Management**.
3. Click any of the following:
 - o **Manage Knowledge Common Profile Options**
 - o **Manage Knowledge Panel Profile Options**
4. Click **CSO_ENABLE_KNOWLEDGE_FAVORITING**.
5. Set the **Profile Value** at Site level to **Yes**.
6. Click **Save and Close**.

Your users can now add articles as their favorite articles.

To add an article as favorite:

1. Navigate to **Knowledge > My Knowledge**.
2. Search for the article.
3. In the search results, click the star icon next to the article to add it as favorite.

How do I make the File Import and Export task visible in Navigator?

You can change **Navigator** to expose the Import and Export task by doing the following:

1. Sign in to your application as an administrator.

2. Click **Navigator > Configuration > Sandboxes**.
3. Create a new sandbox and make sure the **Structure** tool is enabled.
4. Save the new Sandbox.
5. Click **Navigator > Configuration > Structure**.
6. Find File Import and Export in the list, and select it.
7. On the Edit Page Entry workspace, select **Yes** for the following two items:
 - o Show in Navigator
 - o Show in Springboard
8. Click **Save and Close**.
9. Publish the sandbox, then sign back in and click **Navigator > Tools > File Import and Export** to verify your changes.

How can I restrict certain file formats from being uploaded?

You can use the **Manage Attachment File Formats** setup task in the Setup and Maintenance work area.

Use this task to configure the file formats you want to restrict from being attached. Here's how you access the task:

1. In the Setup and Maintenance work area, click the **All Tasks** icon and click the **Search** link.
2. In the search field, enter **Manage Attachment File Formats**, then click the task link.
- 3.

Why can't I see any data in my knowledge reporting dashboard?

Sometimes latest data doesn't appear in knowledge reporting dashboards. To make the missing data available in your knowledge reporting dashboards, you need to schedule and run the following knowledge processes:

Schedule Process Name	Description	Impacted Dashboards	Recommended Frequency
Knowledge Article View Aggregation	Use this scheduled process to aggregate data on the number of articles that have been viewed.	Knowledge Management Views	Hourly
Knowledge Search Aggregation	Use this scheduled process to aggregate data on the number of knowledge base searches that users have performed.	Knowledge Question Analysis	Hourly
Knowledge Workflow Aggregation	Use this scheduled process to aggregate data on the use of workflow, such as how long articles spend on each workflow step.	Article Workflow Dashboard	Hourly

Schedule Process Name	Description	Impacted Dashboards	Recommended Frequency
	Schedule this job only if you're using knowledge workflow.		

To schedule a knowledge process:

1. Go to **Tools**, and click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** as the process type.
4. In the **Name** field, type "Knowledge", and press Enter.
This displays the list of available Knowledge processes.
5. Select the process you want to schedule and click **OK**. You need to repeat the steps for each of the following processes:
 - o Knowledge Article View Aggregation
 - o Knowledge Search Aggregation
 - o Knowledge Workflow Aggregation
6. Click **OK** in the Schedule New Process dialog box to go to the Process Details page for the job.
7. Click **Process Options**, choose the options you want, and click **OK** to return to the Process Details page.
8. Click **Advanced** and for **Run** select **Using a schedule**.
 - o For the Knowledge Article View Aggregation, set the following:
 - **Frequency:** Hourly/Minute
 - **Time Between Runs:** Hours 1 Minutes 0
 - **Start Date**
 - **End Date**
 - o For the Knowledge Search Aggregation, set the following:
 - **Frequency:** Hourly/Minute
 - **Time Between Runs:** Hours 1 Minutes 0
 - **Start Date**
 - **End Date**
 - o For the Knowledge Workflow Aggregation, set the following:
 - **Frequency:** Hourly/Minute
 - **Time Between Runs:** Hours 1 Minutes 0
 - **Start Date**
 - **End Date**
9. Click **Submit**.

Why are there random breaks in auto-generated SR number sequences?

At times you might notice random breaks in the auto-generated SR number sequence. For instance, SR numbers has jumped from 3012 directly to 4010, with no SR numbers between.

The SR sequence is maintained by the database sequence. The database sequence uses cache space to reserve the values for sequential numbers. The default size for the cache is 1000 for best performance. So the first 1000 numbers

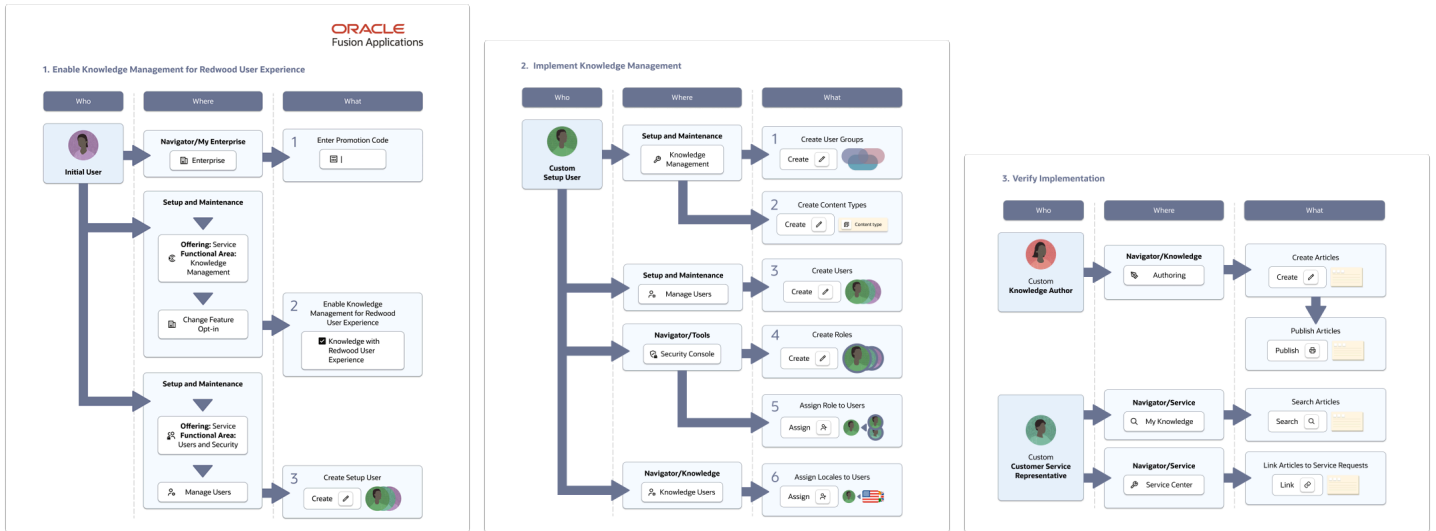
are booked for the sequence when the database starts and all new SRs are assigned with sequential numbering, such as 1 to 1000. When the database refresh happens, the cache is cleared and the next 1000 numbers are reserved. So, if the previous 1000 number allocation hasn't been completely used, say it stopped at number 987, after the refresh, the SR numbers will nonetheless begin at number 1001.

How do I set up Fusion Knowledge Management in the Redwood User Experience?

You can use the following high-level steps to implement Fusion Knowledge Management in Redwood User Experience.

- Enable Knowledge Management in Redwood User Experience
 - Get your Cloud Account Details from the Welcome Email
 - Enter the Promotion Code
 - Enable Knowledge with Redwood User Interface Feature
 - Create a Setup User
- Implement Knowledge Management
 - Create User Groups
 - Create Additional Custom Content Types
 - Create a Knowledge Author User
 - Create a Customer Service Representative
 - Assign Locales to Users
 - Schedule Required Knowledge Processes
- Verify implementation
 - Verify Your Knowledge Implementation Setup as an Author
 - Verify your Knowledge Implementation Setup as a Customer Service Representative

This flowchart illustrates these implementation steps and provides information on the related roles and UIs.



For more information on setting up Knowledge Management, refer to the *How do I get started with Fusion Knowledge Management in the Redwood User Experience?* playbook.

How do I update multiple service request records at the same time?

You can select more than one record from the service request list page and update them at the same time. For example, you might want to change the owner of multiple records or update the severity field value on all selected service request records at once. You can also select more than one record and perform the same action at the same time. For example, you can select more than one record and select the Delete action which will delete those selected records. The Delete action will only appear for those users who have the System Administration privilege.

How can I embed a video in a knowledge article?

As an author, you can embed videos in an article in Knowledge Authoring.

To embed a video in Fusion Service Knowledge Management with Redwood User Experience:

1. Navigate to **Knowledge > Authoring**.
2. Search and click the article you want to edit.
3. Click **Edit**.
4. Copy and paste the URL of the video in the rich text area where you want to embed the video.
You can see the video embedded in the article.
5. Click **Save**.

To embed a video in Fusion Service Knowledge Management with Classic User Experience:

1. Navigate to **Knowledge > Authoring Classic**.
2. Search and click the article you want to edit.

3. From the **Action** menu, click **Edit**.
4. Click in the rich text area where you want to embed the video, and click the "Enable source editing" icon.
5. Copy the code for the video. For example, to get the code for embedding a YouTube video:
 - a. Open the video in YouTube.
 - b. Click **Share**.
 - c. Click **Embed**.
 - d. Copy the iframe code.
6. Paste the code for the video in the rich text area where you want to embed the video.
7. Click **Save**.

Why can't I add attachments to a knowledge article as an author?

If you don't see the option to attach files to an article in Knowledge Authoring, you need to request your administrator to enable file attachments for the content type of the article.

To enable file attachments:

1. Log in as an administrator.
2. Select **Setup and Maintenance**.
3. From the **Setup** menu, select the **Service** offering.
4. Select the **Knowledge Management** functional area and click **Manage Knowledge Content Types**.
5. Click the name of the content type you want to be able to attach files to.
6. Click **Content Schema**.
7. Select the **Enable File Attachments** check box to allow authors to attach files to articles of this content type.
8. Click **Save**.

Why can't I find users in the Knowledge Users UI?

If you are unable to search for a user in the Knowledge Users UI, ensure that you have:

- Created the user with the required Knowledge role. For more information, see *What are the predefined knowledge roles?*
- Added the Resource role to the knowledge user.

For an example on how to create a knowledge user, refer to the *Create a Knowledge Author User* topic in the "How do I get started with Fusion Knowledge Management in the Redwood User Experience?" playbook.

What's the maximum attachment size?

The profile option FND_FILE_UPLOAD_MAX_SIZE defines the maximum attachment size for Fusion Service.

By default the profile option is set to 2 GB at site level. We recommend, in the interest of performance, that you upload smaller attachments.

What are scheduled processes?

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends.

Some scheduled processes give you printable output. Those processes might have **Report** in their name.

Use the Scheduled Processes work area to run all the processes you've access to and to manage submissions. If you need access to this work area, ask your security administrator to assign you a role that gives you access, for example a custom role with the the Manage Scheduled Processes (FND_MANAGE_SCHEDULED_PROCESSES_PRIV) privilege. Other than the Scheduled Processes work area, you might be also able to run certain processes from other work areas.

Jobs and Job Definitions

Each scheduled process that you run is based on a job. The job is the executable that controls what the process does. Each job needs a job definition, which, for example, identifies the parameters and other options you've set for the process. You or your administrator can create job definitions for Oracle Analytics Publisher reports so that users can run the reports as scheduled processes.

Process Sets

A process set is a scheduled process that contains multiple processes or even other process sets. So, when you submit a process set, you're running more than process.

Note: When you submit certain scheduled processes, the job logic causes other processes to automatically run. But in this case, you're not submitting a process set that includes those other processes.

Submission

When you submit a scheduled process, you can use its parameters to control how, and which records are processed. For example, a process includes only the transactions that were edited by the person you select for a Last Updated By parameter. Some scheduled processes don't have parameters.

As part of the submission, you can also set up a schedule for the process, for example to run once a week for two months. Every time a process runs, there's a unique process ID.

Output

Some scheduled processes provide output in PDF, HTML, and other formats. For example, a process can import records and also produce output with details about those records. There are many types of output, for example a tax document or a list of transactions.

How do I define a catalog for Service?

In most implementations, you must create a catalog of products and services. If you've already defined a catalog with the Base usage for Sales, it can be used in the Service offering.

You also have the option to create and manage a distinct catalog for the Service offering.

Before deciding whether to create a distinct catalog for the Service offering, consider that using the same catalog as Sales means you've the same hierarchy of product groups used to categorize service requests. For some implementations, you can use the same catalogs. However, in other implementations, the Sales catalog might not have the correct granularity to categorize service issues. In these situations it would be appropriate to create a separate hierarchy of product groups and products, specifically for the Service offering.

Using an Existing Sales Catalog for the Service Offering

To use the same catalog for your Service offering that you use for your Sales implementation, you must add the root product group for the Sales catalog in the Service offering.

To use an existing Sales catalog in your Service offering:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Service Catalog
 - o Task: Manage Product Group Usage

The Manage Product Group Usage page appears.

2. Click the **Service** usage.
3. In the **Service: Details** section, on the **Product Groups** tab, add the root product group for the sales catalog.
4. Save the record.

Defining a Distinct Catalog for the Service Offering

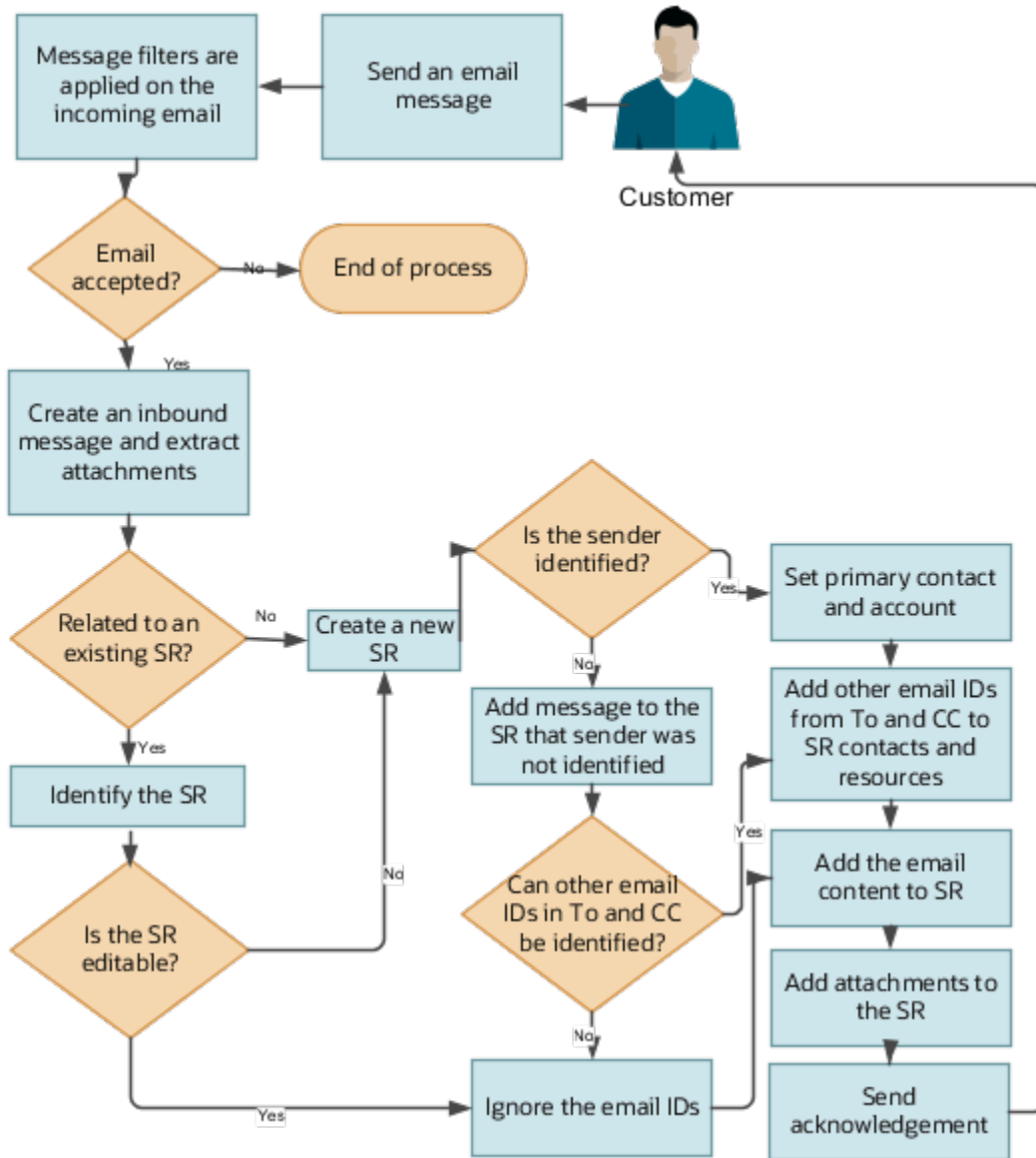
Defining a catalog for the Service offering is the same procedure that you use for Sales. The only difference is that for Product Group Usage, Sales uses the Base usage, whereas Service uses the Service usage.

To define a distinct catalog for the Service offering:

1. Define a product catalog specific to Service.
2. In the **Manage Product Group Usage** page, click the **Service** usage.
3. Associate the product catalog that you created to the Service usage, as described in the previous section.

How are inbound messages processed?

An inbound message is created when you receive an incoming service email from a customer or a partner. This flowchart describes the process flow for an incoming customer email:



1. A customer or a partner sends an email requesting support.
2. If an inbound message filter exists, then the filter is applied to the incoming message.
3. If the message is accepted, then an inbound message is created, and any associated attachments are extracted.
4. The message is verified to see if it's related to an existing Service Request (SR).
 - o If the inbound message is related to an existing SR:
The related SR is identified. If the related SR can be edited, then the email content and attachments are added to the SR. If the original SR can't be edited, then a new SR is created.
 - o If the inbound message isn't related to an existing SR, then a new SR is created.
5. The email ID of the sender is validated against the customer or partner records in the database.
 - o If the email ID of the sender exists in the records, then the primary contact and the account are updated on the SR.
 - o If the From email ID doesn't exist in the database, then a message is added to the SR that the sender can't be identified.

- o If more than one contact with the same email ID exists in the database, then the following scenarios are possible:

Scenario	Primary Contact in the SR	Acknowledgment Sent
Sender's email address matches the email address of 1 contact, 1 partner, and 1 resource.	The matching contact is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.
Sender's email address matches the email address of 2 contacts.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 2 contacts and 1 partner.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 1 partner and 1 resource.	The matching partner is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.
Sender's email address matches the email address of 2 partners and 1 resource.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 1 resource.	The matching resource is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.

6. All other email IDs in the **To** and **CC** fields in the message are checked to see whether they exist as resources or contacts in the application.
 - o If they exist as contacts, they're added to the SR contacts.
 - o If they exist as resources, they're added to the SR team.

Note: If the other email IDs don't match any resource or contact in the application, then those IDs aren't added to the SR. But they're displayed in the SR message.

7. If the primary contact set in the SR is associated with only one account, then that account is associated with the SR. If the primary contact is associated with more than one account, then the primary account of the primary contact is set as the account on the SR.
8. The incoming message content and the attachments are added to the new SR.

How do I export and import assignment objects and rules setup data?

You can understand how to export and import assignment objects and rules setup data, along with the points to consider while moving the setup data in this topic.

Most application implementations require moving functional setup data from one instance into another at various points in the life cycle of the applications. For example, in an enterprise application implementation, a development or test instance is first deployed before deploying a production instance. You can move functional setup configurations for assignment objects or assignment rules from one application instance into another by exporting and importing configuration packages from the Manage Configuration Packages page.

To export and import assignment setup data, start by defining an implementation project for the required assignment setup task. The following are some examples of assignment tasks:

- Manage Customer Center Assignment Objects
- Manage Service Assignment Manager Objects

The Manage Configuration Packages setup task exports the assignment objects or rules setup data.

A configuration package contains the setup import and export definition. The setup import and export definition is a list of setup tasks and their associated business objects that identifies the setup data for export and the data itself. You generate the setup export and import definition by selecting an implementation project and by creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project decides the export and import sequence.

You can export a configuration package once you create it, or at any time in the future. During export, appropriate setup data is identified based on the setup export definition, and is added to the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Therefore, publish the assignment objects and rules before exporting them.

After the export completes, you can download the configuration package as a compressed archive of multiple XML files, move it to the target application instance, and upload and import it. Review and publish the assignment objects and rules setup data in the target application instance to make them available for assignment processing.

What's Computer Telephony Integration (CTI)?

Computer telephony integration (CTI) enables integration of third party media toolbars with Fusion Sales and Fusion Service. You can display a media toolbar by enabling the Partner CTI Service, and by giving your signed-in users the Access Partner Media Toolbar privilege which allows access to the toolbar.

Use CTI to:

- Make an outbound call using Click to Dial and skip manual dialing.
- Receive phone calls.

Integrating with CTI gives you the following features:

- Notifications of incoming calls and ability to accept or reject the call
- Automatic caller identification
- Ability to search for a contact
- Optional caller verification
- Display of administrator-defined screen pop with caller or service details
- Automatic interaction recording
- Optional call wrap up

You can build this integration using the provided MCA Media Toolbar APIs or you can engage with one of Oracle's telephony partners. To connect with telephony partners, go to [Oracle Cloud Marketplace](#) and search for any one of the following:

- OpenMethods PopFlow
- OpenMethods Harmony (choose Harmony for B2B Service)
- Five9 (Cloud Contact Center for Oracle B2B Service)

How do I configure screen pop pages?

You can configure screen pop pages to display pages of information that can aid an agent to start a customer interaction efficiently. For example, you can configure a screen pop page to display information about an open ticket logged by the call-in customer.

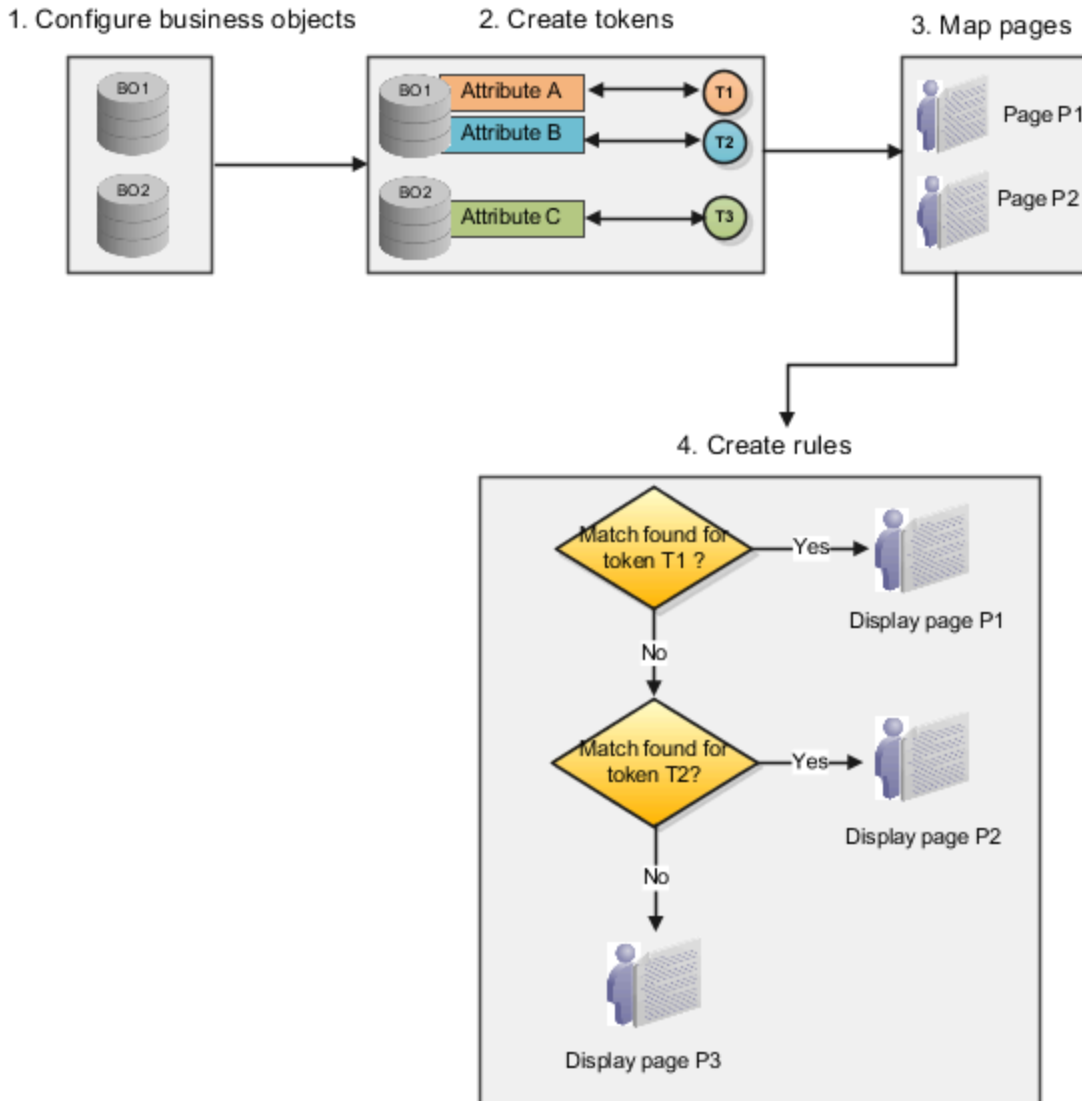
You can create screen pop pages for ready-to-use standard business objects or for user-defined objects. To create screen pop for user-defined objects, you must first create the objects, define the fields, pages, and other elements using Application Composer.

You configure screen pop pages in Setup and Maintenance using the following steps:

1. **Configure business objects.** These business objects are associated with standard or user-defined objects. Standard objects include ready-to-use objects, such as Service Requests or Queues, and the user-defined objects are created by the user.

- 2. **Create tokens.** Tokens are associated with the attributes of a business object. For example, you can create a token called *SVC_INVOICE_DATE* and associate it with the *Invoice_Date* field of the *Invoices* business object.
- 3. **Map pages.** Mapping associates a screen pop page with the pages of the underlying standard or user-defined object.
- 4. **Create rules.** Rules identify the page that's displayed when passing a token. Rules are defined in order of priority. For example, create rules that, if a service request number is available, display the service request page. If no service request number is available, but there's a contact identified, display the **Edit Contact** page. If no service request or contact information is available, display the **Create Contact** page.

The following figure illustrates the process of configuring screen pop pages:



How do I manage SmartText entries?

A SmartText entry is a reusable fragment of text that you or your users can create and use in service request messages. You can also create SmartText messages to use in chat.

As an administrator, you can create public SmartText entries that all users can use. Users can't edit these entries.

You can create SmartTexts in multiple languages. You can use rich-text to create SmartText entries in service request message fields by enabling HTML. Other service request fields, such as Problem Description, Solution Description and Transfer Service Request only support plain text. You can also create SmartText entries for chat.

You can create SmartText entries for a specific business unit if you've the HZ_ENABLE_MULTIPLE_BU_CRM profile option enabled (set to Y). With this profile option enabled, the Business Unit drop-down list is displayed in the Manage SmartText UI so you can assign a BU at the time you create a new SmartText. For more information, see Manage Common CRM BU Profile Options for Service BUs.

You can define where to save the SmartText entry, insert variables in the entry, and choose to share the SmartText entry by using the following availability options:

- **Always:** Select this option to make the SmartText entry available to users at all times.
- **Interval:** Select this option and define the period during which this entry is available to users.
- **Disabled:** Select this option to disable the SmartText entry and display it in the public folders for the users.

Required Privileges

The following table shows the different privileges you grant to allow your users SmartText access.

Privilege	Code	Description
Use SmartText	SVC_USE_STD_TXT_PRIV	Allows a user to view, search and insert SmartText.
Manage SmartText	SVC_MANAGE_STD_TXT_PRIV	Allows a user to create, update, and delete SmartText for their own use.
Publish SmartText	SVC_PUBLISH_STD_TXT_PRIV	Allows a user to set the scope of SmartText to GLOBAL which allows any user with the correct privilege to view and use that entry.
Administer SmartText	SVC_ADMIN_STD_TXT_PRIV	Allows the user to administer SmartText.

Require Agents to Provide User Entered Values when Inserting SmartText

You can enable your application to require agents to enter values for user variable prompts when they select a SmartText. This ensures that all requested data is captured.

Here's the profile option you need to set to activate the functionality:

1. In the Setup and Maintenance work area, go to the following:

- Offering: Service
 - Functional Area: Productivity Tools
 - Task: Manage Global Search Profile Options
2. Search for the profile option code `ORA_SVC_SMARTTEXT_MANDATORY_USER_VARIABLES`
 3. Set the site level profile value to **Yes**.
 4. Click **Save and Close**.

How do I set up inbound and outbound email?

You can configure email to use a single email channel to handle both inbound and outbound email messages. Inbound messages are the messages that you receive from your customers. Outbound messages are the messages that you send to your customers.

Note: When your customers receive an email from your company, they can reply directly to the email. They don't have to change the **To** address in the reply. The **To** address already displays the account name field of the channel that the agent uses in the outbound message.

Use the following tasks in Setup and Maintenance to set up inbound and outbound email.

No.	Task	Describes how to
1.	Enable Configuration of Email Communications	Enable the tasks required to configure inbound and outbound email communications for service requests.
2.	Configure an Email Channel	Configure an email channel for your organization.
3.	(Optional) Create and Update Inbound Message Filters	Set up email filters. Filters enable you to set one or more criteria based on which an incoming message from a customer or a partner can be accepted or rejected.
4.	Configure Profile Options for Inbound and Outbound Email	Configure inbound and outbound email profile options.
5.	(Optional) Define Email Templates	Define email templates.
6.	(Optional) Modify Acknowledgment Messages for Inbound Email	Modify the predefined acknowledgment messages provided by the application according to your company's requirement.
7.	Access Point Setup for Inbound Emails: This section consists of multiple topics.	The procedures in this section describe how to verify your email channel configurations and how to register the correct access points with the UMS.

No.	Task	Describes how to
8.	Configure a Job to Process Inbound Emails	Configure a job to process inbound emails to retrieve emails from the customer at regular intervals.

How can I automatically route work assignments to agents?

Automatic routing of work to agents is done through Omnichannel. So, if you want the work assignments for agents to be automatically routed, you must enable Omnichannel.

Note: To view the Omnichannel tasks, you must enable the **Omnichannel Routing** feature in the **Communication Channels** offering.

Here's a list of profile options you must configure to enable Omnichannel. To enable Omnichannel and its notifications, here's the list of profile options that you must configure.

Profile Option	Description
SVC_ENABLE_OMNI	Enables Omnichannel.
SVC_OMNICHANNEL_BROWSER_NOTIFICATION_ENA	Enables browser notifications about work assignments.
SVC_OMNICHANNEL_DESKTOP_NOTIFICATION_ENA	Enables desktop notifications about work assignments. When it's enabled, you can view notifications even if you aren't actively viewing the application pages.
SVC_OMNICHANNEL_NOTIF_MULTI_AGGR_THRESHOLD	Specifies the maximum number of forced notifications that can be individually stacked before the rollup of consolidated notifications occurs.
SVC_OMNICHANNEL_BROWSER_NOTIFICATION_AUTO_INT	Specifies the number of seconds that lapse before the browser notifications are automatically closed.
SVC_INTERACTION_RETENTION_DAYS	Specifies the number of days to retain interactions before they're purged from the database. Must be set to 1 or greater for the job to run.
SVC_EVENTS_RETENTION_DAYS	Specifies the number of days to retain events before they're purged from the database. Must be set to 1 or greater for the job to run.
SVC_INTERACTION_DISPLAY_DAYS	Specifies the number of days from the past because when the interactions can be viewed.

Profile Option	Description
SVC_OMNI_DISABLE_WORK_ITEM_AVAILABILITY_SELECTION	<p>Disables the option for the agents to change their work item availability on the Omnichannel toolbar:</p> <ul style="list-style-type: none"> • Chat: Disables the option for the agents to change their chat work item availability. • Non-real-time Work: Disables the option for the agents to change their non-real-time work item availability. • All: Disables the option for the agents to change any work item availability. • None (default value): Agents might change any work item availability.

To enable Omnichannel and its notifications:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Communication Channels
 - o Task: Manage Omnichannel Profile Options
2. In the **Manage Omnichannel Profile Options** window, complete the following steps for each of the listed profile options:
3. Click the profile option name.
4. Navigate to the Profile Values region of the page.
5. Set the **Profile Value** for the Site **Profile Level** as follows:
 - o For the first three profile options in the table, set the value to **Yes** to enable the profile option.
 - o For the remaining profile options in the table, specify a suitable value as described.
6. Click **Save**.

How do I configure an email channel?

To send emails to your customers and to receive emails from them, you must first set up an email channel.

You can create separate email channels for different application stripe codes. For example, one for CRM and one for HCM. However, you can use the same email channel for both inbound and outbound emails:

Note: You can add attachments totaling 10MB to an email.

- **Inbound email:** Indicates the service emails received from your customers. As part of your implementation, you must set up a forwarding rule on your company email server to redirect these emails to Oracle's inbound email ID. This is the same email account that Oracle provided at the time of provisioning. For example, all the support emails that are sent to `TechSupport@mycompanydomain.com` are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing. The `SVC_INBOUND_EMAIL_ADDRESSES` profile option indicates the Oracle email ID to which the support mails must be forwarded.

If it's required for your company, you can also create different support email channels for different business units or divisions. For example, `TechSupportDiv1@mycompanydomain.com`, `TechSupportDiv2@mycompanydomain.com`,

and so on. All the support emails sent to these different support email channels are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing.

Note: If you're implementing HR Help Desk or Internal Help Desk, then you must define a channel with the appropriate application stripe. The account name of the channel must match the email address of your mailbox from which you're redirecting or forwarding emails to the Oracle mailbox mentioned above. If you don't define the appropriate channel, the requests created for the emails are set with the CRM application stripe. In such cases, you must run an ODI import process to update the application stripes of the SRs.

The `SVC_INBOUND_EMAIL_ADDRESSES` profile option contains two email IDs:

- For CRM, use the email ID that contains the text 'extservice' as a part of the ID, as the forwarding email ID.

Note: You must avoid updating these inbound email addresses. If you need to update these inbound email addresses for some reason, you must complete the following steps:

- Update the corresponding forwarding rule.
- Ensure that you register the updated inbound email addresses as access points for inbound email. See *How do I register or unregister access points for inbound email?*

- **Outbound email:** Indicates the emails that are sent by the Service application from the service request. For example, when an agent responds to the primary customer contact.

To ensure that your outbound email is delivered successfully to your external recipients, you must set up a Sender Policy Framework (SPF) policy on your domain.

To enable Oracle to send out an email on your behalf, you must do the following:

- Set up an SPF policy on your domain as an authentication mechanism. The exact method of setting up an SPF policy varies from one domain provider to another. For example, `v=spf1 include:spf_c.oraclecloud.com ~all.`
- To set the support agent's name as the **From Name** in outbound emails, set the value for the `SVC_USE_RESOURCE_NAME_IN_OUTBOUND` profile option to **Yes**. For more information, see *How do I set the From Name in outbound emails?*

To configure an email channel for the customer:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Communication Channels
 - Task: Manage Communication Channels

2. In the **Service Channels** page, click **Create Channel**.

3. In the **Create Channel** window:

- a. Select a **Stripe Code**.

Select **CRM** to process emails from and to external customers. Select **HCM** to process emails from and to internal employees, through the HCM Help desk support.

- b. The **Purpose** field is set to **Support** by default.

- c. Select the **Channel Type** as **Email**.
- d. Specify the support email ID of your company as the **Account Name**. For example:
`support@mycompanydomain.com`

If a forwarding rule is configured, all the mails that are sent to the specified support email ID are forwarded to Oracle's inbound email ID. If an outbound email is configured, Oracle can send mails to the customer as the specified support email ID, on your behalf.

- e. Verify whether the generated **Channel Code** is unique.

The channel code is autogenerated and it uniquely identifies a communication channel when exporting or importing channels from one environment to another.

- If the auto-generated channel code is unique, you can leave it unchanged.
- If the auto-generated channel code isn't unique, add a set of characters to the code to make it unique.

- f. (Optional) Specify a **Display Name** to indicate any information about the channel, such as the name of the deploying company for which the channel is being configured.
- g. When a new channel is being created, it's active by default. To deactivate it, clear the **Active** option.
- h. (Optional) From the **Business Unit** drop-down list, select a Business Unit (BU).

The BU set in the scope is selected by default, but you can select a different BU. This column appears only if the multiple business units feature is turned on.

- i. Click **Save**.

How do I configure a job to process inbound emails?

You can configure a new job to retrieve emails at regular intervals, based on the specified frequency.

Note: Inbound email is an asynchronous channel. When you have a high volume of emails, the emails are queued up and processed. Inbound email processing can take anywhere from 10 minutes up to 1 hour from the time the user sends an email depending on your inbound email volume and the frequency at which you've scheduled ESS job to process inbound emails.

To configure a job to process inbound emails:

1. From the Navigator menu, select the **Scheduled Processes** option.
2. In the **Scheduled Processes** screen, click **Schedule New Process**.
3. In the **Schedule New Process** dialog box, select **Job** as the **Type**.
4. Search for and select the **Retrieve Inbound E-mail Messages** option from the **Name** drop-down list.
5. Click **OK**.
6. In the **Process Details** dialog box, click **Advanced**.
7. In the **Schedule** tab, in the **Run** options, select the **Using a schedule** option.

8. Select Frequency and specify a Start Date.

Note: You must ensure that you always select a frequency, whether you're using your test or your production environment. You can select a higher frequency if required. If you run a job manually without setting a frequency, the process might not retrieve all the emails. When you schedule the job to run periodically, it pulls all the emails from all the servers. After scheduling the ESS job your application may take few iterations of the job to refresh the caches that are required for the successful execution of inbound email processing. As a result, email processing might be delayed until the required caches are fully refreshed.

9. Click Submit.

A job is scheduled to process inbound emails.

Note: Inbound emails work properly only for SRs whose reference numbers have the following characters: [A-Z], [a-z], [0-9], and the special characters hyphen (-), colon (:), period (.), comma (,), or underscore (_). So you can use only one of these characters as the prefix for an SR reference number. You can't use any other special character in the prefix apart from the ones mentioned.

How do I configure profile options for inbound and outbound email?

You can set options for incoming and outgoing emails by configuring email profile options. For example: In the SVC_OUTBOUND_EMAIL_FROM profile option, you can set the From email ID that you use to respond to a customer's email.

Configure the inbound email profile options as specified in the following table.

Inbound Profile Options	Description
SVC_ENABLE_INBOUND_EMAIL_DEFAULT_PROCESSING	Indicates whether inbound emails from customers must be processed automatically by creating or updating an SR. If this option is disabled, only the inbound message object is created, without creating an SR.
SVC_INBOUND_EMAIL_ADDRESSES	Indicates the inbound email IDs that are monitored by the Service application. The email IDs are separated by a comma and are automatically populated during provisioning. You must use the address to set a forwarding rule. Try to avoid updating these inbound email addresses. If you update these inbound email addresses for some reason, you must complete the following steps: <ul style="list-style-type: none"> • Update the corresponding forwarding rule. • Ensure that you register the updated inbound email addresses as access points for inbound email.
SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS	Enables the display of images inline within the SR messages in the UI. The default value is Yes.
SVC_INBOUND_EMAIL_MAX_ATTACH_SIZE	Indicates the maximum size in MB of attachments that are allowed in an inbound email.

Inbound Profile Options	Description
	<p>The default value is 10 MB.</p> <p>Here are some key points to note:</p> <ul style="list-style-type: none"> The recommended maximum limit for the email size is 15 MB. Email size includes email headers, attachments, and the email content. <p>Note: You can increase the size of the attachments past 15 MB, but this isn't recommended as it might cause server issues</p> <ul style="list-style-type: none"> If an email contains non text content or attachments, that gets base64 encoded, and this can increase the overall size of the email. So when your users send emails that exceed a total size of 15 MB, such emails aren't processed by the server.
SVC_INBOUND_MESSAGE_BATCH_SIZE	<p>Indicates the number of emails that can be processed at a given time. This is the maximum number of emails retrieved by every run of the Retrieve Inbound Email Messages scheduled process.</p> <p>The default value is 10.</p>
SVC_EMAIL_PROCESS_UNKNOWN_CUST	<p>Indicates whether an SR must be created for emails sent by unknown customers.</p>
SVC_ENABLE_INBOUND_EMAIL_ACKNOWLEDGEMENT	<p>Indicates whether an acknowledgment must be sent for an incoming email.</p> <p>If you prefer not to have emails sent when SRs are created, disable this profile option.</p> <p>To disable it, use the Manage Administrator Profile Values task in Setup and Maintenance. Search for the SVC_ENABLE_INBOUND_EMAIL_ACKNOWLEDGEMENT profile option, and then set the profile value to No.</p>
SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER	<p>Specifies the maximum number of emails to be sent to one user within a specific time interval. This time interval is specified in the SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL profile option.</p> <p>The default value is 3.</p> <p>Note: Let's say you don't want to use this feature, and you want to send an acknowledgment email for every email received from a user. In that case, you can set this profile option to a high value such as 100. It's a good idea to simultaneously set the SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL profile option to a low value such as 5 minutes.</p> <p>This profile option also helps to prevent the creation of infinite email loops.</p>
SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL	<p>Specifies the time interval for which the limit check is applied for the maximum number of emails to be sent to a user.</p> <p>This means that only the maximum number of emails specified in the SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER profile option can be sent to one user in this time interval.</p> <p>The default value is 60 minutes.</p>

Inbound Profile Options	Description
	<p>Note: Let's say you don't want to use this feature, and you want to send an acknowledgment email for every email received from a user. In that case, you can set this profile option to a low value such as 5 minutes. It's a good idea to simultaneously set the SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER profile option to a high value such as 100.</p> <p>This profile option also helps to prevent the creation of infinite email loops.</p>
SVC_INBOUND_EMAIL_PATTERN_TO_STOP_ACK	Specifies the email patterns that must be blocked, so that the application stops sending acknowledgment emails to email addresses having those patterns. The default email pattern is <code>postmaster@*.oraclecloud.com</code> .
ORA_SVC_ENABLE_FAILED_INBOUND_MESSAGE_PROCESSING	<p>Enables the automatic processing of inbound messages that weren't processed earlier because of internal issues.</p> <p>The default value is Yes.</p> <p>To stop the retrieval of unprocessed messages at any time, you can set the value to No.</p>
ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE	<p>Enables the agents to see the images or attachments from the first email received on an SR in both the SR header and the SR message.</p> <p>The default value is No.</p>
ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY	<p>Enables viewing of images and logos inline within the body of the SR message, but the inline images aren't captured as regular SR attachments. The default value is No.</p> <p>When it's set to Yes:</p> <ul style="list-style-type: none"> Documents received as attachments to inbound emails are included in the SR attachments. Images such as logos in the sender's signature and inline images aren't included in the SR attachments. <p>Note: When you set this value to Yes, the ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE profile option is automatically set to Yes.</p>
ORA_SVC_INBOUND_MSG_LAST_REPROCESSING_DAYS	<p>Specifies the number of days before the current date when the failed inbound messages are to be reprocessed.</p> <p>The default value is 1.</p>
ORA_SVC_ENABLE_INBOUND_PARTIAL_STATUSES_FOR_REPROCESSING	<p>Enables the reprocessing of unprocessed inbound emails from the past.</p> <p>The default value is No.</p> <p>When it's enabled, reprocessing starts from the last point where the processing stopped earlier.</p>
ORA_SVC_ADD_EMAIL_RECIPIENTS_TO_SR	Enables you to choose whether to add the sender and recipients of inbound emails as an SR contact or SR team member. For a new SR, the recipients in the To or Cc lists are added as SR contacts or SR team members, if their email IDs exist as valid party records in the application. For a reply email to

Inbound Profile Options	Description
	<p>an existing SR, the sender and the contacts or team members in the To or Cc lists are added as SR contacts or SR team members if they don't already exist in the SR.</p> <p>The default value is Yes.</p> <p>When you set the value to No, the sender and recipients of inbound emails aren't added to the SR.</p> <p>Note: The sender of the first email is always added as the primary contact on the SR, irrespective of the value of this profile option.</p>
ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT	<p>Specifies whether to make the Unregister button available. The default value is No. When it's set to the default value, the Unregister button isn't available. This setting helps to prevent unregistering of access points accidentally.</p> <p>Only when you specifically need to unregister an access point, you can change the value to Yes so that the Unregister button is available. After unregistering the access point, you can set the value of this profile option back to No.</p>
ORA_SVC_INBOUND_REPROCESSING_OFFSET_IN_MINUTES	<p>Used to reprocess inbound emails when it fails to create customer message on the SR. The default value of this profile option is set to 120 (2 hours). After this duration, the reprocessing logic will try to create customer message again on the SR.</p>
SVC_INBOUND_EMAIL_REGEX_TO_EXTRACT_SR_NUMBER	<p>Used to create and send a new message for an existing SR.</p> <p>Note: If the default value can't extract the SR number from the inbound email body, then try adding an extra # to the default value.</p>
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_BATCH_SIZE	<p>Specify the maximum number of inbound messages to read from Microsoft Exchange online in one ESS Job iteration.</p> <p>The default value is 10</p> <p>The maximum value is: 200</p>
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_FETCH_SIZE_PER_BATCH	<p>Specify the maximum number of inbound messages to be processed from Microsoft Exchange online in one subset of a batch.</p> <p>The default value is 10</p> <p>The maximum value is: 20</p>
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_DELETE_SIZE	<p>Specify the maximum number of inbound messages to be deleted from Microsoft Exchange online in one subset of a batch.</p> <p>The default value is 10</p> <p>The maximum value is: 20</p>

Configure the outbound profile options for Service as specified in the following table.

Outbound Profile Options	Description
SVC_OUTBOUND_EMAIL_FROM	<p>Indicates the From email that's used for sending outbound emails to customers. The default value is noreply@oracle.com. You must set the value to the no reply address for your company to prevent auto-replies from creating unintended SRs.</p>

Outbound Profile Options	Description
	<p>This profile option can have the no reply email address with or without the display name. Example without display name: <code>noreply@mycompanydomain.com</code>. Example with display name: Acme Support <code><noreply@mycompanydomain.com></code>. If the profile option value doesn't contain a display name, the display name of the email channel is used in the From address.</p> <p>Let's say you set the value of this profile option as your support email ID such as <code>support@mycompanydomain.com</code>. If your From email address isn't displayed in your email received by your customer, then you'd receive a verification email at <code>support@mycompanydomain.com</code>. You must follow the instructions in that email to verify the account. If you don't have access to the inbox for <code>support@mycompanydomain.com</code>, then you must do one of the following:</p> <ul style="list-style-type: none"> • Contact Oracle support to get your email account verified. • Set the value of this profile option to another valid email address that you can access. Now when you send your first email to a customer, you receive a verification email. You must click the confirmation link in the email to complete the verification.
SVC_SR_FORWARD_TEMPLATE_NAME	Indicates the email template name for SR messages of type Forward.
SVC_SR_RESPONSE_TEMPLATE_NAME	Indicates the email template name for SR messages of type Response.
SVC_SR_SYSTEM_RESPONSE_TEMPLATE_NAME	Indicates the template name for SR messages of type System Response.
ORA_SVC_SR_EMAIL_ATT_SIZE	<p>Indicates the maximum permitted total size in MB of all the attachments in an outbound email that's sent from the Service application. Oracle recommends keeping this value less than or equal to 10 MB.</p> <p>The default value is 10 MB.</p> <p>Here are some key points to note:</p> <ul style="list-style-type: none"> • The maximum limit for the email size is 15 MB. Emails greater than 15 MB in size aren't processed by the email server. Email size includes email headers, attachments, and the email content. If an email contains non text content or attachments, that gets base64 encoded, and this can increase the overall size of the email. • Use this profile option to restrict the email attachment size such that the total email size doesn't exceed 15 MB.
SVC_ENABLE_ACKNOWLEDGMENT_TO_ALL	Indicates whether an acknowledgment must be sent to users both in the To and Cc lists for every inbound email that's received.
SVC_ENABLE_DEEPLINKS_IN_OUTBOUND_EMAIL	Indicates whether the deep links to KM articles are enabled in outbound emails and email previews. When the deep links are enabled, this helps to translate and populate the complete URL to view the articles.
ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND	Enables the use of the resource name as the sender name in outbound emails. The default value is No.
ORA_SVC_ENABLE_RESOURCE_EMAIL_USAGE_IN_OUTBOUND	Enables the use of the resource email as the sender email in outbound emails. The default value is No.
ORA_SVC_ENABLE_INLINE_ATTACHMENTS_IN_OUTBOUND_EMAIL	This profile option only impacts inline attachments, not regular attachments.

To configure email profile options:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Communication Channels
 - o Task: Manage Inbound Email Profile Options, or Manage Outbound Email Profile Options
2. Click the name of the profile option to be set.
3. In the **Manage Email Profile Options** page, in the **Profile Values** section, click the plus icon to add a value.
4. Click **Save**.

Note: Alternatively, you can click the **Manage Email Profile Options** task to display the Email Profile Options page. On this page, you can view the list of all inbound and outbound email profile options and set their values. You can also search for a specific profile option code using the search bar.

How do I monitor milestones?

You configure the Monitor Service Request Milestones scheduled process to monitor the service request milestone status, and set the job frequency to run the job after the specified time interval.

This process ensures that the service request and milestone status are up-to-date and sends an email notification if compliance issues or warning flags are found. The recommended frequency for running this job is 10 minutes.

How do I assign work to agents?

Work assignment refers to interactions or work items such as service requests (SRs) being assigned to queues for processing.

Work items are assigned to a queue and an agent is assigned to one or more queues. All work items in a queue are handled by the assigned agents.

A work item can be assigned to an agent manually or automatically based on whether the associated queue is automatic or manual. For more information about the types of queues, see *"How to Assign Agents to Work Items"*.

Note: In automatic queues, the priority of SRs is calculated based on severity and wait time. SRs with highest severity are assigned first. If there are multiple SRs with the same severity, those SRs that have been in the queue for the longest time are assigned first. But this rule applies only to bigger volumes of SRs and many agents and not on a small scale. For more information, see *"Order in Which SRs Are Assigned"*.

Work assignment in an automatic queue is done based on the following aspects:

- Agent capacity
- Availability of the agent
- Presence of the agent

- Severity of the work item
- Age of the work item

Note: Omnichannel must be enabled to use the settings for presence of the agent, availability of the agent, and agent capacity.

Here are the various ways an SR can be assigned to an agent:

- Manually set the **Assigned To** field in the Summary tab of the Service Request Details page.
- Click **Assign to Me** from the **Actions** menu on the Service Request Details page.
- Enable Omnichannel.

How do I set channel capacity?

Channel capacity indicates the maximum number of active interactions in a channel that can be handled by an agent. When the number of active interactions in an agent's queue reaches the specified capacity, the agent is considered to be 100 percent occupied.

Active non real-time interactions are decided by the qualifying statuses. Any interaction that's in one of the specified qualifying statuses is considered to be an active interaction.

Here are some helpful pointers for setting capacities for your agents:

- Oracle recommends not to set a high number for capacity. The number should be relatively small so that routing can balance the work to agents.
- Agent capacity for a non real-time channel such as service requests (SRs) is independent of the capacity for real-time channels such as chat. For example, let's suppose that the SR capacity is set to 30 and chat capacity is set to 2. And let's say an agent is handling 15 open SRs and 2 chats. Then that agent's considered to be 50 percent occupied for non real-time work and 100 percent occupied for real-time work.
- Let's see another example of how the workload is calculated when you've multiple types of work items such as SRs, activities, and escalations. Suppose an agent has a capacity of 5 for SRs and 2 for escalations. This doesn't mean that the agent can work on 5 SRs and 2 escalations simultaneously. It means that one SR takes up 20 percent of that agent's capacity and one escalation takes up 50 percent of capacity.

To set channel capacity:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Communication Channels
 - Task: Manage Capacities

The Manage Capacities page displays capacities for real-time and non real-time channels. To change the total channel capacity, change the default values in the **Capacity** fields for the channels.

2. To provide queue owners and customer service managers the ability to change the channel capacities for individuals by overriding the global default capacities:

In the Override Individual Capacities region, select the **Enable Channel Capacities to Be Overridden for Individuals** check box.

For more information about overriding individual channel capacity settings, see the Oracle Fusion Service Using Service Center in the Classic User Experience guide.

3. To change the capacity of a non real-time work:
 - a. In the **Work Assignments** region, change the default value in the **Capacity** field to a new value .
 - b. The status in the **Qualifying Status Values** column indicates the status of the work items that decide the capacity. For example, if the status is set to **New, In Progress**, only the work items that are in the specified status add up to the total capacity. To specify the active statuses, click the status value.
 - c. In the **Qualifying Status Values** window, select a status from the **No Effect on Workload** list and move it to the **Adds to Workload** list to qualify the status as active.
 - d. Click **Apply**.
4. To change the capacity of a real-time work, change the value in the **Capacity** field in the **Communication Channels** region.
5. In the **Qualifying Status Value** window, add a new status to **Adds to Workload** list and click **Apply**.
6. Click **Save and Close**.

Note: When you export or import the functional setup data for the Service offering by using the export and import feature in Functional Setup Manager, the Manage Capacities setup is also exported or imported. But the value of the **Override Individual Capacity** check box isn't exported or imported. You must select or deselect the check box manually.

What are the Media Toolbar APIs?

Use the media toolbar APIs with all toolbars that handle communication between agents and customers. The toolbar loads the APIs which are implemented in a JavaScript file format.

Note: Although media toolbar APIs are generic to all media channels, the 11.13.0.0 release supports only Phone and integration with CTI partner systems.

API Classification

The media toolbar APIs facilitate the initial configuration of the loaded toolbar. Use them to set up functionality for both the partner toolbar and ServiceCenter. There are three main flows of the toolbar interaction:

- Initial configuration of the partner toolbar and communication with Service Center.
- Inbound communication handling.
- Outbound communication handling.

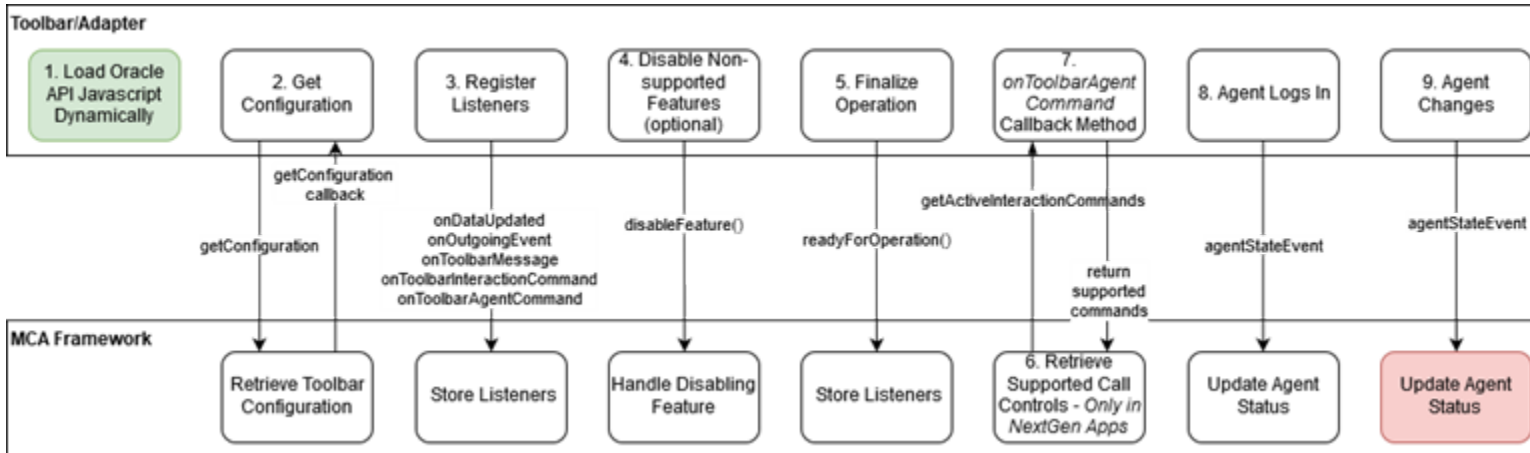
The APIs are independent of communication channels, but use channel information as a parameter, passing it to Service Center to identify whether a toolbar supports multiple channels. You define and configure the channels using Functional Setup Manager. The APIs support both preconfigured and user-defined channels.

Data Flow Methods

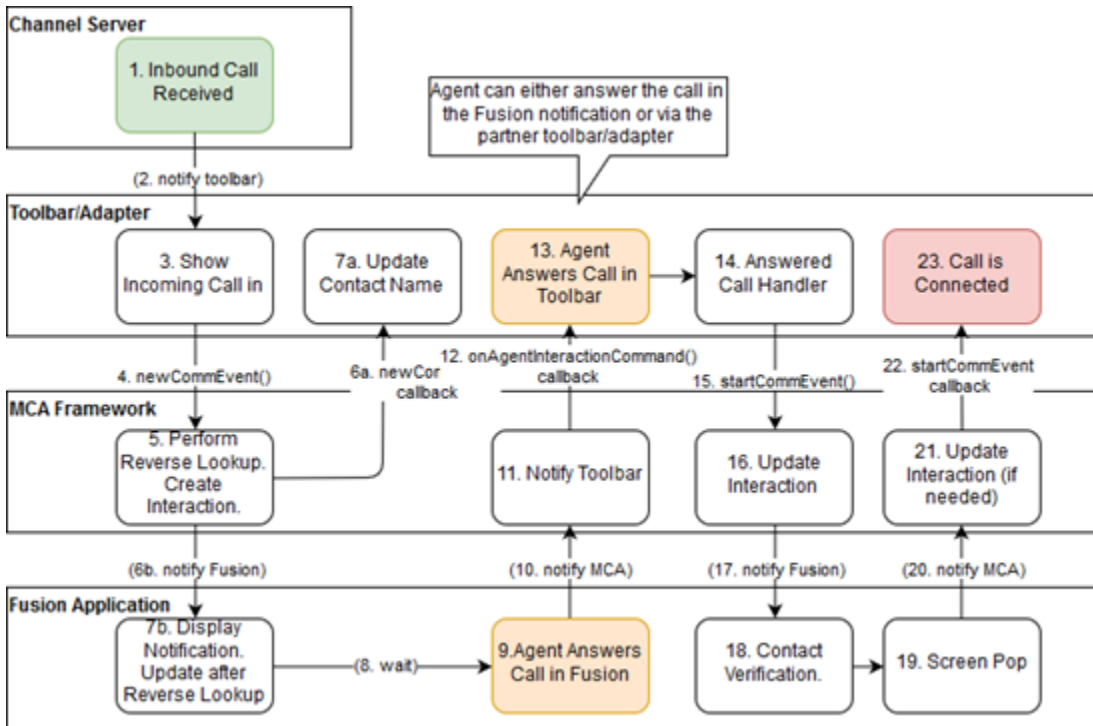
The following figures show the flow of the methods that are called by the toolbar. The method calls can be required or optional. If a call is required, the toolbar implementation must make one call for each communication event, unless you

specify otherwise. If a call is optional, the toolbar implementation can make a call whenever necessary, depending on the action needs.

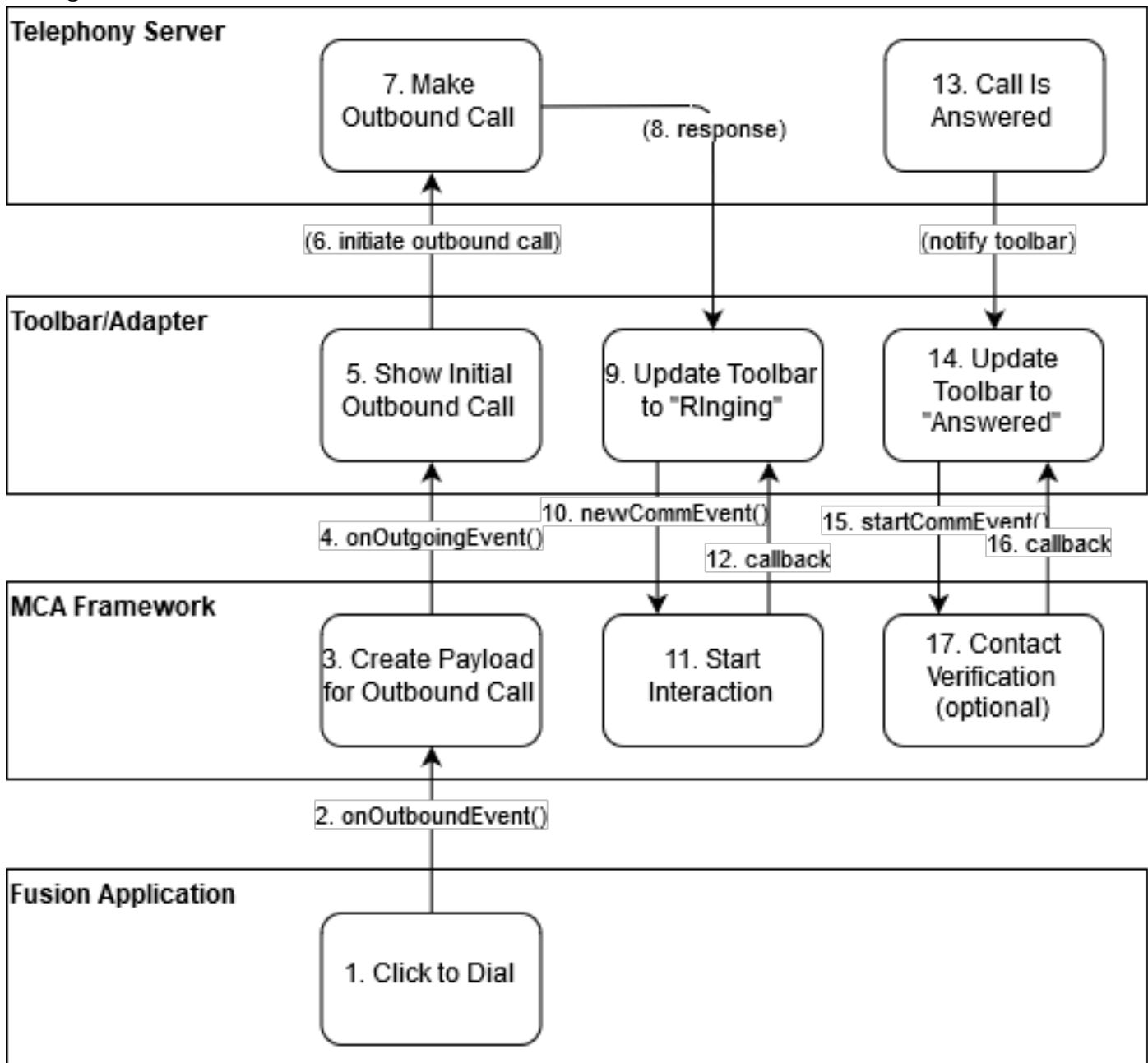
The following figure shows the configuration workflow.



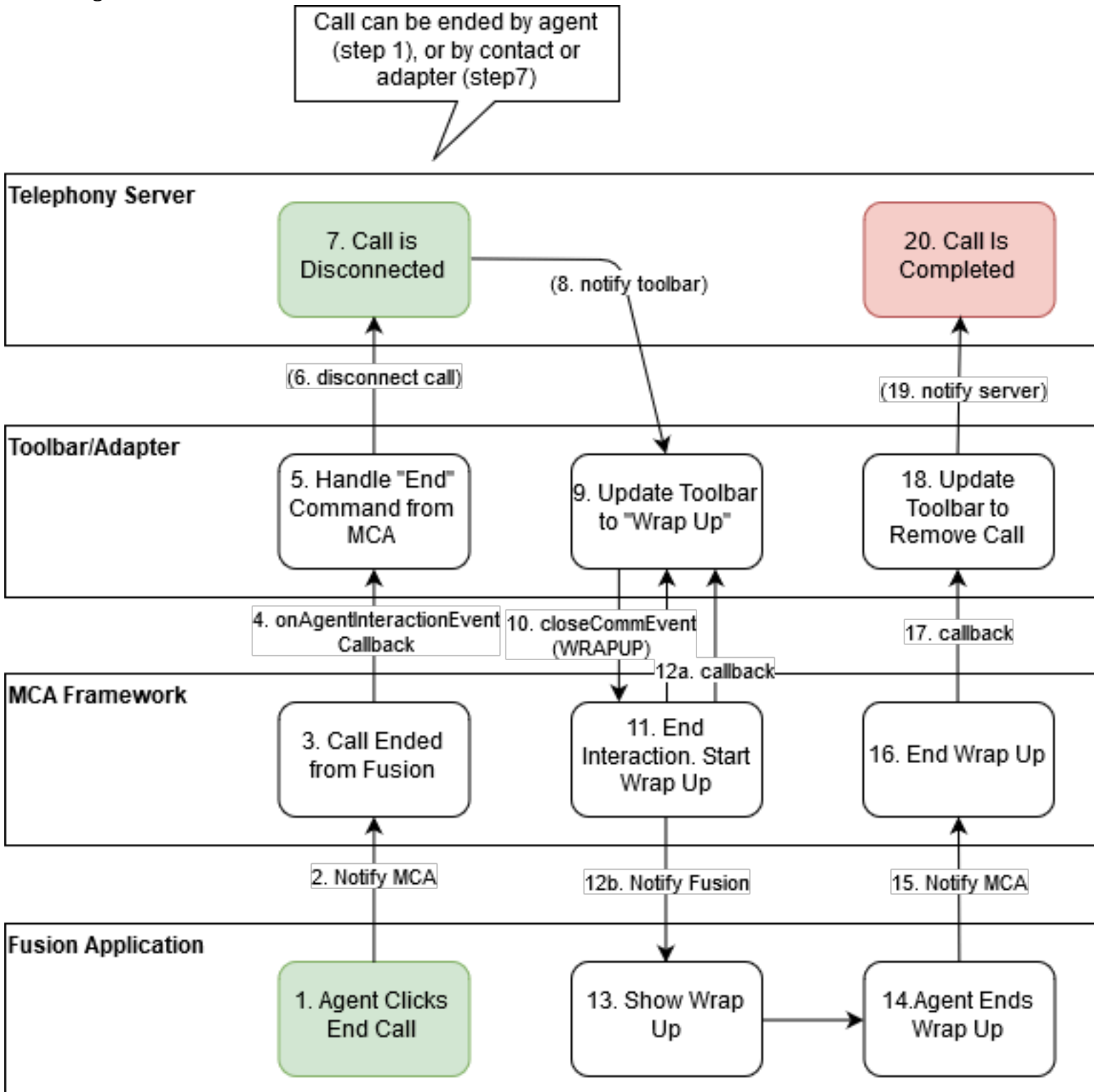
This figure shows the inbound call workflow.



This figure shows the outbound call workflow.



And this figure shows the end of call workflow.



How do I access Knowledge in Service Requests?

You must set up Knowledge such that agents can access and view knowledge articles in service requests (SRs). When you enable Knowledge, agents can see recommended articles based on contextual information in the SR, access and update their favorite articles, and search for knowledge articles.

Note: This answer is applicable to Fusion Service Knowledge Management with the Classic User Experience.

Note: You must have the Sales Administrator or Service Administrator role to enable this feature. The UI limits Knowledge search results in SRs to 30 articles.

To enable Knowledge in Service Requests:

1. Click Setup and Maintenance in the springboard menu.
2. Select the Service offering.
3. Select the Service Request functional area.
4. Click Manage Service Request Knowledge Profile Options.
5. Set the SVC_ENABLE_KNOWLEDGE_IN_SR profile value to **Yes**.

Why can't I create articles in Knowledge Authoring?

Authors can create and manage articles only in the locales assigned to them. Authors will be unable to create articles if they aren't assigned a locale. You must assign at least one locale to every author so that they can work in Knowledge.

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

To assign locales to a knowledge author user:

1. From the springboard, select **Knowledge > Knowledge Users**.
2. Search and select the knowledge author user.
3. Select the locales that you want to add and click the arrow icons to move the locales from **Available Locales** to **Selected Locales**.
4. You can select multiple locales in a single operation, or select all of the locales using the double arrow.
5. Click **Save**.

How do I use keyboard shortcuts

Administrators can edit keyboard shortcuts for users to manage service requests. You can define keyboard shortcuts in Setup and Maintenance for the following:

- **Button Access Keys** which are buttons and links on service request pages. For example, **Submit, Done, Apply, Response, Save and Close**, and so on. The following table lists button access key combinations for the latest versions of supported browsers.

Browser	Operating System	Key Combination	Action
Google Chrome	Linux	Alt+Shift+Key	Click
Google Chrome	Mac OS X	Control+Option+Key	Click
Google Chrome	Windows	Alt+Shift+Key	Click
Mozilla Firefox	Linux	Alt+Shift+Key	Click
Mozilla Firefox	Mac OS X	Control+Key	Click
Mozilla Firefox	Windows	Alt+Shift+Key	Click
Microsoft Internet Explorer 7	Windows	Alt+Key	Set focus
Microsoft Internet Explorer 8	Windows	Alt+Key	Clear or set focus
Microsoft Internet Explorer 11	Windows	Alt+Key	Clear or set focus
Apple Safari	Windows	Alt+Key	Click
Apple Safari	Mac OS X	Control+Option+Key	Click

The following table lists the keyboard shortcuts that are provided with the applications. Some shortcuts can't be changed.

Action	Keyboard shortcut	Editable
Create Service Request	E	Yes
Save and Continue	V	Yes
Send	D	Yes

Action	Keyboard shortcut	Editable
Post	T	Yes
Select from Service Request	Q	Yes
Insert Knowledge	W	Yes
Add Team Members	A	Yes
Back	B	No
Cancel	C	No
No	N	No
Save and Close	S	No
Yes	Y	No
Apply	L	No
Done	P	No
Finish	I	No
Next	X	No
OK	K	No

- *Action Commands* which are task actions that you can perform on the service request. For example, create response, add internal note, update the service request milestone, assign a service request to yourself, update, and so on. The keyboard shortcut combination, Alt+Control+Key, can be used for all actions on the user

interface. This combination is applicable to both Windows and Mac OS X operating systems. The following table lists the keyboard shortcuts provided with the applications. All action command shortcuts can be changed.

Action	Keyboard shortcut
Add Action Plan	A
Show Keyboard Shortcuts	H
Open Restore Pane	P
Update	B
Assign to Me	M
Launch Cobrowse	L
Copy	C
Delete	D
Forward	F
Get Link	G
Run Queue Assignment	Q
Update Service Request Milestones	S
Customer Entry	E
Internal Note	N
Response	R

Keyboard shortcuts have default configurations. You can't create shortcuts, but you can edit some existing keyboard shortcuts. To edit keyboard shortcuts, do the following:

1. In the Setup and Maintenance work area, click the **Tasks** icon.

2. Select **Search**.
3. Search for and select the **Manage Service Request Keyboard Shortcuts** task.
4. On the Manage Keyboard Shortcuts page, select the keyboard shortcut you want to change, and update the key in the **Shortcut Key** column.
Note: Two things to remember: Keys aren't case sensitive, and no two actions or buttons can have the same keyboard shortcut.
5. Click **Save**.

How do I update a work order?

Update work orders by opening them from Service Requests, or from Work Orders on the Service springboard.

Some work orders might not be updatable for one of the following reasons:

- The work order must be in a scheduled status before it can be updated.
- The work order was created or updated and was submitted to Oracle Field Service, but not yet confirmed. A message is displayed.
- An error was discovered in the Oracle Field Service integration after the work order was created or updated. A message is displayed.
- Oracle Field Service doesn't support updating activities that are scheduled in the past so the work order scheduled date must be in the future.

To update a work order, do the following:

1. Open the work order.
2. Select the work order that you want to update.
3. Update the work order with your changes.
4. Click **Save**.
A confirmation message is displayed letting you know the change was submitted.
5. Click **Refresh** to see change confirmation. The work order is in read-only mode until the Oracle Field Service application acknowledges the change. This should only take a moment. When the change is confirmed, the Edit Work Order page appears with the change displayed.
6. Click **Save and Close**.

How do I define email templates?

You can create email templates for the Forward, Response, and System Response messages of a service request (SR).

You can create templates using HTML to send email notifications for an SR using Application Composer.

To define an email template:

1. Sign in to the application as an administrator.
2. Navigate to Application Composer.
3. In the **Application** field, select **CRM Cloud** from the drop-down list.
4. In the **Common Setup** region, click **Email Templates**.

5. On the Email Templates page, click the plus icon to create a new template.
6. In the **Object** field, select **Service Request** from the drop-down list.
7. Specify a name for the template.
8. (Optional) Specify a description.
9. To add any attachments, click the plus icon, browse to the file location, and select the file.
10. A template is active by default. To disable the template, clear the **Active** option.
11. Specify the email subject.
You can use SR field names in the subject. For example, the subject can be `Resolved issue [{Title$}]`.
12. Edit the message HTML as required. Add the `#MessageContent#` tag anywhere in the HTML code. This tag is replaced by the SR message content.
13. (Optional) To enable the display of the email thread, insert the `#PastConversation#` tag in the template.
Add this tag within the email body at the place where you want to insert the previous messages from the email thread. When an agent replies to a customer from the Messages tab in an SR, the email thread is displayed.
14. In email templates that are meant for forwarding to internal users, you can include a link to the SR within the template. Include the link in the following format:
`<Link to company's Fusion Service site>/service/faces/FuseOverview?findGlobalItemId=itemNode_service_service_requests&pSrNumber=<SR Number>`.
For example, `https://company123.mycompanydomain.com:10616/service/faces/FuseOverview?findGlobalItemId=itemNode_service_service_requests&pSrNumber=SR0000029093`.
15. Click **Save and Close**.

Note: When an SR is created, it might be with or without a queue. So it's possible that an email notification is sent before the SR is assigned to a queue. To avoid a blank field value in the email notification, you must not use the **Queue Name** field in your email template.

How do I configure chat profile options?

Chat profile options let you configure assignment and routing options for chat requests.

You must configure these chat profile options to enable various chat features.

Profile Option	Description
SVC_CHAT_OFFER_NOTIFICATION_TIMEOUT_VALUE	Specifies the number of seconds that lapse before the chat notification is automatically closed.
SVC_ENABLE_CHAT	Enables chat interactions.
SVC_CHAT_TRANSFER_TO_QUEUE_ENABLED	Enables transfer of a chat to a queue by an agent.
SVC_CHAT_IDLE_TIMEOUT	The number of seconds after which a chat is terminated if there's no activity. The default value is 600. You can set this to a minimum value of 300. If you set the value to 0, a chat is never terminated even if there's no activity.

Profile Option	Description
SVC_CHAT_WAIT_TIME_ENABLED	Enables displaying of the estimated wait time for a customer before an agent is expected to accept the chat request. The default value is Yes.
SVC_CHAT_ANONYMOUS_ACCESS_ENABLED	Enables anonymous access to chat for your customers. The default value is No.
SVC_CHAT_INLAYS_ACCESS_ENABLED	Enables access to the chat inlays to get the bootstrap configurations. The default value is No.
SVC_MCA_ENABLE_ENGAGEMENT_SYNC	Enables synchronization of all engagements between your service application and Live Window, regardless of channel.
SVC_CHAT_CKEDITOR_ENABLED	Enables style formatting options in the Live Window chat panel.
SVC_CHAT_COBROWSE_ENABLED	Enables agents to request for a cobrowse session with a customer from the Live Window chat panel.
SVC_CHAT_TRANSCRIPT_PURGE_ENABLED	Enables purging of chat transcripts.
SVC_CHAT_TRANSCRIPT_PURGE_INTERVAL	Specifies the number of days after which the chat transcripts are deleted or purged. If the value is set to 0, then the transcripts aren't deleted.
SVC_CHAT_TRANSCRIPT_DELETE_ENABLED	Enables the Delete button in the chat transcript window.
SVC_CHAT_TRANSCRIPT_PURGE_ITERATION_INTERVAL	Specifies the number of minutes between each iteration. The default value is 5 minutes.
SVC_CHAT_TRANSCRIPT_PURGE_BATCH_SIZE	Specifies the number of chat transcripts to be deleted in one iteration. The default value is 50 transcripts. This default value is ideal because trying to delete a very large number of chat transcripts at a time is very expensive and not reliable.
ORA_SVC_MCA_SMARTTEXT_IN_LW_ENABLED	Enables the ability for chat agents to insert SmartText entries into chats.
ORA_SVC_ENABLE_DEC_WITH_LIVEWINDOW	Enables the use of Live Window if Service Center has been enabled.
SVC_CHAT_INLAYS_ACCESS_ENABLED	If your implementation includes ODA integration, make sure this profile option is enabled.

Note: Agents working in the chat channel must have the ORA_SVC_CHAT_AGENT_ABSTRACT job role to use chat.

If you're using custom roles, you must include the following privileges in the custom role:

Privilege Name	Privilege Code	Description	Inherited from Role Name	Inherited from Role Code
Edit Service Request	SVC_EDIT_SR_PRIV	Allows editing of a service request.	Service Request Troubleshooter	ORA_SVC_SR_TROUBLESHOOTER
Manage Omnichannel Presence and Availability	SVC_MANAGE_OMNICHANNEL_PRESENCE_AND_AVAILABILITY_PRIV	Allows management of the omnichannel availability for new work, presence menu and indicator.	Service Request Troubleshooter	ORA_SVC_SR_TROUBLESHOOTER_HCM
Update Sales Party Contact	ZCM_UPDATE_SALES_PARTY_CONTACT_PRIV	Allows updating the sales party contacts.	Service Sales Party Management	ORA_ZCM_SR_SALES_PARTY_MANAGEMENT
Access Partner Media Toolbar	SVC_ACCESS_PARTNER_MEDIA_TOOLBAR_PRIV	Allows access to the partner media toolbar.	Service Request Troubleshooter	ORA_SVC_SR_TROUBLESHOOTER

Note: If you're using custom roles, you must also include the data security policy "Service Interaction Header." For more information about creating the Data Security Policy, see [How do I define data security policies for custom roles?](#)

To configure the chat profile options:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Communication Channels
 - o Task: Manage Chat Profile Options
2. From the profile options listed on the Manage Chat Profile Options page, click a profile option.
3. In the **Profile Values** region, in the **Profile Level** drop-down list, ensure that **Site** is selected.
4. Select **Yes** from the **Profile Value** drop-down list.

Note: For the following profile options, specify a value in seconds in the **Profile Value** field as explained in the table:

- o SVC_CHAT_OFFER_NOTIFICATION_TIMEOUT_VALUE
- o SVC_CHAT_TRANSCRIPT_PURGE_INTERVAL
- o SVC_CHAT_TRANSCRIPT_PURGE_ITERATION_INTERVAL
- o SVC_CHAT_TRANSCRIPT_PURGE_BATCH_SIZE

5. Click **Save**.
6. Repeat the previous four steps for all the listed profile options.

How do I enable email notifications to monitor milestones?

You can configure email notifications to warn required teams and managers that a milestone is about to expire, or email notifications can be used to escalate a service request when a milestone expires.

After you set up the scheduled process, you can configure object workflows to perform actions when a milestone's WarnedFlag is set to **Y** or ComplianceFlag is set to **N** (when the milestone expires).

1. Sign in to the application as an administrator.
2. Navigate to **Application Composer** and then click **Common Setup > Email Templates**. The Email Templates page is displayed.
3. Click **Create** to create a new template. The Create Email Template page is displayed.
4. From the **Object** drop-down list, select **Milestone**.
5. Specify the **Name**, **Email Subject**, and **Email Body** for the content of the email you want to send.
6. Click **Save and Close**.
7. After you create the template, Click **Navigator > Configuration > Sandboxes**.
8. Select and enter a sandbox.
9. In **Application Composer** select **CRM Cloud** in the **Application** drop-down list, and then select **Service** as the **Object Tags** option.
10. Click **Object Workflows**. The Object Workflows page is displayed.
11. Click **Create** to create a new object workflow. The Create Object Workflow page is displayed.
12. From the **Object** drop-down list, select **Milestone**.
13. Enter the **Name** and **Description** for the object workflow.
14. Specify the **Event Point** and **Condition** for the milestone object workflow.

For example, to trigger a workflow action when the `WarnedFlag` is set to **Y**:

- a. For the **Event Point** option, select **When a record is updated**.
- b. In the **Condition** field, enter the following expression:

```
if (isAttributeChanged('WarnedFlag') && WarnedFlag=='Y')
    return true;
```

15. Select the action you want to perform as part of the workflow. You can set up **Email Notification** and **Field Updates** for the milestone.
 - a. In the **Email Notification** section, click **Create** to add a new notification.
 - b. Specify the schedule and addresses to which you want to send the notifications.
 - c. Click **Save** to save the milestone object workflow.
16. Republish the sandbox in which you created the object workflow.

You can create a script for specific aspects of the workflow, such as looking up the assignee and assignee manager details for sending the notification. Here's an example script you can use to get the assignee and assignee manager details and populate the **Address** field for the email notification.

```
def resourceVO = newView('Resource')
resourceVO.appendViewCriteria("PartyId = ${AssigneePartyId}")//party id of SR assignee
resourceVO.executeQuery()
def mgrPartyId
while (resourceVO.hasNext()) {
```



```
def curResourceRow = resourceVO.next()
mgrPartyId = curResourceRow.ManagerPartyId
}
return mgrPartyId
if (mgrPartyId != null) {
def resourceMgrVO = newView('Resource')
resourceMgrVO.appendViewCriteria("PartyId = ${mgrPartyId}")
resourceMgrVO.executeQuery()
def mgrEmailId
while (resourceMgrVO.hasNext()) {
def curResourceMgrRow = resourceMgrVO.next()
mgrEmailId = curResourceMgrRow.EmailAddress
}
return mgrEmailId
}
```

How do I manage Action Plan templates?

The Manage Action Plan Templates task is used to create or edit templates that include multiple actions that must be completed to close an SR.

In the Setup and Maintenance work area, go to the following:

- Offering: Service
- Functional Area: Action Plan
- Task: Manage Action Plan Templates

Create a New Action Plan Template

To create a new action plan template:

1. Click **Create Template**.
2. Enter a name for the template.
3. Select the type of business calendar for the duration and end dates of the actions.

Note: The calendar comes from the list of schedules defined on the Subscription Management in the Manage Availability page. For more information about calendars, see the Create a Coverage Schedule topic in this guide.

4. Enter a start date for the template.
5. Enter an end date for the template (optional).
6. Check **Published** to publish the template when it's ready for agents to use.
7. Enter a **Description**.
8. Select a **Category**. Categories are available only if you set them up in the Manage Action Categories for Action Plan task.
9. Select a the **Context** from the list of values. Context values include:
 - Article
 - Case
 - HR Help Desk Request (If you're using the Help Desk offering)

- Internal Service Request (If you're using the Help Desk offering)
 - Service Request
10. If business units are enabled, select the business unit for the template.
 11. If stripe codes are enabled, select the stripe code for the template.
 12. Select **Auto Start** to choose the action plan template to start automatically.

Any Templates with this setting, once assigned using the Action Plan REST API, are started either on the next execution of the action plan scheduled job (Monitor Action Plan Actions), or a REST call to refresh the action plan..

Note: You might need to create the action plan with `Create_&_Initiate` status using the REST API. If you create it using just the Create status, it won't consider it for Auto Start on the REST scheduled job or refresh the REST action call.

13. Add actions to the template by clicking the **Add** icon in the **Action Flow** region of the page.
14. On the **Add Actions to Template** page, search for the action to add by entering a name, category, or action type.
15. Click **Search**.
16. From the search results, add an action by clicking the Add icon for the action you want to add.
17. Now, search and add all the actions you want to place on the template.

Tip:

- You might not see all actions. Actions can be limited by stripe and business unit.
- You can delete actions from the **Actions to Add** pane by clicking the delete icon.
- You can add the same action multiple times. For example, if the action is to obtain approval from two managers, add the action twice.
- You can reorder actions using the arrow icons.
- If you can't find an action, you can create actions. Click **Create New Action**.

18. When you've added all the actions you want on the template, click **Add to Template**.

On the Template page, the actions display in a list view. You can also view the template in a graphical view by selecting the graphic icon.

19. In the **Prerequisite** column, set any prerequisites for each action in the template. Select the action row in the **Prerequisites** column and click the **Add Prerequisites** icon.
20. Select the check box next to the actions that you want to make a prerequisite for the action.

Tip:

- For actions that have prerequisites, mouse over the prerequisite to show the names of the prerequisite actions.
- Use the graphical view to see the order of completion for the actions.

21. Actions are automatically set to mandatory in the **Mandatory** column. Deselect the check box to make an action optional.

If an action is identified as Optional, the agent can skip the action if it doesn't apply to a specific action plan. Mandatory actions can't be skipped.

22. Click **Save and Close** to complete the template.

Edit an Existing Template

To edit an existing template:

1. In the **Manage Action Plan Templates** task, select the template you want to edit.
2. Make your edits.
3. Click **Save and Close**.

Related Topics

- [How do I create a coverage schedule?](#)
- [How do I manage action plan actions?](#)
- [How do I update existing setup data?](#)

How do I enable multiple Business Units Fusion Service?

To enable multiple business units (BUs) for Service , you must set the following profile options:

1. Multiple Business Units Enabled (HZ_ENABLE_MULTIPLE_BU_CRM): Set this profile option to **Yes**. The default value is **No**.
2. Customer Relationship Management Business Unit Default (HZ_DEFAULT_BU_CRM): Set this to the default business unit for your service application.

Note: You must ensure that the value of the HZ_DEFAULT_BU_CRM profile option doesn't remain blank, and the value is set to a BU. Otherwise, agents might see an error while creating SRs.

To set the profile options for Service BUs:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Company Profile
 - o Task: Manage Common CRM Business Unit Profile Options

The Manage Common CRM Business Unit Profile Options page shows the two profile options.

2. Click the **HZ_ENABLE_MULTIPLE_BU_CRM** profile option.
3. In the HZ_ENABLE_MULTIPLE_BU_CRM: Profile Values region, set the **Profile Value** for the Site **Profile Level** to **Yes**.
4. Click **Save and Close**.
5. Click the **HZ_DEFAULT_BU_CRM** profile option.
6. In the HZ_DEFAULT_BU_CRM: Profile Values region, specify the **Profile Value** for the Site **Profile Level**.

7. Click **Save and Close**.

How do I manage resource teams?

This procedure describes how to manage resource teams. A resource team is a temporary group of resources formed to complete a business task. A resource team can't be hierarchically structured and isn't intended to implement an organization.

Create Resource Teams

To create resource teams:

1. Navigate to the Manage Resource Teams UI page as follows: **Navigator > Resource Directory > Tasks > Manage Resource Teams**.
2. Click the **Create** action menu option or button.
The Create Team page appears.
3. Enter an appropriate team name.
4. Optionally, enter a team description and specify team usage, resource members, and organization members.
5. Click **Save and Close**.

Edit Resource Teams

To edit resources teams:

1. Navigate to the Manage Resource Teams UI page as follows: **Navigator > Resource Directory > Tasks > Manage Resource Teams**.
2. Search for the resource team that you want to edit.
You can search by entering criteria such as the team name, number, and usage. You can also use the saved searches.
3. Select the resource team you want to edit from the Search Results region and click its name to navigate to the Edit Team page.
4. On the Edit Team page, you can edit the team's details such as the team name, description, usage, resource members and organization members.
5. Click **Save and Close**.

Why can't I find newly created articles, categories, and products in Knowledge Authoring and My Knowledge?

Sometimes newly created articles, categories, and products don't appear in Knowledge Authoring and My Knowledge. To make these missing items available to your knowledge users, you need to run some knowledge scheduled processes and assign locales to knowledge users.

1. Schedule and run the following knowledge processes:

- Knowledge Content Batch Process: This job updates Knowledge categories and products to reflect recent changes to Service and HCM products and categories. Schedule this job to run only once per day. Running this job more frequently isn't recommended.
 - Knowledge Search Batch Process: This job updates Knowledge search to reflect any changes to knowledge base content. Schedule this job to run every 15 minutes.
2. Assign locales to users. For more information, see [Why can't I create articles in Knowledge Authoring?](#)

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

Note: You need the SVC_SCHEDULE_SERVICE_JOBS_PRIV authorization to schedule Knowledge processes.

To run the scheduled processes:

1. Go to **Tools**, and click **Scheduled Processes**.
2. Click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** as the process type.
4. In the **Name** field, type "Knowledge", and press Enter.

This displays the list of available Knowledge processes.

5. Select the process you want to schedule and click **OK**. You need to repeat the steps for each of the following processes:
 - Knowledge Content Batch Process
 - Knowledge Search Batch Process
6. Click **OK** in the Schedule New Process dialog box to go to the Process Details page for the job.
7. Click **Process Options**, choose the options you want, and click **OK** to return to the Process Details page.
8. Click **Advanced** and for **Run** select **Using a schedule**.
 - For the Knowledge Content Batch Process, set the following:
 - **Frequency:** Daily
 - **Days Between Runs:** 1
 - **Start Date**
 - **End Date**
 - For the Knowledge Search Batch Process, set the following:
 - **Frequency:** Hourly/Minute
 - **Time Between Runs:** Hours 0 Minutes 15
 - **Start Date**
 - **End Date**
9. Click **Submit**.

How do I add concepts and synonyms?

You can add concepts to the search dictionary. You can also add, update, and delete synonyms for existing concepts.

Note: This answer is applicable to Fusion Service Knowledge Management with the Classic User Experience.

To add concepts and synonyms:

1. Click **Setup and Maintenance** and navigate to the **Knowledge Management Search Dictionary** task.
2. Click the + symbol in the **Manage Search Dictionary** page.
3. Complete the fields **Concept Name** and **Description**.

Note: You need to add the concept name as a synonym. For example, if you created a concept named "mobile", you also need to add a synonym named "mobile".

4. To add a synonym, click the + symbol in the **Concept Details** window.
5. Enter the **Synonym** name and select the **Language** from the drop-down list and save it.

Note: You can add synonyms only for your active languages.

What are entitlements?

Service entitlements are benefits or privileges you provide to customers when you extend service to them.

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

Here's the ready-to-use milestones you get with the application:

- **First Response Metric:** Tracks how quickly you agree to respond to a customer after the service request is received.
- **Resolution Metric:** Tracks how quickly you must resolve the service request for the customer.

In addition, you can also set up administrator-defined milestones that define other service levels you want to track for your customers.

When you create a service request for a customer, milestones are automatically assigned to the service request based on the defined service coverages. You can apply milestones to a service request by defining the coverages as follows:

- **Standard Coverages**, which act as templates.
- **Default Coverages**, which associate the standard coverage templates with a customer (customer-level default), or specify a standard coverage template as a global default that's applicable to all service requests.
- **Subscription Coverages (or Service Contracts)**, which you can optionally create to apply coverages only to specific assets or products owned by a customer.

Note: New customers are automatically opted-in to use Subscription Management instead of Service Contracts. For existing customers implementing service entitlements for the first time, Oracle recommends the use of the subscription coverages. Customers already using Service Contracts are still supported, however new features such as product-based service level agreements (SLAs) are only available with Subscriptions. For more information, see [How do I enable subscription coverages for entitlements?](#) When the same milestone exists in coverages at multiple levels, the subscription (or contract) values take priority over customer-level default values, which in turn take priority over global default values.

To apply milestones for specific assets or products, you must set up Subscriptions (or Service Contracts), opt-in to use installed base assets from the common asset model, and allow an installed base asset to be picked on a service request. If you use Subscriptions (or Service Contracts), you specify the standard coverage on a contract line and identify which installed base assets or products are covered. When an installed base asset or product is selected on a

service request, contract-based coverages are applied to the milestone determination. When a service request specifies an installed base asset or product that's covered on a subscription (or service contract), that corresponding coverage is automatically considered when applying milestones to the service request.

Note: For any service requests without a covered asset or product, the existing global and customer default coverages apply.

How do I set up milestones and coverages?

You must set up milestones and coverages so that the ready-to-use milestones are automatically applied to service requests and monitored.

New customers are automatically opted-in to use Subscription Management instead of Service Contracts. For existing customers implementing service entitlements for the first time, Oracle recommends the use of the subscription coverages. Customers already using Service Contracts are still supported, however new features such as product-based service level agreements (SLAs) are only available with Subscriptions. For more information, see [How do I enable subscription coverages for entitlements?](#)

Here's the steps you require for this set up:

1. Manage milestone configuration (optional)
2. Create a coverage schedule (optional)
3. Create a standard coverage
4. Apply the standard coverage as global and customer defaults
5. Configure the scheduled process to monitor SR milestones
6. Add current milestone fields to the SR layout (optional)
7. Configure email notifications or other event actions from an object workflow (optional)

How do I create a coverage schedule?

To create your own coverage schedule calendars with the intervals and holidays specific to your business, do the following:

1. Sign in to the application as a sales administrator.
2. On the **Navigator**, click **Subscription Management**.
The Subscriptions page is displayed.
3. Click **Subscription Configuration**.
The Subscription Configuration page is displayed.
4. To create a coverage schedule, click **Entitlements Management > Manage Availability**.
The Manage Availability page is displayed.

Note: If you're using Service Contracts, then you navigate to this page by clicking **Navigator > Contract Management > Contracts > Tasks > Manage Availability**.

5. (Optional) To add the holidays, nonworking times, or extended working hours that are applicable to the coverage schedule, click the **Exceptions** tab.
 - a. Click **Create** in the **Exceptions** pane to create a new coverage schedule exception, or select an existing entry and click **Duplicate** to copy and update it.
 - b. In the **Availability Exceptions** section, click **Add Event**.
 - c. Enter the name of the exception event, the date and times of the event, and the availability during the event.
 - d. Click **Save**.
 - e. (Optional) To delete an exception, click **Delete** in the **Exceptions** pane.
6. On the **Schedules** tab, click **Create** in the **Schedules** pane to create a new coverage schedule, or select an existing entry and click **Duplicate** to copy and update it.
7. Specify the following details:
 - o **Schedule Name**: Name of the coverage schedule.
 - o **Time Zone**: Time zone for which you're creating the coverage schedule.
8. In the **Date Intervals** section, create a coverage schedule interval with details of when the coverage schedule starts, ends, and the days of the week that are part of the interval.
 - o **Start Date** and **End Date**: Start and end dates for the coverage schedule interval.
 - o **Availability**: Working days, hours, and times, and break times for the selected days.
9. (Optional) To include exceptions in the coverage schedule, select an exception from the **Exceptions** drop-down list.
10. (Optional) To delete a schedule, click **Delete** in the **Schedules** pane.
11. Click **Save**.

You can create multiple coverage schedules and use them as needed in the standard coverage templates. For example, you might have a high severity service request milestone worked using a **24 by 7** schedule, but a lower severity service request milestone might use a different schedule that's only worked during normal business hours. For more details about using coverage schedules in standard coverages, see the "Create Standard Coverages" topic.

How do I create default coverages?

You use default coverage to apply a standard coverage template to specific customers, or globally to all customers.

When a service request is evaluated to assign milestones, the application considers all global coverages, and customer default coverages setup for the customer specified on the service request. If a milestone is applicable from both a global default and a customer default coverage, the application uses the customer default coverage values over the global defaults.

1. On the Subscription Configuration page, click **Entitlements Management > Default Coverage**.

The Manage Default Coverage page is displayed.

Note: If you're using Service Contracts, then you navigate to this page by clicking **Navigator > Contract Management > Contracts > Tasks > Default Coverage**.

2. Click **Create** to add a new coverage.
3. Select the **Default Level** for the coverage:

- o Select **Global** to assign the coverage to all customers.
Then select the standard coverage in the **Coverage** column that you want to apply to all customers.
- o Select **Customer** to assign the coverage to a specific customer.

Then select the customer in the **Default Level Value** column, and then select the standard coverage in the **Coverage** column that you want to apply to that customer.

4. Enter the start and end date for the coverage.
5. Click **Save**.

What are the SR profile options?

Service request profile options let you configure and control application data. Administrators and setup users can manage SR profile options in the Setup and Maintenance work area.

You can set various profile options and schedule job processes for service requests. Some profile options must be used along with job processes to achieve the results you want. For example, after setting the profile value for closing a resolved SR after N number of days, schedule a job process that closes SRs.

The following table describes the various profile options for service request management. For more information on scheduled processes, see [What are scheduled processes?](#)

Profile Option	Description
SVC_ASSIGN_TO_QUEUE_ON_CREATE	<p>Assigns an SR to a queue automatically, when the SR is created.</p> <p>Note: The preferred way of assigning an SR to a queue is by using Omnichannel assignment. If Omnichannel is enabled, this profile option is ignored.</p>
SVC_SR_IN_RESOLVED_DAYS	<p>Defines the number of days after which any resolved SR is automatically closed. This profile option must be used along with the <i>Auto-Close Service Requests</i> job process.</p> <p>Make sure the following two conditions are met:</p> <ul style="list-style-type: none"> • The SVC_SR_IN_RESOLVED_DAYS profile value must be set to 1 or greater for the Auto-Close Service Request job to run. • The SVC_SR_IN_RESOLVED_DAYS profile value must be set to 0 to disable the Auto-Close Service Request job.
SVC_SR_IN_WAITING_DAYS	<p>Defines number of days for which a service request must be in Waiting status before the SR is auto resolved. This profile option must be used along with the <i>Auto-Close Service Requests</i> job process.</p> <p>Make sure the following two conditions are met:</p> <ul style="list-style-type: none"> • The SVC_SR_IN_WAITING_DAYS profile value must be set to 1 or greater for the Auto-Close Service Request job to run. • The SVC_SR_IN_WAITING_DAYS profile value must be set to 0 to disable the Auto-Close Service Request job.

Profile Option	Description
SVC_AUTO_CLOSED_STATUS_CD	Defines the status code to use for auto-closing service requests that have been in Resolved status for at least the number of days specified by SVC_SR_IN_RESOLVED_DAYS. This profile option must be used along with the <i>Auto-Close Service Requests</i> job process.
SVC_AUTO_RESOLVED_STATUS_CD	Defines the status code to use for auto-resolving service requests that have been in Waiting status for at least the number of days specified by SVC_SR_IN_WAITING_DAYS. This profile option must be used along with the <i>Auto-Close Service Requests</i> job process.
SVC_PUID_FORMAT	<p>Defines the format for the unique reference number on each SR.</p> <p>Every SR number consists of a prefix and radix. Let's say that you select SR_ as the prefix and No alphanumeric conversion as the radix. Without this formatting profile option, the SR numbers are generated as SR_1, SR_2, and so on. Now suppose you use this formatting profile option and the value is 000000. Then the SR numbers are generated as SR_000001, SR_000002, and so on.</p> <p>For more information about configuring the prefix and radix, see How do I configure the prefix and radix?</p> <p>Note: The SVC_PUID_PREFIX profile option used earlier no longer exists.</p>
SVC_SR_DEFAULT_SEVERITY_CD	Sets the default Severity value for a new SR. You can also set this value as blank, if you want the SRs to be created without a Severity value.
SVC_SR_DEFAULT_STATUS_CD	Sets the default Status code for a new SR.
SVC_SR_IN_DELETED_DAYS	<p>Defines the number of days after which a deleted SR is purged. Although a soft deleted SR is in the database, it can't be retrieved or updated from the UI or REST APIs. Once purged, SRs are completely removed from the database. This profile option must be used along with the <i>Purge Deleted Service Requests</i> job process to purge SRs.</p> <p>When a soft-deleted SR created from an inbound email is purged, all data associated with that SR is also purged from the inbound message tables.</p>
SVC_INBOUND_ENABLE_FAILED_MESSAGE_PURGE	Enables or disables purging of inbound messages that fail or aren't processed successfully. When the value is set to Yes, the purge job deletes the records corresponding to such messages from the inbound message tables.
ORA_SVC_ENABLE_DOWNLOAD_ATTACHMENT	<p>This profile option has two settings. Yes (default) and No. If the profile option is set to Yes, attachments are allowed to be downloaded.</p> <p>To prevent users from being able to download attachments from a Service Request and a Service Request Message, do the following:</p> <ol style="list-style-type: none"> 1. Set the ORA_SVC_ENABLE_DOWNLOAD_ATTACHMENT profile option value to No. 2. Copy the Service Request Troubleshooter role. 3. Copy the Customer Service Representative role. 4. Edit the custom Service Request Troubleshooter role and delete the Download Attachment of an SR or SR Message privilege. 5. Edit the custom Customer Service Representative role and delete the three Service Request Troubleshooter roles and add the custom Service Request Troubleshooter role. 6. Add the custom Customer Service Representative roles to the users who should not be allowed to download attachments.

Profile Option	Description
SVC_EVENT_HISTORY_DAYS_TO_KEEP	Specifies the number of days for which the SR event history details such as update and create must be retained. The data beyond this value is purged.
SVC_INBOUND_MSG_RETENTION_DAYS	Specifies the number of retention days for successfully processed inbound messages. After the specified number of retention days, the successfully processed inbound messages are deleted from the inbound message tables.
SVC_ENABLE_MESSAGE_CORRECTION	Enables you to edit the text of the Internal Note and Customer Entry SR messages that you've previously created and posted.
SVC_ENABLE_SEVERITY_COLOR_IN_SR	Enables the color code for the service request severity set up in the Manage Service Request Severities task, if set to Yes. The task Manage Service Request Severities enables you to add different severity levels for service requests and define different colors.
ORA_ENABLE_QUEUE_MEMBER_NOTIFICATIONS	Enables selecting all queue members as notification recipients, on the Notification Preferences page. Performance might be impacted if you have many queue members and use this option. Default value is No.
ORA_SVC_DELETE_CLOSED_SR_ENABLED	Enables automatic deletion of an SR that has been closed for at least the number of days specified by the ORA_SVC_CLOSED_SR_RETENTION_DAYS profile option. This profile option must be used along with the Delete Closed Service Requests job process.
ORA_SVC_CLOSED_SR_RETENTION_DAYS	Defines the number of days for which a service request must remain closed before it's deleted. Deletion can't be undone. This action is applicable only when the Delete Closed Service Requests Enabled profile option is set to Yes. This profile option must be used along with the Delete Closed Service Requests job process.

How do I set notification preferences?

The Notification Preferences page enables administrators to configure the notification rules. Users who have the ORA_SVC_SR_ADMINISTRATOR or ORA_SVC_SR_POWER_USER duty roles can access this page.

Notification preferences are used to select multiple recipients like team members, queue members, and so on. When notification preferences is used, it will override the recipients that are set in the Groovy code.

Here's how you configure the notification rules:

Note: Ensure that your triggers are published.

1. Sign in to the application as an administrator.
2. In the **Navigator**, click **Tools > Notification Preferences**.

The Notification Preferences page is displayed.

3. From the **Object** drop-down list, select **Service Request** or **Work Order** .

Note: Other supported objects are also displayed in the **Object** drop-down list.

- a. Click **Add**. A blank row is added in the table.
- b. To enable the notification trigger, select **Yes** from **Enabled** drop-down list.
- c. To prevent users from personalizing this notification through the User Notification Preferences page, select **No** from the **OverrideFlag** drop-down list.

Note: To clean up the user notification preferences data, in case the resource leaves your company or is no longer active, run the **Purge Obsolete User Preferences** scheduled process. This scheduled process lets your organization ensure that your data on user notification preferences isn't stale.

- d. Select a Groovy notification trigger from the **Triggering Event** drop-down list.
- e. Enter the **Notification Name** and **Description**.
- f. In the **Recipients** column, click **Edit**.

The **Configuration for Trigger Name** dialog box is displayed.

- g. Select the notification delivery options for the respective recipients.

For an enabled triggering event, notifications are sent to the specified recipients only if you select at least one delivery option. If any delivery method is selected for a specific recipient, that recipient will also receive bell notifications. Also, if you don't select the **Bell Notifications** option, then no notifications will be sent to the specified recipients.

The following tables describe the recipients and delivery options for the service request object:

Recipients for Service Request Object	Delivery Options for Service Request Object
<ul style="list-style-type: none"> - Assigned To: Resource to whom the service request is assigned. - Manager of Assigned To: Manager of the resource to whom the service request is assigned. <p>If a service level agreement is about to expire, and immediate attention is required, the manager of the resource to whom the service request is assigned, can be informed.</p> <ul style="list-style-type: none"> - Resource Team: Extra resources that have been added to a service request on the Team subtab. <p>If you've a team of resources collaborating on a service request, and a trigger such as the service request escalating to Critical status happens, the entire team can be informed.</p>	<ul style="list-style-type: none"> - Bell Notifications: Sends a bell notification to the web application. - Mobile Notifications: Sends a mobile push notification to the Oracle Fusion Cloud Mobile application. - Browser Notifications: Sends a real-time notification to the desktop of the selected users that are signed in the Omnichannel toolbar, when a predefined trigger is executed. - Email Notifications: Sends an email notification to the selected internal recipients' primary work email ID saved in the application. <p>Note: The from email address is configured through the SVC_OUTBOUND_EMAIL_FROM profile option. If that isn't specified, the default from email address <code>noreply@oracle.com</code> is used.</p>

Recipients for Service Request Object	Delivery Options for Service Request Object
<ul style="list-style-type: none"> - Queue Owner: Owner of the queue. If your organization uses manual assignment, the queue owner can be notified when a new service request is associated with a queue owned by the queue owner. For information about the setup steps required to send a notification to a queue owner, see the "Trigger a Notification to the Queue Owner" section. - All Queue Members: Send defined notifications to all members of a specified queue, so that they can effectively monitor the queue for open items. Queue notifications reduce the need for agents to manually check each queue they're associated with, to see whether there's new work. To enable this recipient option, set the profile option <code>ORA_ENABLE_QUEUE_MEMBER_NOTIFICATIONS</code> to Yes. This profile option is disabled by default. You should only enable this option if your queues have a few participants. If your organization's queues have many members, enabling notifications to all of them might affect application performance. 	

The following tables describe the recipients and delivery options for the Work Order object:

Recipients for Work Order Object	Delivery Options for Work Order Object
<ul style="list-style-type: none"> - Assigned To: Resource to whom the work order is assigned. - Created By: The user who created the Work Order 	<ul style="list-style-type: none"> - Bell Notifications: Sends a bell notification to the web application. - Browser Notifications: Sends a real-time notification to the desktop of the selected users that are signed in the Omnichannel toolbar, when a predefined trigger is executed.

Recipients for Work Order Object	Delivery Options for Work Order Object
<ul style="list-style-type: none"> - Field Service Resource ID: The resource ID being used to complete the work order - Last Updated By: The user who last updated the work order. - Manager of Assigned To ID: Manager of the resource to whom the work order is assigned. <p>If a service level agreement is about to expire, and immediate attention is required, the manager of the resource to whom the work order is assigned, can be informed.</p> <ul style="list-style-type: none"> - Requested By: The user who reported this work order. 	<ul style="list-style-type: none"> - Email Notifications: Sends an email notification to the selected internal recipients' primary work email ID saved in the application. <p>Note: The from email address is configured through the SVC_OUTBOUND_EMAIL_FROM profile option. If that isn't specified, the default from email address <code>noreply@oracle.com</code> is used.</p>

- h. To let users follow a specific service request and receive all notifications for that service request, select the **Enable Followers** check box.

When enabled, users with the correct permissions will see the **Follow** option in the **Actions** menu of the Service Request Details page.

The notification followers receive notifications for all supported channels, when any notification event is triggered for the service requests they follow.

To enable this feature for the site, set the `ORA_ENABLE_FOLLOW_NOTIFICATIONS` profile option to **Yes**.

To follow a service request, users must have the `SVC_GET_SR_FOLLOW_NOTIFICATIONS` permission. This privilege is added to the following ready-to-use duty roles:

- Service Request Administrator
- Service Request Channel User
- Service Request Contributor
- Service Request Power User
- Service Request Troubleshooter

Note: To evaluate whether a resource is still valid and enabled to follow specific service requests, run the **Purge Obsolete Notification Followers** scheduled process. This scheduled process removes inactive and end-dated users from following the service request, so that the application doesn't get overloaded with stale data. This scheduled process lets your organization ensure that your data on notification followers isn't stale.

- i. Click the **New SmartText** link and enter the **Notification Text** for the selected object.

For more information about using SmartText, see the "Using SmartText" topic.

4. (Optional) To delete a notification preference, select the row and click **Delete**. The associated notification text is also deleted.

Note: If you delete a notification that uses a Groovy notification trigger, you can create a new notification using the same trigger, if no other notification uses it.

5. (Optional) To change an existing notification text, click the **Update SmartText** icon for the selected row.
6. Click **Save**.

What happens when I change queue properties?

Here's what happens when you change the properties of an existing queue.

Change	What happens	What you need to do
Disable an active queue	<ul style="list-style-type: none"> • The queue still appears in the UI in the Queues list. It doesn't appear in other locations, such as when editing an SR, or in searches during a queue assignment. • Assignment Manager continues to assign work items to the queue without assigning an agent (just like in a manual queue). • Any unassigned work items in the queue remain unassigned. 	<ul style="list-style-type: none"> • Delete any assignment rules associated with the queue. • Manually assign any unassigned work items in the queue.
Change an automatic queue to manual	Any new or existing work items in the queue are no longer automatically assigned.	Manually assign these work items.
Change a manual queue to automatic	<ul style="list-style-type: none"> • Existing work items in the queue at the time of the change aren't routed automatically. • Any new work items that come into the queue are routed automatically. 	Manually assign existing work items.
Rename a queue	Renaming a queue doesn't affect work items already in a queue. However, Assignment Manager will continue to assign work items to the renamed queue using the existing assignment rules.	You don't need to do anything.

How do I set up groovy notification triggers?

As an administrator, here's how you configure notifications after you've enabled the notifications feature:

1. Define notification triggers as Groovy scripts in **Application Composer**, containing the conditions that must be met for each notification. Notifications are triggered when the defined conditions are met. For example, a trigger can be defined to send a notification when a high severity SR has been assigned to an agent. For more information about defining notification triggers, see the "Define Notification Triggers" section.
2. Configure the notification preferences using the Notification Preferences page. For example, to specify the notification message using SmartText, and the notification recipient.

For more information about notification preferences, see the "Set Notification Preferences" section.

Note:

- You can temporarily disable all notifications using the profile option SVC_DISABLE_BO_NOTIFICATIONS. Oracle recommends to use this option when you're doing a bulk import of data, so that you don't get multiple notifications.
- You can temporarily enable or disable specific notifications from the Notification Preferences page.

How do I enable notifications?

A notification is an alert for users such as service agents and managers, to notify them about an event on the service request, and enable them to take the necessary actions.

As a prerequisite, to allow users to view notifications, you must enable a profile option.

Enabling notifications is a global setup and feature opt-in step. Here's how you enable the notifications feature for service requests:

1. Sign in to the application as a setup or administrator user.
2. Navigate to **Setup and Maintenance**.
3. Select the **Service** offering.
4. In the **Functional Areas** section, select **Change Feature Opt In**.
5. Select the **Enable** check box for in the **Productivity Tools** row.
When the **Notifications** feature is enabled, bell notifications are automatically enabled for service requests.
6. Click the **Edit** icon in the **Features** column of the **Productivity Tools** row.
7. Enable your required notification delivery channels:
 - To enable push notifications for mobile devices, select the **Enable** check box for **Mobile Notifications**.
 - To enable browser notifications, select the **Enable** check box for **Browser Notifications**.
 - To enable email notifications, select the **Enable** check box for **Use Email as a Notification Delivery Channel**.
8. Click **Done** on the Edit Features Productivity Tools page.
9. Click **Done**.

How do I assign agents to work items?

You can assign agents manually or automatically based on the Distribution option you select for the queue.

In a manual queue, the service manager or an agent with the correct permissions assigns or reassigns each work item to an agent. Agents can also assign work items to themselves.

In an automatic queue, assignment of work items is automatic, based on assignment rules. Agents assigned to the queue can receive work items if they meet all these criteria:

- Signed in to the application

- Available to accept work orders
- Can take on more work

Note: Remember, you can use automatic queues only if your administrator has enabled Omnichannel.

When you assign agents to multiple queues, be aware that capacity limits are calculated for individual queues. So, if you assign an agent to multiple queues they might get overloaded.

How do I view the milestone diagnostics report?

Here's how you can view the milestone diagnostics report:

1. In the Setup and Maintenance work area, go to the following:
2. On the Manage Milestone Configuration page, click **Actions > View Milestone Diagnostics**. The Service Request Milestone Diagnostics page is displayed.
3. Enter the request number in the **Service Request** field.
4. Click **Check Milestones**.

The milestones that are applicable to the specified request are displayed in a table, with the corresponding metrics and the following details:

- **Defined for BU:** Indicates whether the milestone configuration definition was created for the applicable business unit.
- **Applicable to SR:** Indicates whether the milestone from the specified coverage would be applied to the request.
- **Notes:** Provides more information when the milestone isn't applicable to the request.

How do I configure the prefix and radix?

When a service request (SR) is created, a unique number or ID is generated for it by the application.

Users can't easily read or use these unique IDs because of their length and complexity. As an administrator, you can configure the unique ID that's generated to make it more user-friendly, readable, and specific to your requirement.

This user-friendly value called the public unique ID consists of a prefix and a radix, and you can configure both of them. For example, SR_0000027413 is a configured public unique ID, where SR_ is the prefix and 0000027413 is the radix or suffix.

To configure the prefix and radix for SRs:

1. Sign in to the application as a setup user or administrator.
2. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Productivity Tools
 - Task: Manage Public Unique Identifier Sequence Generation

3. On the Manage Public Unique Identifier Sequence Generation page, for the Service Request **Object Name**, specify a prefix of your choice in the **Prefix** column. For example: SR-.
4. Click in the **Radix** column for the Service Request object.
5. From the multiple options displayed in the drop-down list, select the type of radix that you want for your SRs . This option determines the radix value of the request number. To format the auto generated radix value, you can configure the SVC_PUID_FORMAT profile option as described in the "Profile Options for SR Management" topic.
Note: For more information about the types of public unique IDs, see the Oracle Fusion Cloud Sales Automation Implementing Sales guide.
6. Click **Save and Close**.

How do I validate my inbound and outbound email setup?

You can verify your inbound and outbound email configurations by using the Inbound Email Configuration and Validation page.

On this page, you can proactively take corrective actions to fix any wrong or missing configuration. The validations on this page save you the trouble of raising a support ticket or checking the logs.

Use the Inbound Email Configuration and Validation page to do the following validations:

- Inbound email channel profile options
- Channel setup
- Access points for inbound email
- Outbound email flow
- Inbound email flow

To verify your email channel configurations:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Communication Channels
 - Task: Manage Email Configuration, Registration, and Validation

The Inbound Email Configuration and Validation page is displayed.

2. In the Email Configuration region, click **Validate**.

The following validations happen in this region:

- **Channel Setup:** Checks whether you've done the following:
 - Configured at least one non predefined channel.
 - Specified a Business Unit for every channel.
- **Profile Option:** Reads the SVC_INBOUND_EMAIL_ADDRESSES profile option for email addresses and displays an error message if email addresses aren't defined.

- **Access Point Setup:** Checks whether the access points are registered appropriately. It's important to register the correct access points.

For each setup or configuration that's valid, a tick mark is displayed.

If the configuration is invalid or the setup isn't done correctly, a cross mark is displayed. A suitable message is displayed, describing the corrective action that you must take.

3. In the Email Flow region, in the **Recipient** field, enter your company's test mail ID.

The email flow for the outbound and inbound emails is validated here.

4. Click **Validate**.

The following validations happen in this region:

- Outbound Email Validation:

An outbound email is sent to the specified email address and it's verified whether the message is delivered successfully.

- If the host, port, or password are incorrect, a suitable error message is displayed and the status is displayed as DELIVERY_TO_GATEWAY_FAILURE.
- If the email is delivered successfully, the status code is displayed as DELIVERY_TO_GATEWAY_SUCCESS.

- Inbound Email Validation:

The following validations happen:

- i. Test emails are sent to all the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option and the delivery status is verified for each message.
- ii. If an email address isn't registered as an access point, then you can't receive emails from that email address. The status appears as DELIVERY_TO_CLIENT_FAILURE. An error message is displayed, explaining the suitable action to be taken.
- iii. For each email address specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option, a success or failure message is displayed along with the status.

The status is displayed as:

- DELIVERY_TO_CLIENT_SUCCESS: When the inbound email is received successfully by the access point.
- DELIVERY_TO_CLIENT_PENDING: When the message is received but not yet processed. You must verify whether the inbound poll job is scheduled.
- DELIVERY_TO_CLIENT_FAILURE: When the access point isn't registered.

5. Click **Reset** to clear the **Recipient** field and all the messages related to the recipient.

How do I use Service Logistics Parts Order with work orders?

To order parts on work orders, you need to expose the **Parts Order** region and the **Service Request Work Order Parts Order** tab on the Work Order page. If you're using Service Logistics, you must expose the Service Logistics Parts Order region from Setup and Maintenance.

Note: You must have a role that contains the following privileges:

- Setup and Maintain Applications
- Setup Service
- Setup Service Work Order

To expose the Service Logistics **Parts Order** region and **Service Request Work Order Parts Order** tab, do the following:

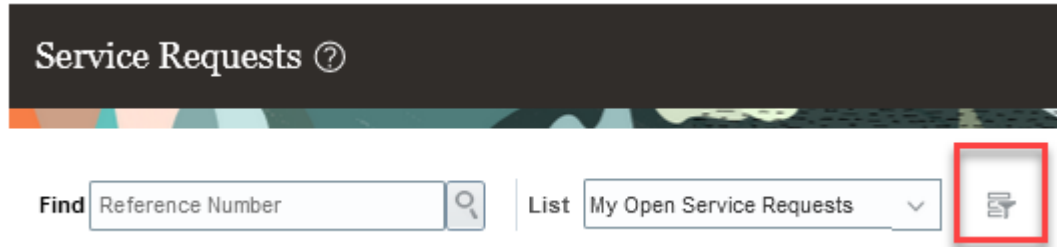
1. Go to Setup and Maintenance:
 - Offering: Service
 - Functional Area: Change Feature Opt-in
2. In the Service row, click the **Edit** icon in the Features column.
3. Click the **Enable** icon for **Service Logistics Parts Order**.
4. In the Feature Name: Service Logistics Parts Order window: select the following:
 - **Service Request Parts Order** check box to enable only part orders (no field service work order).
 - **Service Request Work Order Parts Order** check box for both parts and work orders.
5. Click **Save and Close**.
6. Click **Done**.
7. Click **Done** on the Opt In page.

The Service Request Parts Order region and tab now appear on the Work Order page. Refer to the [Getting Started with Service Logistics Cloud Implementation](#) guide to continue setup of Service Logistics.

How do I do an advanced search on service requests?

Use advanced search to narrow down search results by entering more specific criteria. For example, to see all the open SRs that are assigned to your subordinates and are in progress, do the following:

1. Click the **Show Advanced Search** button as shown in the following screenshot:



2. Select **All Open Service Requests** in the **Saved Search** field.
3. For the **Record Set**, select **Equals** and **Assigned to my subordinates**.
4. For the Status, select **Equals** and **In Progress**.
5. Optionally, click **Add** to add more search criteria.
6. Optionally, click **Save** to save the search for future use.
7. Click **Search** to see the search results.

How do I create and edit private SmartText entries?

Create your own SmartText entries. They're only visible to you, and they're saved in the Private Set tab.

1. On the Create or Edit Service Request page, click the Navigator, choose Tools, and then SmartText.
2. Click the **Create** icon on the **Private Set** tab.
3. On the **Manage SmartText** page, click the **Private** tab.
4. Make sure the default value of **Service** appears in the **Domain** drop-down list.

Note: To create SmartText entries for Chat, make sure to choose Chat from the Domain drop-down list.

5. Make a selection from the **Business Unit** drop-down list (if available).

If the HZ_ENABLE_MULTIPLE_BU_CRM profile option is enabled (set to Y) you'll have access to this drop-down list.

If you're an administrator, the drop-down list displays all BUs in your organization. If you're not you're shown only the BUs that you're assigned to along with the Null "No associated business unit" value which is visible to administrators and agents across your organization.

Note: A default business unit is assigned whether you have multiple BUs enabled or not. The default BU is set up when you configure the HZ_DEFAULT_BU_CRM profile option.

6. Select a folder in which you want to create the public SmartText entry. You can either select an existing folder, or create a new folder to save your SmartText entry.

Note: **Root** is a reserved folder name and administrators can't create a folder with this name.

7. Click the **Create (+)** icon and select **New SmartText**.
8. On the **Manage SmartText** page, enter the following details:
 - o Enter a name for the SmartText entry. There are some restrictions on special characters, so see *What are the SmartText naming conventions?*
 - o Select **Use HTML** to use rich text formatting in your SmartText entry. You can insert tables and images here.

- Enter the text you want to insert.
 - Insert a variable, if you want, by typing the @ symbol followed by the variable name. Click the **Tab** key to automatically complete the variable, or use the navigation arrows on your keyboard, then press the **Enter** key. The variable is inserted where the cursor stands in your text.
 - Click **Save as Personal**.
9. To edit the Private SmartText entry, do the following:
- Select the SmartText entry you want to edit.
 - Select the **Language** of the SmartText entry from the drop-down list
 - You can also create in a new language by clicking the **Add** icon.
 - Edit the Private SmartText entry and click **Save as Personal** to publish the SmartText entry.

You can view and manage all your Private SmartText entries from the Private SmartText tab. You can add, duplicate, and delete your private set SmartText entries.

How do I create and edit public SmartText entries?

Create your own Public SmartText entries. Public entries are available to all users.

To create a Public SmartText entry, do the following:

1. On the Create or Edit Service Request page, click the Navigator, choose Tools, and then SmartText.
2. Click the **Create** icon on the Public tab.
3. On the **Manage SmartText** page, click the **Public** tab.
4. Make sure the default value of **Service** appears in the **Domain** drop-down list.

Note: To create SmartText entries for Chat, make sure to choose Chat from the Domain drop-down list.

5. Make a selection from the **Business Unit** drop-down list (if available).

If the HZ_ENABLE_MULTIPLE_BU_CRM profile option is enabled (set to Y) you'll have access to this drop-down list.

If you're an administrator, the drop-down list displays all BUs in your organization. If you're not you're shown only the BUs that you're assigned to along with the Null "No associated business unit" value which is visible to administrators and agents across your organization.

Note: A default business unit is assigned whether you have multiple BUs enabled or not. The default BU is set up when you configure the HZ_DEFAULT_BU_CRM profile option

6. Select a folder in which you want to create the public SmartText entry. You can either select an existing folder, or create a new folder to save your SmartText entry.

Note: **Root** is a reserved folder name and administrators can't create a folder with this name.

7. Click the **Create (+)** icon and select **New SmartText**.

8. On the **New SmartText** page, do the following:

- Enter the name for the SmartText entry. There are some restrictions on special characters, so see *What are the SmartText naming conventions?*

- Select **Use HTML** to use rich text formatting in your SmartText entry. You can insert tables and images here.
 - Enter the text you want to insert.
 - Insert a variable, if you want, by typing the @ symbol followed by the variable name. Click the **Tab** key to automatically complete the variable, or use the navigation arrows on your keyboard, then press the **Enter** key. The variable is inserted where the cursor stands in your text.
9. Select **Publish** to save this entry in the **Public** tab for all users. If you don't select **Publish**, the SmartText entry is saved in your **Private** folder and is available only to you.
 10. Verify the location where you're saving the SmartText.
 11. Select the availability of the SmartText entry from the list of **Availability** options.
 12. Click **Publish** to publish the SmartText entry.

To edit a Public SmartText entry, do the following:

1. Select the SmartText entry you want to edit.
2. Select the **Language** of the SmartText entry from the drop-down list
3. You can also create a new language by clicking the **Add** icon.
4. Edit the Private SmartText entry and click **Publish** to publish the SmartText entry.

How do I use SmartText?

A SmartText entry is a reusable fragment of text that you can use. SmartText saves time and effort by reducing your keystrokes while also improving the overall consistency of written communication.

You can create your own SmartText entries, or use those that are already available for general use. You can also create SmartText entries in any supported language.

Note: You can use plain text and HTML to create SmartText entries for use in Chat windows and Service Request Message fields. Other SR fields, such as Problem Description and Solution Description only support plain text.

There are two kinds of SmartText:

- Private: You create these entries yourself and you're the sole user.
- Public: Public entries are available to all users.

SmartText entries for Service Request fields can contain system variables and user-defined variables. SmartText for chat supports only user-defined variables. System variables are public and can't be edited or deleted. User-defined variables are private, you can create, edit and delete them. For example, say you had a variable where you assigned "Service Request" as the object, and "Primary Contact" as the attribute. When this SmartText entry is used, the primary contact listed for the service request is automatically substituted for the variable in the text field.

What are the Service Request Details Summary page options?

When you start creating an SR, the Create Service Request page displays three buttons: Save and Continue, Save and Close, and Cancel.

After you enter a title and save the SR, or open an SR for editing, the page also displays the **Actions** menu, and a **Refresh** icon. Click the **Refresh** icon to refresh the Service Request Details Summary page with the latest updates.

The following table lists and describes the available actions in the **Actions** menu.

What would you like to do?	How to do it
Enter simple and consistent resolution information about the SR	Select Resolve .
Assign the SR to yourself	Select Assign to Me .
Make a copy of an existing SR. Note: You can configure the Copy SR action to include the custom fields on the SR object. This enables all non empty custom fields to be automatically populated in the destination SR.	Select Copy .
Delete an SR	Select Delete . This option is available only to administrators. A deleted service request can't be retrieved, and the delete action can't be undone.
Forward an SR to another user of the application	Select Forward .
Assign a queue to the SR	Select Run Queue Assignment .

On the Edit Service Request Summary page, if you click the **Refresh** icon and there are unsaved changes, the **Edit Service Request: Unsaved Changes** dialog box is displayed. It contains the following buttons:

- **Refresh:** Reverts your unsaved changes and keeps you on the Edit Service Request Summary page. Any saved changes that are made by either another user or by a program, will be retained.
- **Cancel:** Persists your unsaved changes and keeps you on the Edit Service Request Summary page.

How do I enable Installed Base Assets for service requests and work orders?

If you use Installed Base Assets for processes such as Supply Chain, Service Logistics, Service Contracts, or IOT, you can opt-in to use the same asset model for SRs and Work Orders. Use Application Composer to add the Installed Base Asset fields to the SR and Work Order pages.

Enable Installed Base Assets

To opt in, do the following:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Change Feature Opt in link
2. Click the **Features** icon for Service in the first row.
3. Select Enable for **Manage Assets Using Common Asset Model**.
4. Click **Done**.
5. Click Done on the Opt In page.

Note: This is a global setting where you choose whether to use Installed Base Assets or the default Asset object for the Service Request and Work Order process. You can't use both asset objects in Fusion Service so you should carefully consider the impact if you have requirements to support asset management outside these processes. For example, Installed Base Asset doesn't currently support sales processes in Fusion Sales and Service and has limited support for extensibility.

How do I configure profile options to display email thread?

When an agent responds to a customer's email from the Messages tab in a service request, it's good to display the email thread. To enable the display of the email thread, you must configure the following profile options.

Profile Option	Description
SVC_EMAIL_ENABLE_PAST_CONVERSATIONS	Indicates whether to display past conversations. To enable past conversations, set the value to Yes. The default value is No, so it's disabled by default.
SVC_EMAIL_NO_OF_PAST_CONVERSATIONS	Indicates the number of past conversations to be included in the email thread. The default value is 1. You can specify a value from 1 to 10. If you set the value to 0, no past conversations are included. And even if you set a value greater than 10, only a maximum of 10 conversations are displayed.
SVC_EMAIL_PAST_CONVERSATION_START_MARKER	Indicates the start marker for each conversation in the email thread. This value is fixed and is displayed in English by default. To translate and display this value in the language of your choice, you must set the required locale in the ORA_SVC_EMAIL_DEFAULT_LANGUAGE profile option.
SVC_EMAIL_PAST_CONVERSATION_END_MARKER	Indicates the end marker for each conversation in the email thread.

Profile Option	Description
	This value is fixed and is displayed in English by default. To translate and display this value in the language of your choice, you must set the required locale in the ORA_SVC_EMAIL_DEFAULT_LANGUAGE profile option.
ORA_SVC_EMAIL_DEFAULT_LANGUAGE	<p>Indicates the default language to format outbound emails and parse inbound emails.</p> <p>The default value is blank. When it's blank, the existing values for the start and end markers are displayed for the past conversations. For details about these markers, see the preceding two rows in this table.</p> <p>You can specify the locale as a value for this profile option. For example: en for English, fr for French, and pt for Portuguese. When you specify the locale, the translated values for the following start and end conversation markers are displayed in the specified language:</p> <ul style="list-style-type: none"> SVC_EMAIL_PAST_CONVERSATION_START_MARKER: [##Send your response as a reply to the above mail##] SVC_EMAIL_PAST_CONVERSATION_END_MARKER: [##End of conversation##]
SVC_EMAIL_PAST_CONVERSATION_MSGTYPES	<p>Indicates the types of messages to include in the email thread. You must specify the codes for the message types, separated by commas.</p> <p>For example: ORA_SVC_INTERNAL_NOTE, ORA_SVC_RESPONSE, ORA_SVC_SYSTEM_NOTE, ORA_SVC_CUSTOMER_ENTRY, ORA_SVC_FORWARD, ORA_SVC_SYSTEM_RESPONSE. You can't specify the meaning or the display name of the message type.</p> <p>The default value is ORA_SVC_CUSTOMER_ENTRY.</p> <p>Note: To add codes for other message types, see the "Search for Lookup Codes of Message Types" section at the end of this topic.</p>
ORA_SVC_EMAIL_PAST_CONVERSATION_SHOW_MSG_TYPES	<p>Indicates whether to include the message type in past conversations.</p> <p>The default value is Y.</p> <p>The message type is translated based on the signed-in user's locale. But the default language might be different. Let's say the signed-in agent's locale is Japanese and the default language is Chinese. So while everything gets translated to Chinese, only the message types appear in Japanese.</p> <p>If your customers contact you about this issue, you can set the value to No. The message type is no longer included in past conversations.</p>
ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS	Indicates whether to enable past conversations by default in outbound messages.
ORA_SVC_EMAIL_PAST_CONVERSATION_CHAN_TYPES	<p>Includes messages from only one or more specific channels in past conversations.</p> <p>Set the value to a comma-separated list of those specific channel types that you want.</p>

To configure the profile options for displaying the email thread:

1. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** field, type **Manage Admin.**

4. From the displayed list of tasks, click **Manage Administrator Profile Values**.
5. In the Manage Administrator Profile Values page, navigate to the **Search: Profile Option** region.
6. In the Profile Option Code field, type %.
7. Select **%PAST_CONVERSATION%** from the options displayed.
8. Click **Search**.

The Search Results: Profile Options region displays the list of profile options related to past conversations.

9. Select the profile options one by one.
10. In the Profile Values region, specify the values in the **Profile Value** column for the **Site** Profile Level as described in the table.
11. Repeat the previous step for each profile option in the search results.
12. Click **Save**.

Search for Lookup Codes of Message Types

Follow these steps to search for the lookup codes of message types that you want to add in the SVC_EMAIL_PAST_CONVERSATION_MSG_TYPES profile option. You can use the same steps to search for the lookup codes of message types available in the Compose menu in the Messages sub tab of an SR.

1. Sign in as an administrator.
2. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
3. Click **Search** from the list of displayed tasks.
4. Search for and select **Manage Standard Lookups**.
5. In the Manage Standard Lookups page, in the **Lookup Type** field, type `ORA_SVC_MESSAGE_TYPE_CD`.
6. Click **Search**.
7. From the **Lookup Code** column in the ORA_SVC_MESSAGE_TYPE_CD: Lookup Codes region of the page, copy the lookup codes that you want to specify in the SVC_EMAIL_PAST_CONVERSATION_MSG_TYPES profile option.

Note:

- The lookup codes ORA_SVC_CHAT_TRANSCRIPT and ORA_SVC_WRAP_UP aren't applicable to emails.
- If you disable any of the following lookup codes, the corresponding message types disappear from the Compose menu on the Messages sub tab of an SR: ORA_SVC_INTERNAL_NOTE, ORA_SVC_RESPONSE, ORA_SVC_CUSTOMER_ENTRY, and ORA_SVC_FORWARD.

What's the service request lifecycle?

Creating or editing an SR includes the following steps. You don't need to do all the steps, and they don't need to be done in the order we're presenting.

- Enter the summary information: View SR details about what the service request is about such as the customer account, primary contacts, SR description, and so on. You can also add tags to the SR. For more information about adding tags, see "Tagging Service Requests".

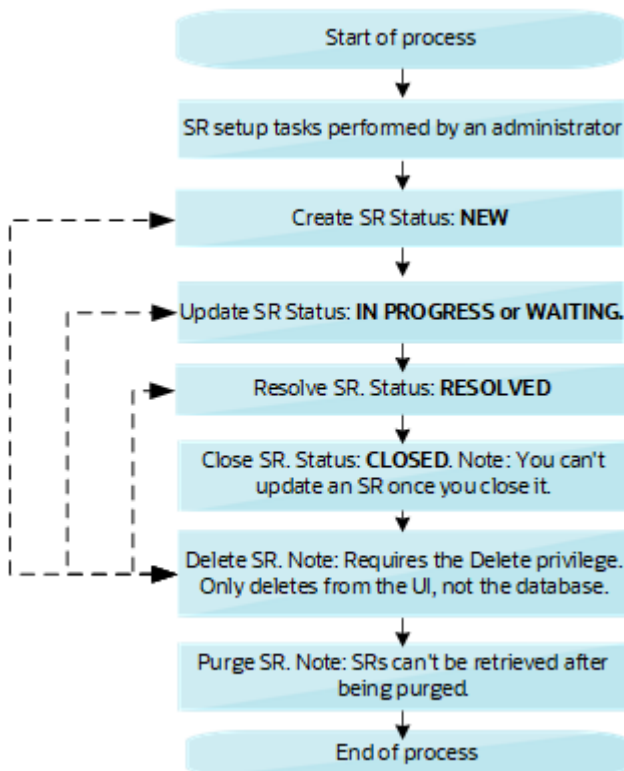
- **View Interaction History:** View details about the various interactions an agent has had for a service request. Get details on who called whom, through what communication channel, what were the top interactions, and with what customer. The view always shows the parent interaction with the associated child interactions (including the cross-channel interactions) in a nested view with the parent interaction. To view the associated interactions, click the + icon next to the parent interaction.
- **Compose messages:** Use the Messages tab to view, create, and send messages and notes on the SR.
- **Add contacts:** Add customer contacts to the SR.
- **Add team members:** Add team members who can view and work on the SR.
- **Create activities:** Create activities such as appointments, tasks, and log calls with the customer.
- **View linked articles:** View related knowledge articles that can help resolve the SR.
- **View Service Request Milestones:** View the service milestones for the SR.
- **Manage Work Orders:** Manage your work orders to ease resolution of the SRs.
- **View Audit History:** View changes to the application data such as the business objects that were created, updated, and deleted

A Typical SR Flow

This flowchart describes the process flow of a Service Request:

An Example of an SR Process

A typical and simple example of an SR Lifecycle flow is given below:



- The agent receives an inbound email from a customer. This creates the SR in "New" status.

Use any of the following methods to create an SR:

- Customer sends email to create the SR. This requires setup by an administrator.
 - Customer creates the SR using Digital Customer Service. Requires setup by an administrator.
 - Agent manually creates the SR by clicking the **Create SR** button.
 - Use other methods such as REST or Import.
- The agent starts working on the SR, and changes the status of the SR to "In Progress".

Use any of the following methods to update the SR:

- Customer sends email to update the SR.
 - Customer updates the SR using Digital Customer Service.
 - Agent manually updates the SR.
 - Use other methods such as REST or Import.
- The agent realizes that they need some extra information from the customer. So they send an email to the customer and flip the SR status to "Waiting".
 - The customer replies back to the email. Currently, the application changes the status back to IN PROGRESS. Here status change isn't ready-to-use, and requires setup in the application.
 - The agent replies back to the customer with the solution and sets the SR status to Resolved.

Use any of the following methods to resolve the SR:

- Automatic Resolve of the SR from Waiting status. Require setup by an administrator.
 - Customer resolves the SR using Digital Customer Service.
 - Agent manually updates the SR.
 - Use other methods such as REST or Import.
- After X days of the SR being resolved, the application flips the status of the SR to Closed, if the customer has configured the ESS job to close SRs.

How do I register or unregister access points for inbound email?

For your inbound emails to be processed successfully, you must register the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option as access points. If your inbound email address changes for some reason, then you must register the new inbound email address as an access point.

Sometimes, you might must unregister a wrong email address that was registered by mistake. The **ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT** profile option controls the ability to unregister access points. Its default value is No. When it's set to the default value, the Unregister button for an access point isn't available. This setting helps to prevent unregistering of access points accidentally. Only when you specifically need to unregister an access point, you can change the value to Yes so that the **Unregister** button is available. After unregistering the access point, you can set the value of this profile option back to No.

CAUTION: When you register or unregister access points, they don't reflect in all the server instances, and some inbound emails might not be received. To prevent this from happening, you can do one of the following:

- Restart the servers to reflect the registering or unregistering of access points. You must contact Oracle Support for restarting the servers.
- Configure the **Retrieve Inbound E-mail Messages** job to run at a suitable frequency. See *How do I configure a job to process inbound emails?*

To register the access points for inbound email:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Communication Channels
 - Task: Manage Email Configuration, Registration, and Validation
2. On the Inbound Email Configuration and Validation page, in the Email Configuration region, click **Validate**.

The access point setup is validated in this region.

The following email addresses are displayed in the **Access Point Value** column of the Access Point Setup region:

- Email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option.
Suppose one or more of these email addresses aren't registered as an access point with the UMS. In such cases, a **Register** button appears in the **Action** column for these email addresses.
- Email addresses that are registered as access points in the UMS.

All email addresses that are registered as access points with the UMS are displayed in this section. An **Unregister** button appears in the **Action** column for each email address.

Note: Don't click **Register** and **Unregister** at this stage. You must complete the remaining steps.

3. Verify whether the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option are correct.
4. If the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option aren't correct, update them to show the correct values.
5. Refresh the Inbound Email Validation and Configuration page.
6. If you still see a **Register** button, click the button to register the email address with the UMS.
7. If you still see an **Unregister** button, click the button, because the email address is wrong.

The wrong email address is unregistered, and is no longer an access point with the UMS.

Note:

- When you unregister an email address, all inbound emails to that email address are lost.
- If the **Unregister** button appears grayed out and you can't click it, set the ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT profile option to Yes as explained earlier in this topic. Now you can click the **Unregister** button.

Add Visual Builder roles

You must add roles in Oracle Visual Builder and Oracle Visual Builder Studio to configure appropriate authorization for your Oracle Visual Builder platform and editor.

Instead of assigning roles to each user individually, you can simplify the process by creating groups and adding users to groups as a way to assign roles. Each time you add a user to a group, the user automatically gets the roles defined for the group. Or you can assign individual users to the Visual Builder roles.

Add Users to a Group

Add users to a group so that they automatically get the permissions defined for the group.

1. Sign in to Oracle Identity Cloud Service Console as an administrator.
2. From the Oracle Identity Cloud Service console, click the **Navigation menu** icon.
3. Click the **Groups** tab.
4. On the Groups page, click the group that you want to assign users to or add a new group.
5. On the Group Details page, select the **Users** tab.
6. Click **+ Assign**.
7. Select the users you want to add to the group, then click **OK**.
The selected users are added to the group. You can now assign roles to all the users in the group, if required.

Assign Users or Groups to Roles in Visual Builder

After you create groups and add users to groups, you can assign roles and provide access to services and instances to all the members of the group at once.

Assign Roles to Users in Visual Builder

1. In Identity Cloud Service, click the **Navigation Drawer**, and select **Oracle Cloud Services**.
2. Select your Visual Builder instance.
You can use the filter to help you find your instance. For Oracle Visual Builder Studio instances search for `visualbuilder`.
3. Click the **Application Roles** tab.
4. Click the menu options icon shown next to the role, and select **Assign Users**. To assign the role to a group, you need to select **Assign Groups**.
5. Assign the Oracle Visual Builder **Service Developer** role to the group or users that require Build and Maintain access in the Oracle Digital Customer Service applications.
6. Assign the Oracle Visual Builder **Service Administrator** role to the group or users that require Administrative access to configure instance-wide settings for the Oracle Visual Builder environment for all applications.

Assign Roles to Users in Visual Builder Studio

Note: The following VB Studio steps apply only to one pod, typically your TEST instance. VBCS, however, is provisioned on all pods so those steps for the application roles are applicable to all instances.

1. Sign in to Identity Cloud Service, click the **Navigation Drawer**, and select **Oracle Cloud Services**.

2. From the Oracle Cloud console dashboard, navigate to the Identity Cloud console and click **Applications**.
3. Click the link for your Oracle Visual Builder Studio instance.
You can use the filter to help you find your instance. For Oracle Visual Builder Studio instances search for your instance prefixed with "VBINST".
4. Click the **Application Roles** tab.
5. Click the menu options icon shown next to the role, and select **Assign Users**. To assign the role to a group, you need to select **Assign Groups**.
6. Select the check box next to the name of each user that you want to add to the role, and then click **Assign**.

Note: You must add the DEVELOPER_USER or the DEVELOPER_ADMINISTRATOR user roles.

How do I set the From Name in outbound emails?

When you send emails to your customers, the **From Name** in the outbound email is typically the channel name. But you have the option to set the resource name as the **From Name** in outbound emails.

You can do this by configuring the **ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND** profile option.

To set the service agent's name as the From name in emails sent to your customers:

1. Ensure that you've configured the SPF policy to enable outbound email so that your emails aren't rejected by your customer's mail server.
2. Sign in as a setup user or administrator.
3. Navigate to the **Setup and Maintenance** work area and open the **Tasks** panel tab.
4. Click **Search** from the list of displayed tasks.
5. Search for and click **Manage Administrator Profile Values**.
6. On the Manage Administrator Profile Values page, navigate to the Search region.
7. In the **Profile Option Code** field, type `ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND`.
8. Click **Search**.
The `ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND` profile option is displayed in the Search Results: Profile Options region.
9. In the Profile Option Levels region, set the **Profile Value** for the Site **Profile Level** as **Yes**.
10. Click **Save and Close**.

What are the SmartText naming conventions?

The following restrictions on special characters are applicable when you create a Public or Private SmartText:

- You can't include the following Trigger keys such as # and @ in the name, as these might cause interaction problems.
- The following special characters aren't allowed:
 - Tilde
 - Number sign
 - Percent

- Ampersand
- Asterisk
- Flower Bracket
- Backslash
- Colon
- Angle Bracket
- Slash
- Plus sign
- Question mark
- Pipe
- Quotation mark
- Double Square Bracket
- You can't use the following special characters:
 - Exclamation mark
 - Pound
 - Dollar
 - Round Bracket
 - Euro
 - Caret
 - Underscore
 - Equal to
 - Semi-colon
 - Comma
 - Dot

How do I create a service mapping?

Here's how you create a service mapping:

1. On the Subscription Configuration page, click **Dynamic Matrix Configuration > Manage Service Mappings**.
The Manage Service Mappings page is displayed.
2. Click **Subscription Entitlements**.
The Edit Service Mapping: Subscription Entitlements page is displayed.
Note: If you're using Service Contracts, then you navigate to this page by clicking **Navigator > Contract Management > Contracts > Tasks > Manage Service Mappings > Contracts Service Entitlements**.
3. On the **Entities** tab, select .

4. In the **ServiceRequest: Details** section, click **Add Row** to add your attribute and select the details, for the mapping.
Note:
 - All attribute names must have the suffix **_Custom**.
 - Ensure that **Write** is disabled for the selected attribute.
5. Click **Save**.
6. Click the **Sources** tab (on the same page, Edit Service Mapping: Subscription Entitlements).
7. In **Source**, select .
8. Select **ServiceRequest** in the tab.
9. On the **Entitlement: Details > Attribute Mappings** tab, click **Add Row** to create the mapping for the new attribute.
10. Select the attribute that you created in step 4 from the **Attribute** drop-down list and enter the related **View Object Attribute** of the .
Note: Ensure that **Write** is disabled for the selected attribute.
11. Click **Save**.
12. Click the **Services** tab (on the same page, Edit Service Mapping: Subscription Entitlements).
13. Select **ServiceRequest** in the **GetSubscriptionEntitlements: Details > Entities** tab.
14. In the **ServiceRequest: Entities** section, click **Add Row** to create the mapping for the new attribute.
15. Select the attribute that you added in Step 4 from the **Attribute** drop-down list and enter the values.
Note: Ensure that **Write** is disabled for the selected attribute.
16. Click **Save and Close**.

How do I enable subscription coverages for entitlements?

Oracle recommends using subscription coverages. New customers are automatically opted-in to Subscription Management instead of Service Contracts. Existing customers who are implementing service entitlements should consider subscription coverages.

The **Manage Service Entitlements Using Subscription Coverages** feature is enabled by default for new instances. If this feature is enabled, the application uses Oracle Subscription Management Cloud to define entitlement calendars, coverages, and associated setup, and uses this setup at runtime to identify service request milestones.

Here's how you can enable this feature:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
2. Click **Change Feature Opt In**.
Select the **Enable** check box in the Service Entitlements row.
3. Click **Done**.

How can I be notified when a customer replies to a message?

Here's a sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when a customer replies to a message.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Message > Server Scripts.

```
/* DISCLAIMER: This trigger is provided only as a reference.
 * TRIGGER TYPE: Before Insert to Database
 * OBJECT: Message (child of Service Request)
 * Use Case: Send a notification to the assignee when a customer entry is created.
 * Note: You can override the Notification Text and Recipients using the Notification Preferences page.
 */
if (MessageTypeCd == 'ORA_SVC_CUSTOMER_ENTRY') {
  try {

    // Note: The notation ServiceRequest?.SrNumber is used because ServiceRequest is the parent
    // object of Messages. To access the other possible field names, expand the trigger box, click on fx,
    // click on Fields, and select the drop-down list from Message. Click on Service Request to see the
    // available fields. You must click Insert to correctly insert the appropriate field into your script.

    def messageText = "A customer entry was received for " + ServiceRequest?.SrNumber
    def recipientPartyId = ServiceRequest?.AssigneeResourceId
    if (recipientPartyId) {
      // Call to send notification
      adf.util.sendNotification(adf, messageText, recipientPartyId)
      //Log a confirmation that the notification has been sent. Logs can be viewed in 'Runtime Messages'.
      //println("Notification sent to " + recipientPartyId + " because a customer entry was received.")
    } else {
      println("No Assignee associated with this SR")
    }
  } catch (e) {

    // Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'.
    println("Failure to trigger notification from Groovy Script " + e.getMessage());

    // Throwing validation exception will show the message on the UI. This is not recommended for published
    // sandboxes.
    // The following code is one of many to illustrate identifying an error in trigger from UI.
    // Replace <triggerName> with the trigger name you specified when creating this trigger.
    // throw new oracle.jbo.ValidationException('Failure to trigger <triggerName> Notification from Groovy
    // Script: ' + e.getMessage())
  }
}
```

How do I use Groovy script to notify an agent that a service request has been assigned?

Here's a sample groovy script that triggers a notification to be sent to the recipient specified in the Notification Preferences page when a service request (SR) is assigned.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Server Scripts.

```
/* DISCLAIMER: This trigger is provided only as a reference.
 * TRIGGER TYPE: Before Update in Database
 * OBJECT: Service Request
 * Use Case: Send a notification when an existing SR is reassigned.
 * Note: You can override the Notification Text and Recipients using the Notification Preferences page.
 */

if (isAttributeChanged('AssigneeResourceId')) {
  try {
    def recipientPartyId = AssigneeResourceId
    def messageText = 'An SR notification (default message).'

    if (recipientPartyId) {
      //Call to send notification
      adf.util.sendNotification(adf, messageText, recipientPartyId)

      //Log a confirmation that the notification has been sent. Logs can be viewed in 'Runtime Messages'.
      //println("Notification sent to " + recipientPartyId + " because the SR was assigned to them.")
    } else {
      println("No Assignee associated with this SR")
    }
  } catch (e) {
    //Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'.
    println("Failure to trigger notification from Groovy Script " + e.getMessage());
    // Throwing validation exception will show the message on the UI. This is not recommended for published sandboxes.
    // The following code is one of many to illustrate identifying an error in trigger from the UI.
    // Replace <triggerName> with the trigger name you specified when creating this trigger.
    // throw new oracle.jbo.ValidationException('Failure to trigger <triggerName> Notification from Groovy Script: ' + e.getMessage())
  }
}
```

What are the predefined knowledge roles?

You can use built-in, out of the box, default knowledge roles available in Knowledge to set up and manage knowledge users such as agents, managers, and authors. Most organizations use the predefined roles as the basis for defining new roles to meet their specific needs. You can copy, edit, and save your own roles to assign to users so that they have the right privileges and policies for your organization. You can also create entirely new roles if there are no suitable predefined roles to copy and edit.

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

Fusion Service Knowledge Access Roles

Use these predefined roles as starting points to set up users to access knowledge in a Fusion Service application:

- Agents who use knowledge to help resolve customer issues.
- Managers who supervise agents and manage knowledge activities.
- Internal users who use My Knowledge

- External web users who use public knowledge in Digital Customer Service and in user-defined pages and portals.

Role	Access Locations	User Groups	Application Content
Customer Service Representative	<ul style="list-style-type: none"> • My Knowledge • Knowledge in SRs 	<ul style="list-style-type: none"> • Internal Service • Everyone 	Fusion Service
Customer Service Manager	<ul style="list-style-type: none"> • My Knowledge • Knowledge in SRs 	<ul style="list-style-type: none"> • Internal Service • Everyone 	Fusion Service
Customer Self Service User	<ul style="list-style-type: none"> • Public web channels 	<ul style="list-style-type: none"> • Everyone 	Fusion Service

Fusion Service Knowledge Authoring Role

Use this predefined role as a starting point to set up knowledge authors who contribute content to a Fusion Service knowledge base.

Note: There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Author - Service	Authoring	<ul style="list-style-type: none"> • Internal Service • Everyone 	Fusion Service

HCM Knowledge Access Roles

Use these predefined roles as starting points to set up knowledge users in an HCM HR Help Desk application.

- Managers who manage knowledge activities.
- Internal users who use My Knowledge

Role	Access Locations	User Groups	Application Content
Human Resource Help Desk Manager	<ul style="list-style-type: none"> • Authoring • My Knowledge • Knowledge in HCM service requests 	<ul style="list-style-type: none"> • Everyone • Employee • Internal HCM 	HCM
Knowledge Search - HCM	<ul style="list-style-type: none"> • My Knowledge 	<ul style="list-style-type: none"> • Internal HCM 	HCM

HCM HR Help Desk Knowledge Authoring Role

Use this predefined role as a starting point to set up knowledge authors who will contribute content to an HCM knowledge base.

Note: There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Author - HCM	Authoring	<ul style="list-style-type: none"> Everyone Employee Internal HCM 	HCM
Human Resource Help Desk Manager	<ul style="list-style-type: none"> Authoring My Knowledge Knowledge in HCM service requests 	<ul style="list-style-type: none"> Everyone Employee Internal HCM 	HCM

General Knowledge Role

Use this predefined role as a starting point to set up knowledge managers who administer the knowledge base and knowledge analytics for Fusion Service and HCM knowledge applications.

Note: There are additional requirements for setting up knowledge authors that we cover later in this chapter.

Role	Access Locations	User Groups	Application Content
Knowledge Manager	<ul style="list-style-type: none"> My Knowledge Authoring Knowledge analytics Knowledge setup and maintenance tasks User management Public and internal articles 	<ul style="list-style-type: none"> Internal Service Internal HCM Employee Everyone 	HCM and Fusion Service

Note: There is also a Knowledge Analyst role that should not be used in new implementations. It is maintained for compatibility reasons only.

Can I view an expired milestone sample script?

This is sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when a milestone expires.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Milestone > Server Scripts.

Note: This example uses `warnedFlag`. However, you can also use `complianceFlag` for similar results.

```
/* DISCLAIMER: This trigger is provided only as a reference.
 * TRIGGER TYPE: Before Update in Database
 * OBJECT: Milestone (child of Service Request)
 * Use Case: Send a notification to the assignee when an SR milestone is expiring.
 * Note: You can override the Notification Text and Recipients using the Notification Preferences page.
 */

if (isAttributeChanged('WarnedFlag') && WarnedFlag=='Y') {
  try {
    def recipientPartyId = SrAssigneePartyId
    def messageText = 'An SR milestone notification (default message).'
```

How do I assign a service request to an agent's queue?

Here are the various ways in which you can assign a service request (SR) to a queue:

- Open an SR. From the **Queue** drop-down list, manually select the queue to which you want to assign the SR.
- Enable Omnichannel, which runs the queue assignment rules when the SR is created or when the queue is deleted from the SR.
- Click **Run Queue Assignment** from the **Actions** menu, which runs the queue assignment rules.

- Enable the Assign Service Request to Queue on Create profile option, which runs the queue assignment rules when the SR is created. The process is described below.
- Schedule the Queue Assignment job that runs the queue assignment periodically and processes all the open SRs that aren't assigned to a queue.

The preferred way of assigning an SR to a queue is by using Omnichannel assignment. Enabling Omnichannel has the following advantages:

- Enabling Omnichannel provides more features than queue assignment. It also enables the automatic assignment of agents. But if your business only requires queue assignment, you must carefully evaluate whether you need to enable Omnichannel.
- Only if you enable Omnichannel, the SR is assigned to the Default queue when the Assignment Manager rules haven't been defined or when the selected SR doesn't satisfy any active rule.
- When Omnichannel is enabled, automatic assignment of SRs to agents is always enabled on the Default queue.

Suppose you're assigning SRs to an automatic queue either manually or automatically by using assignment rules or groovy scripts. If you enable Omnichannel, Oracle recommends that you also assign active agents for the automatic queue, so that SRs can be assigned to the agents.

Note: If you don't assign agents for the automatic queues, SRs assigned to those queues could grow exponentially over time. And this causes the application to slow down.

Enable the Assign Service Request To Queue On Create Profile Option to Assign an SR to a Queue

Here's how you enable the Assign Service Request To Queue On Create profile option:

1. Sign in to the application as an administrator.
2. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Service Request
 - Task: Manage Service Request Profile Options

Note: Or, you can open the Tasks panel tab and search for the **Manage Service Request Profile Options** task.

3. On the Manage Service Request Profile Options page, click **SVC_ASSIGN_TO_QUEUE_ON_CREATE**.
4. Navigate to the SVC_ASSIGN_TO_QUEUE_ON_CREATE: Profile Values region of the page.
5. In the **Profile Value** drop-down list for the Site **Profile Level**, select **Yes**.
6. Click **Save and Close**.

Note: If Omnichannel is enabled, this profile option is ignored.

How do I set agent capacity?

Capacity indicates the maximum number of open work items of a certain type that an agent can handle. Capacity is configured at a global level for various types of work items by using the Manage Capacities page.

Capacity is calculated separately for real-time work items such as SRs. For example: If the global capacity for open SRs is 30, an agent who's working on 30 open requests is considered to be 100 percent occupied.

If an agent who's accepting chat offers changes their presence state from present or available to busy, then the agent's chat availability status is automatically changed to unavailable, and no chats will be sent to that agent. For non real-time work, agents can remain available, though. For instance, an agent might go to lunch and change presence state to busy which prevents real-time work offers, but the agent could still get non real-time work assigned (assuming the agent has capacity).

If a queue has multiple agents, the work item is assigned to the agent with the maximum free capacity of the relevant type. If more than one agent has the same capacity, the work item is assigned to the agent with the maximum overall free capacity. .

How can I be notified when a customer replies to a message?

Here's a sample code to trigger a notification to be sent to the recipient specified in the Notification Preferences page when a customer replies to a message.

You can copy and paste this sample code in Application Composer > Objects > Standard Objects > Service Request > Message > Server Scripts.

```
/* DISCLAIMER: This trigger is provided only as a reference.
 * TRIGGER TYPE: Before Insert to Database
 * OBJECT: Message (child of Service Request)
 * Use Case: Send a notification to the assignee when a customer entry is created.
 * Note: You can override the Notification Text and Recipients using the Notification Preferences page.
 */
if (MessageTypeCd == 'ORA_SVC_CUSTOMER_ENTRY') {
  try {

    // Note: The notation ServiceRequest?.SrNumber is used because ServiceRequest is the parent
    // object of Messages. To access the other possible field names, expand the trigger box, click on fx,
    // click on Fields, and select the drop-down list from Message. Click on Service Request to see the
    // available fields. You must click Insert to correctly insert the appropriate field into your script.

    def messageText = "A customer entry was received for " + ServiceRequest?.SrNumber
    def recipientPartyId = ServiceRequest?.AssigneeResourceId
    if (recipientPartyId) {
      // Call to send notification
      adf.util.sendNotification(adf, messageText, recipientPartyId)
      //Log a confirmation that the notification has been sent. Logs can be viewed in 'Runtime Messages'.
      //println("Notification sent to " + recipientPartyId + " because a customer entry was received.")
    } else {
      println("No Assignee associated with this SR")
    }
  } catch (e) {
```

```
// Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'.
println("Failure to trigger notification from Groovy Script " + e.getMessage());

// Throwing validation exception will show the message on the UI. This is not recommended for published
sandboxes.
// The following code is one of many to illustrate identifying an error in trigger from UI.
// Replace <triggerName> with the trigger name you specified when creating this trigger.
// throw new oracle.jbo.ValidationException('Failure to trigger <triggerName> Notification from Groovy
Script: ' + e.getMessage())
}
}
```

How do I manage assignment objects?

You need to select attributes from the service request (SR) assignment object that you want to make available in your rules. But note that this procedure is optional, because ready-to-use fields are already provided for all the objects.

Note: You must not change the configuration for any of the ready-to-use objects. If you change the configuration, the Service Request Queue Assignment process can't run successfully. But you can add new attributes or new child entities for the objects.

(Optional) To manage SR assignment objects:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Communication Channels
 - o Task: Manage Service Assignment Objects
2. On the Manage Service Assignment Objects page, add the queue attributes that you want to be available when you're setting up your rules:
 - a. Click **Queue**.
 - b. Click the **Attributes** tab.
 - c. Add attributes to the list by clicking the **Plus** icon, and then selecting the **View Object Attribute** from the drop-down list.
 - d. Click **Save**.
3. Add the service request attributes that you want to be available when setting up your rules:
 - a. Click **Service Request**.
 - b. Click the **Attributes** tab.
 - c. Add attributes to the list by clicking the **Plus** icon, and then selecting the **View Object Attribute** from the drop-down list.
 - d. Click **Save**.

How do I manage assignment rules?

Let's go over how you define the rules for service assignment.

Here are some guidelines that you need to follow when you're defining matching rules for assigning work items to queues:

- You must define the rule set with Number of Candidates = 1. The application enables only one queue to be assigned to a service request (SR).
- You've the option to select or deselect the Use Score option on a rule set. If you select Use Score, then for every rule in the rule set, you must indicate the amount to increase the score when the rule is true. You must then associate the rule set to queues that receive that score. All the rules in a rule set are executed, and the queue with the highest total score is selected.
- If the rule set has multiple rules and you didn't select the Use Score option, you must define the criteria for each rule to be mutually exclusive from other rules in the rule set. This ensures that the resulting queue assigned by the application is predictable in all situations.

You can use the operators listed in this table to define the conditions for SR assignment rules.

Operator	Description	Value	Used in hierarchy?	Example
Equals	The value of a field equals a specific value.	Single	No	If the rule condition is set as <i>Service Request Severity Equals High</i> , only an SR with the severity value of High matches the condition.
Does not equal	The value of a field doesn't equal a specific value.	Single	No	If the rule condition is set as <i>Service Request Severity Does not equal High</i> , an SR with severity value of Low or Medium matches the condition.
In	The value of a field is one of a list of values.	Single or Multiple	No	If the rule condition is set as <i>Service Request Problem type Code In Docs, Product</i> , an SR with the problem type code value of Docs or Product matches the condition.
In including children	The value of a field is one of a list of values. Indicates that the rule applies if an attribute value matches to any of the attributes in the parent-child hierarchy of the current attribute.	Single or Multiple	Yes	If the rule condition is set as <i>Service Request Product Group In including children Apple</i> , any SR with the Apple product group or any of its children, such as iPhone, iPhone 6s, iPhone 7, iPad, iPad1, and iPad 2 match the condition.

Operator	Description	Value	Used in hierarchy?	Example
Not in including children	The value of a field isn't in a list of values. This value is only relevant for category or product fields that are hierarchical. Indicates that the rule applies if the specified attribute value matches the top level of the attribute. This option doesn't include the attribute values of the children of the current attribute.	Single or Multiple	Yes	If the rule condition is set as <i>Service Request Product Group Not in including children iPad</i> , an SR with the Product Group value of iPad or any of its children, such as iPad1 or iPad2 doesn't match the condition. However, an SR with the Product Group value of Apple, iPhone, or iPhone 6s matches the condition.
Not in	The value of a field isn't in a list of values.	Single or Multiple	No	If the rule condition is set as <i>Service Request Problem Type Code Not in Docs, Product</i> , an SR with the problem type code value of User doesn't match the condition. However, an SR with a problem type code of Docs or Product is a match.
Is blank	The value of a field doesn't contain a value.	N/A	No	If the rule condition is set as a <i>Service Request Internal Priority Code Is blank</i> , an SR without an internal priority code value is a match.
Is not blank	The value of a field contains any value.	N/A	No	If the rule condition is set as <i>Service Request Account Is not blank</i> , an SR with an associated account is match, but not an SR without an account.

To manage SR assignment rules:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Communication Channels
 - o Task: Manage Service Assignment Rules
2. On the Manage Service Assignment Rules page, select a **Category** based on the following.
 - o **Generic Queuing Rules:** Rules set for all types of work items.
 - o **HR Service Request Queuing Rules:** Rules set for HR Help Desk SR.
 - o **Service Request Queuing Rules:** Rules set for CRM SR.
3. Create a new rule set by clicking the **Plus** icon in the **Rule Sets** work area, and then enter the required information.

4. Create rules for the rule set by clicking the **Plus** icon in the **Rules** work area.
5. In the **Create Rule** window, enter a name for the rule in the **Name** field.
6. From the **Rule Applies If** drop-down list, select **Any conditions met**.
7. Add a condition by clicking the **Plus** icon in the **Conditions** work area, and then define the required attribute.
If an attribute is hierarchical, such as Category Name and Product Group, **Not In Including Children** and **In Including Children** operators are displayed as choices. For more information about the operators, see the table with the list of operators.
8. (Optional) Add more conditions.
9. In the Action: Assign Queue region, click the **Plus** icon to select a queue.
10. In the **Select and Add Queue** window, search for and select a queue.
11. Click **OK**.
12. Click **Save and Publish** to publish the assignment rules.

The service assignment has been defined.

Note: You must republish the assignment rules each time the rule is changed. Also republish the rules each time the associated queue is deleted, enabled, or disabled.

How do I enable deep links to KM articles in outbound emails?

When your service agents reply to customers by email, they might sometimes need to add links to Knowledge Management (KM) articles or other related service requests (SRs). These articles can help resolve the issue faced by the customers in that SR, or they can provide more information.

These internal links to KM articles work in the SR Messages tab. But for these internal links to work in emails sent to customers, they must be translated to external links that open on the customer service application.

Your customers typically have access to one or more customer service applications. These customer service applications provide them access to their SRs and relevant knowledge articles through a web interface. They might use multiple customer service applications for various reasons. For example, customers often use different customer service applications for different business units (BUs).

Here's what you need to do to convert the internal links to external links that open in the customer service application:

- Enable the SVC_ENABLE_DEEPLINKS_IN_OUTBOUND_EMAIL profile option.
- Use the Manage Service Request Dynamic Links task to configure the **External URL** field, as described in the following table.

This table shows how the links work, depending on how the agent links to the article.

Type of link created to the KM article	What to append to the external URL to make the link work	How the link works
Article link format: When the agent uses either the "Insert as link" in RHP or the "Insert Knowledge" button KM application.	? kmContentId={0} &page=shell&shell=know article	The parameter {0} is replaced by the internal document ID of the selected KM article, and a clickable link to the article is inserted in the email message. The title of the KM article is used as the label for the link.

Type of link created to the KM article	What to append to the external URL to make the link work	How the link works
		The article opens in the customer service application in a separate nested tab.
<p>Knowledge article format:</p> <p>When the agent composes a message and provides a reference to a KM article. For example, if the agent types in the text FAQ1234, this text is linked in the email message.</p>	<p>?</p> <p><code>kmExternalId={0}&page=shell&shell=knowledge-article</code></p>	<p>The parameter {0} is replaced by the internal document ID of the selected KM article. The article is linked by using the typed text as the label for the link. Example of typed text: FAQ1234.</p> <p>The article opens in the customer service application in a separate nested tab.</p>

Note: The deep links don't work if they contain the # character. Also, special characters such as @, ^, and * can be used only if preceded with the backslash character \. For example, you must use * instead of * in your regular expression. For more information about using special characters in regular expressions, see the open source documentation for regular expressions. After you change the regular expression, remember to use a validator to ensure that it's still working.

To enable deep links to KM articles in outbound emails and email previews to open in the customer service application:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Productivity Tools
 - o Task: Manage Service Request Dynamic Links

Note: Optionally, you can search for the Manage Service Request Dynamic Links task from the Tasks panel tab in the Setup and Maintenance work area.

2. On the Manage Dynamic Links page, repeat steps 3 to 12 for each of the business units (BUs) for your deployment.

That's because you might have different customer service applications for different BUs. If you only have a single BU, you need to do the steps only once.
3. Select the row that has **ARTICLE_LINK** in the **Object Type** field.
4. Click **Add** to add a row.
5. From the **Business Unit Name** drop-down list, select a BU.
6. In the **External URL** field, do the following:
 - a. Enter the external URL provided to you.
 - b. Append the following string at the end, after the slash: `?kmContentId={0}&page=shell&shell=knowledge-article`

This string is explained in the first row of the table.

Example of how the final URL looks: `https://myvbinstance.builder.ocp.oc.com/ic/builder/rt/KMEXTID297/1.0/webApps/dcs/?kmContentId={0}&page=shell&shell=knowledge-article`
7. Click **Save**.
8. Select the row that has **KNOWLEDGE_ARTICLE** in the **Object Type** field.

9. Click **Add** to add a row.
10. From the **Business Unit Name** drop-down list, select the same BU as in step 5.
11. In the **External URL** field, do the following:
 - a. Enter the external URL provided to you.
 - b. Append the following string at the end, after the slash: `?kmExternalId={0}&page=shell&shell=knowledge-article`

This string is explained in the second row of the table.

Example of how the final URL looks: `https://myvbinstance.builder.ocp.oc.com/ic/builder/rt/KMEXTID297/1.0/webApps/dcs/?kmExternalId={0}&page=shell&shell=knowledge-article`
12. Click **Save**.

Add Deep Links to Third Party Applications from Service Request Messages

You can add custom object types and provide dynamic links to third party applications within the service request message content. The user can drill down directly from dynamic links in a service request message into specific records in non Fusion applications.

You can define regular expression patterns that convert to a URL link, when the user types text matching that pattern. For example, when a user types text matching the pattern for a service request reference, the text in the SR message is automatically converted into a link to that SR. This means that a user can, for example, type in `FAQ123`, `SR123`, or `Bug123`, and if the pattern matches, it creates a link in the SR message, to the corresponding FAQ knowledge article, SR, or bug tracking application.

Here's how you configure the third party link for custom objects:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Productivity Tools
 - o Task: Manage Service Request Dynamic Links
2. On the Manage Dynamic Links page, click **Add**.

The **Add** dialog box is displayed.
3. In the **Object Type** field, enter a name for the custom object (for the third party application) you want to create.
4. To automatically generate dynamic link patterns for links that point to the third party application, select the **Generate pattern** check box.

Use this option in case you aren't sure how to reference an object. You can't edit this pattern.
5. Click **OK**.
6. Select the custom object row you added, and click **Add**.
7. From the **Business Unit Name** drop-down list, select a BU.
8. In the **External URL** field, enter the URL that's needed to deep link on the selected custom object.

The external URL should also contain `{1}`, which is the parameter that's replaced with the text or number adhering to the pattern.

For example, if you add a pattern such as `(?i)\b(txt) ([0-9]{3})\b` that opens in a URL such as `https://abc.com/edit_info?rpt=txt123`,

then the external URL should be `https://abc.com/edit_info?rpt=`{1}

9. In the **Internal URL** field, enter the internal URL for the third party application (for the selected custom object).
10. Click **Save**.

Note: To delete a custom object type, click **Delete** (the X icon) for the corresponding row. You can't delete the ready to use object types such as service request, article link, and knowledge article.

Here's some more examples that show how to configure other deep links:

- SRs:
 - Pattern: `(?i)\b(SR) ([0-9]{10})\b`
 - External URL: `https://<fusion application URL>/deeplink?objType=SVC_SERVICE_REQUEST&objKey=srNumber%3D{0}&action=EDIT_IN_TAB`
 - Internal URL: Not applicable
- HR Help Desk articles:
 - Knowledge_Article (for example, HFAQ123): `https://<fusion application URL>/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3D{0}%3Blocale%3D{1}&action=EDIT_IN_TAB`
 - Article_Link (for example, HFAQ123): `https://<fusion application URL>/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=articleId%3D{0}%3Blocale%3D{1}&action=EDIT_IN_TAB`

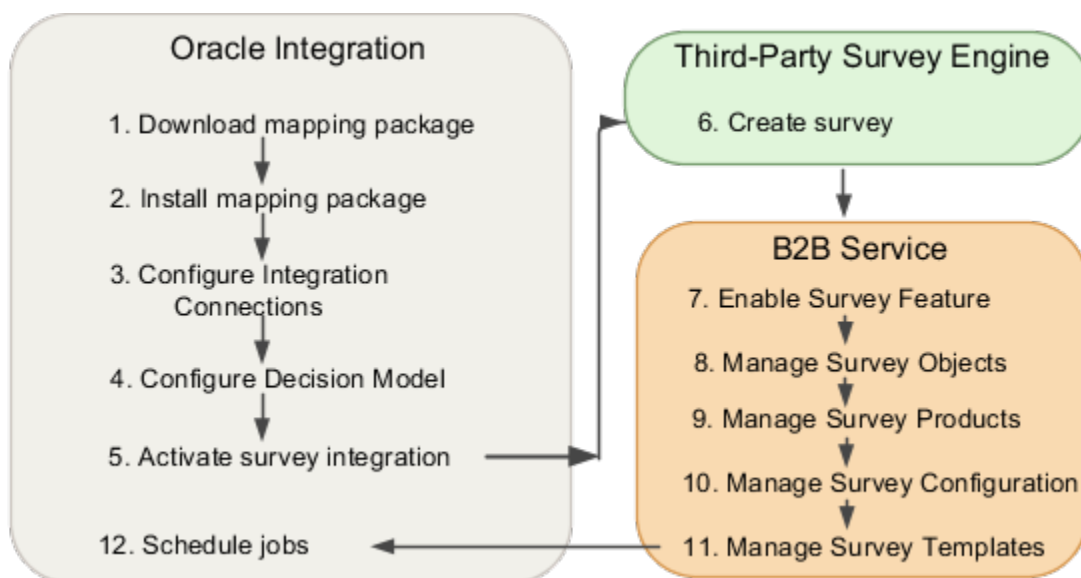
Can I use surveys?

The survey integration framework lets you start survey requests based on any object.

You can send surveys from your preferred third-party supplier to your customers based on your chosen rules. You can define who receives a survey, what survey should be sent, and when to send a survey.

The survey integration framework connects with your survey supplier using Oracle Integration Enterprise Edition.

The following graphic shows the set up steps you'll need to perform to integrate the survey framework..



What happens to closed service requests?

Service requests (SRs) can be closed only by an internal process. You can't manually set the status of an SR to Closed.

Note: If you want any SRs to be closed automatically, you must contact your administrator.

After an SR is closed, you can't edit the SR, add a message, or reopen it.

How do I implement user groups in Knowledge?

You can use both predefined user groups and custom user groups that you create. In either case, you need to understand and set up the following to make effective use of user groups in Knowledge.

Note: This answer is applicable to both Fusion Service Knowledge Management with Redwood and Classic User Experience.

In security model terms, a user group is like a privilege, which you define in a data security policy (DSP) within a role. You add users to user groups by assigning them to roles that contain user group data security policies. We recommend that you create new roles when you set up user groups.

User groups are also specific to a department, or application. When you create a role to grant access to a user group, make sure that it also grants access to the department, or application, that the group belongs to.

Here are the basic tasks to set up a user group:

- Create a new role. You can create a new role or copy an existing role and modify it to your needs.
- Add a department data security policy. You can add one or more department DSPs based on your access requirements.
- Add a user group data security policy. You can add one or more user group DSPs based on your access requirements.
- Assign the role to users. You can assign the role to individual employees or groups of employees and set up autoprovisioning to automatically assign the role to new employees, as necessary.

Note: When creating an article, the author must add at least one user group to the article. If you use a REST API to create or update an article without a user group, the application automatically assigns the Everyone user group. If you add the Everyone user group to an article, you cannot add any other group.

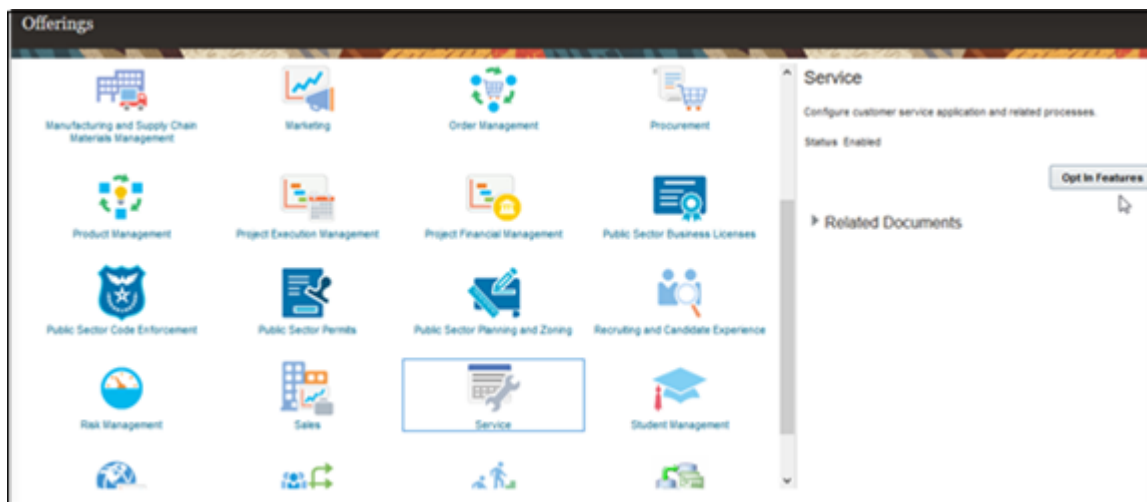
How do I enable Service Center?

To enable Service Center functionality and user interface, you just need to opt-in from Fusion Service.

Note: Once you opt in to the Redwood User Interface for Service feature to enable the Redwood UI make sure to then click the pencil icon to ensure that the Service Center sub features are also enabled. There are two sub features to review are Service Requests for Redwood User Interface and Work Orders for Redwood User Interface. These separate sub features allow the administrator to control whether each set of object-related pages should be enabled in Redwood.

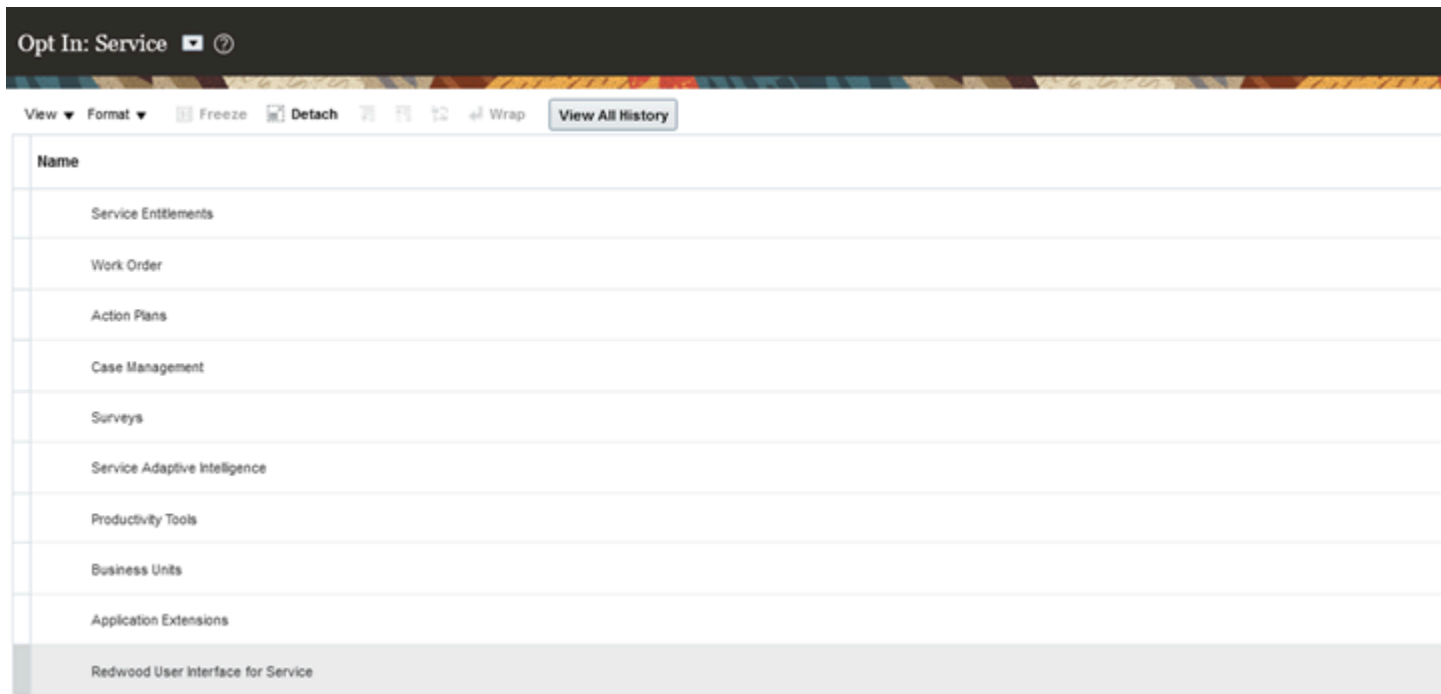
Here are the steps:

1. Sign in to the application as an administrator or setup user.
2. Click **Navigator > My Enterprise > Offerings**.



3. On the Offerings page, select the **Service** offering.
4. Click the **Opt In Features** button.
5. On the **Opt In: Service** page, review the functional areas, such as Service Requests, Channel Communication and so on.

6. Scroll through the list until you locate **Redwood User Interface for Service**.



7. Select **Enable**.
8. Click the **Features** (pencil) icon.
9. On the Edit Features: Redwood User Interface for Service page, enable all child features.
10. Click **Done**, and then on the Opt In: Service page, click **Done** again.

Your users can now access Service Center including Work Orders (Next Generation).

How do I add, hide, or rearrange fields?

This is a worked example on how you work with form fields in VB Studio. You can add, hide or rearrange the order of fields. As with previous examples, we'll use Create Service Request.

1. In the Rule Set editor, from the Dynamic Form list, select the **Create Service Request** form.
2. Duplicate the layout, then select the duplicate record.
3. Click the **Open** icon.

The layout is displayed with its included fields, and in the explorer, all available fields.

4. To add a field, click the check box of any field shown in the field explorer.

The added fields, including custom fields added with Application Composer, will appear at the end of the layout.

5. To reorder fields, click the control beside the field, and drag the field to where you want it to go in the layout order.

The following screen capture shows the control you use to drag and drop fields in the layout.



6. To hide a field either deselect the field in the field list, or hover in the field in the layout and click the **X**.

How do I add a read only custom field using VB Studio?

Now, we'll create and add a custom field in VB Studio then add it to a layout. For this example, we'll be creating a custom field based on the SR severity.

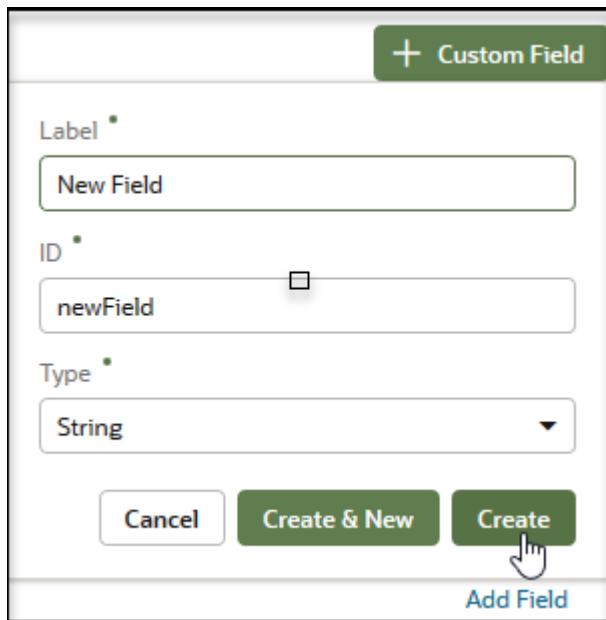
Note: Custom fields created in VB Studio are read only. To create a custom field that will retain changes to the database, you must use Application Composer. To create a custom field in Application Composer, see [How do I create a custom field?](#)

1. In the Applications Extensions explorer, navigate to **App UIs > Oracle Fusion Service UI Extension App > Service > ec > sr > edit**.

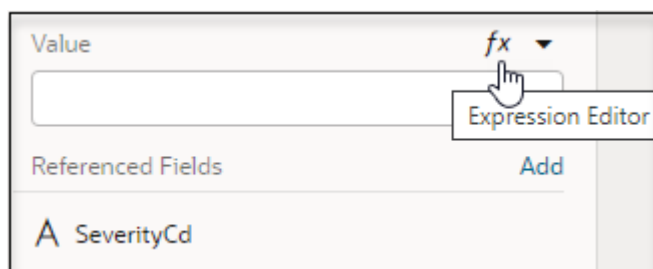
Remember, we're using the Service Request layout for this exercise.

2. Click the **Fields** tab.

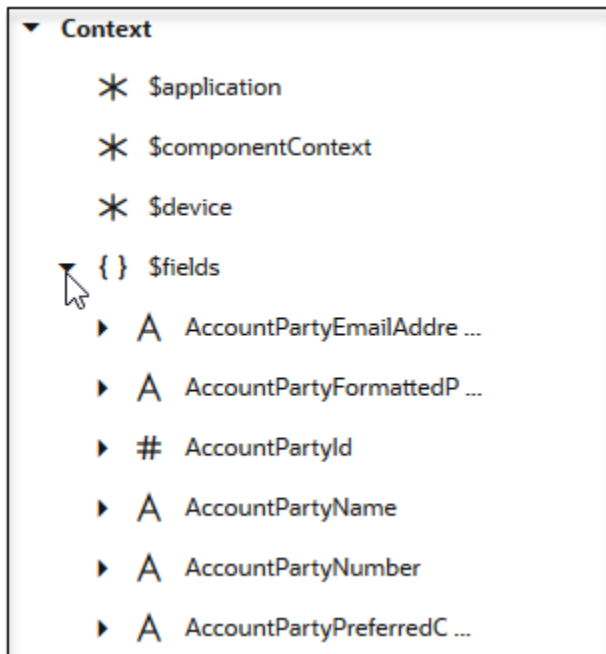
3. Click the **+ Custom Field** button.



4. In the **Custom Field** dialog box, enter the field name that you'd like reflected in the UI.
5. Click **Create**.
6. From the list of fields, select the newly created custom field.
7. In the Properties pane, add referenced fields by doing the following:
 - a. Click the **Add** link for the Referenced Fields property.
 - b. In the **Referenced Field** text field, start entering the word and then choose the **SeverityCd** field from the results that appear and then click **Add Field**.
8. Now, click the Expression editor:



9. Now in the Expression Editor, set the conditions that govern when the field is displayed by doing the following:
 - a. From the Context explorer, expand the fields list.



- b. Find the **SeverityCd** field in the list, expand it, and drag **value** into the editor.
 - c. Add the following to the expression: `=== 'ORA_SVC_SEV1'? 'High Severity SR': 'Not a high Severity SR'`

```
1 $fields.SeverityCd.value()=== 'ORA_SVC_SEV1'? 'High Severity SR': 'Not a high Severity SR'
```

- d. Click **Save**.

Now the custom field will only display if and value has a severity code of 1.

10. Click **Rule Sets** to return to the layout.
11. In the Fields explorer, enter the name for the custom field.
12. Click the check box to include the field in the layout.
13. Drag the field to where you want it to appear in the UI.
14. Use the Field properties window to choose one of the default templates from the **Template** drop-down list.
15. Click the **Create** link to create your own template.
16. Click the **Preview** button to view your changes.

Details on creating a template are in the [Create Your Own Field Template](#) topic in this chapter.

How do I make a field read only or required?

This task shows you how to set properties on a dynamic form to make its fields read only or conditional. For this example, we'll use the Create Service Request layout.

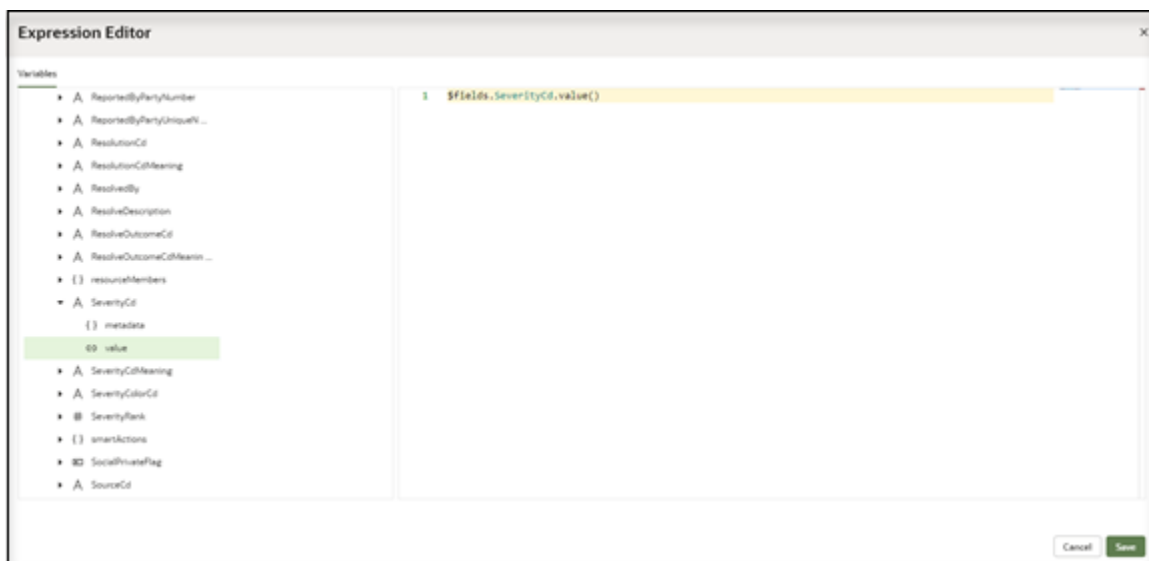
Note: Required and Read Only are only available if a field in a layout isn't associated with a template.

First duplicate the default form if necessary, or choose your own layout, and then do the following:

1. Select the layout.

The layout is displayed with the fields shown.

2. Note the **Read Only** and the **Required** check boxes in the Form properties area.
3. To make the field read only, simply click the **Read Only** check box.
4. To make the field required, just click the **Required** check box.
5. To make a field conditionally required, do the following:
 - a. Hover over, and then click the **Expression Editor**.
 - b. Select a variable from the drop-down list.
 - c. To edit the conditions of the variable, hover over then, select the **Expression Editor**.
 - d. In the Expression Editor, expand the **fields** variable list.
 - e. Expand the SeverityCd variable and drag **value** on to the editor workspace as shown in the following example:



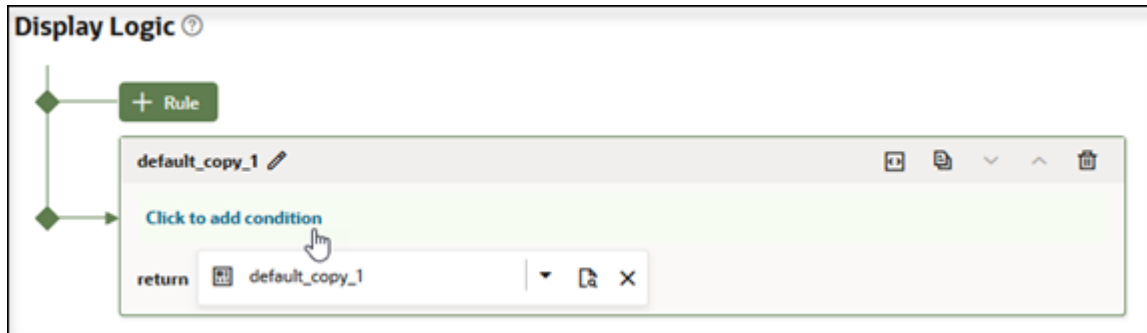
- f. Add the following value to the expression: `=== 'ORA_SVC_SEV1' .`
- g. Click **Save**.

Now the field only displays when severity level 1 is reached

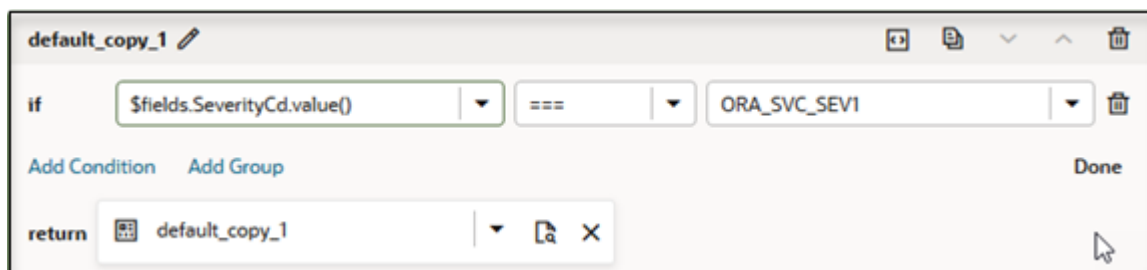
How do I add conditions to a form using VB Studio?

In this example, we'll add a condition that specifies that a form displays only if a certain SR severity level is reached. First duplicate the layout, or choose your layout, then do the following:

1. Click the **Click to add condition** link.



2. From the **Attribute** drop-down list, select the severity code value: `fields.SeverityCd.value()`, then in the Value field, enter: `ORA_SVC_SEV1` as shown in the following example:



- 3.

Now the layout will only display when a service request has a severity code value of 1.

Example of Making a Layout Visible Based on Category Conditions

Here's an example of how to make your layout visible when using category conditions:

1. In the categoryId field add the value within single quotes as follows:
`fields.CategoryId.Value() === '123'`
2. For the categoryName field to display, you must expose it in one of the create layouts.
3. Create a dummy layout and expose **categoryName** and use the category Name value in the conditional rendering.

For example:

```
fields.CategoryName.Value() === categoryName Document URL and section
```

How do I close a service request?

Here's how you can resolve a service request.

You can use rich-text to create SmartText entries in request message fields by enabling HTML. Other fields, such as Problem Description and Solution Description only support plain text.

1. Open the Service Request Overview page for the service request you want to resolve.

- In the **Action Bar**, enter **Resolve**.

You can also enter synonyms such as **Close** or **Complete**.

- Select **Resolve Service Request** from the list of suggested actions.

The **Resolve Service Request** panel is displayed.

Note: The values in the drop-down lists in the **Resolve Service Request** panel are configured by your administrator. The following steps are an example of the resolve flow based on the ready-to-use data provided in the application. You need to select the appropriate values for the service request. For example, when resolving a service request where a knowledge article helped solve it, select the following values for steps 5, 6, and 7.

- From the **Status** drop-down list, select **Resolved** (selected by default).
- From the **Outcome** drop-down list, select **Solution Provided**.
- From the **Resolution** drop-down list, select **Knowledge Article**.
- From the list of knowledge articles (if some knowledge articles are already linked to the service request), select the articles that resolved the service request.

Note: The list of linked knowledge articles is displayed only when you select **Solution Provided** outcome and **Knowledge Article** resolution.

- In the **Solution Description** field, enter the details explaining about the solution of the problem.

You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.

- Click **Resolve**.

How do I update service request fields?

You can update SR fields from the **Action Bar**. Enter **update** to view a list of individual fields you can update. Here's a list of the fields you can update for a service request:

Action	Description
Update Account	Change the account associated with the service request.
Update Asset	Change the asset associated with the service request. <ul style="list-style-type: none"> If you select an account for the service request, then you can select an asset for that account. If you don't select an account but associate a contact with the service request, then you can pick an asset for the contact. If you don't select an account or a contact, you can't select an asset.
Update Assigned To	Change the agent to whom the service request is assigned.
Update Category	Change the category of the service request.

Action	Description
Update Critical	Specify whether the service request is critical or not critical.
Update Primary Contact	Change the primary contact associated with the service request.
Update Problem Description	Change the problem description of the issue. You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.
Update Queue	Change the queue to which the service request is assigned.
Update Related Objects	Change the relationships between two associated service requests and cases.
Update Severity	Change the severity of the service request.
Update Status	Change the status of the service request.
Update Title	Change the title of the service request.

How do I compose messages?

In the **Action Bar**, enter **compose** to view a list of message types that you can use to send messages to customers or team members. Here's how you compose the various message types for a service request:

Action	Description
Compose Email	Start a new email conversation with a customer. Messages created using this action are sent as an email to all the recipients on the message.
Compose Internal Note	Create an internal note in the service request. You can use internal notes to save any notes on the service request, such as research work you've done to resolve a service request. Internal notes aren't visible to customers in the customer portal or to partners.
Compose Web Message	Send a message to a customer on the customer portal. The customer contact can see the web messages by signing into the customer portal.
Capture Customer Message	Capture what the customer has reported to you about the service request. You should use this action only if you aren't using the typical ready-to-use channels such as telephony or email integration. Messages or comments created by customer contacts using the customer portal also show up as customer messages.
Compose Message	Use this action if you've defined your own channel types and want to create a message of type response, using that channel type.

Action	Description
Start Internal Conversation	Start a new conversation with an internal user. Use this action to contact internal users for help in resolving the service request. In an internal conversation, you can contact other users using these channels: Email, Slack, Microsoft Teams, Web.

Compose Email

To send a new email (start a new email thread):

1. Open the Service Request Overview page for the service request for which you want to send an email.
2. In the **Action Bar**, enter **Compose**.
You can also enter the synonym **Send**.
3. From the list of suggested actions, select **Compose Email**.
The **Compose** panel is displayed.
Note: The channel type is selected as **Email** by default.
4. In the **To** field, enter, or search and select the email recipients by typing a few characters and selecting the recipients from the list.
 - o If a primary contact exists for the service request, it's populated in the **To** field by default.
 - o You can optionally select other recipients from the **Cc** and **Bcc** fields.
 - o You can also add external recipients that aren't displayed in the list.
5. In the **Subject** field, enter the email subject.
6. Enter the email content.
You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.
7. To add an attachment to your message, drag the file you want to attach.
Note: If your administrator has set the ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY, ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE, and SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.
8. To preview your email before sending it, click **Preview**.
9. To save your email as a draft message, click **Save as Draft**.
The draft email is displayed in the **Pending** region.
 - a. To edit your draft email, click **Edit Draft**.
 - b. To delete your draft email, click **Delete Draft**.
10. Click **Send**.
All incoming and outgoing interactions are recorded, and displayed in the activity feed for the corresponding record.

To reply to an email or follow up to one you sent:

1. Go to that email in the activity feed:

- Click **Reply** when the last message in the email thread has a single recipient (To, Cc, and Bcc included).
- Click **Reply All** when the last message in the email thread has multiple recipients (To, Cc, and Bcc included).

When you reply to a message, it's added as a child of the message you're replying to, so that all messages in the email thread are grouped together as conversations.

Note:

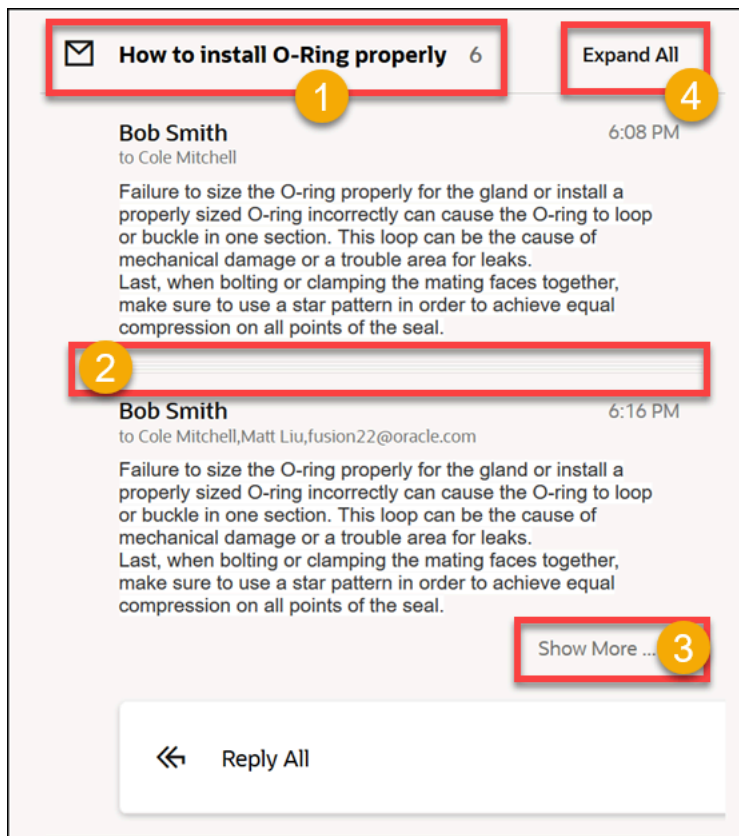
- If you preview your reply, the preview includes all past conversations in the email thread, up to the email you're currently replying to.
- If you save your reply as a draft message, it's displayed in the activity feed itself, and it's highlighted as **Draft**. You can edit or delete the draft email later. You can only have one draft message for each email thread.

2. Compose your reply and click **Send**.

In the activity feed, by default, up to 4 emails in an email thread are displayed fully. When there's 5 or more emails in an email thread, the first and last emails are displayed, with the other emails collapsed. The total number of emails in the email thread is specified on the email message header (callout 1 in the screenshot). Here's the different ways to expand the messages in the email thread:

- In an individual message that's contracted, click **Show More** to view the complete message (callout 3).
- To expand up to 5 emails in the email thread, click the email message header. The first 4 emails and the last email in the thread are displayed, with the other messages collapsed. To expand the remaining messages, click the double lines between the messages (callout 2).

- To see the entire email thread along with each individual message fully expanded, click **Expand All** on the email message header (callout 4). Once you've expanded the entire email thread, you can click **Collapse All** to collapse it.



Compose Internal Note

To post an internal note:

- Open the Service Request Overview page for the service request for which you want to post an internal note.
- In the **Action Bar**, enter **Compose**.
- From the list of suggested actions, select **Compose Internal Note**.

The **Compose** panel is displayed.

- Enter your notes.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

- To add an attachment to your message, drag the file you want to attach.

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

6. Click **Post**.

All internal notes are recorded, and displayed in the activity feed for the corresponding record.

You can edit the internal notes you've created, if your administrator has set the `SVC_ENABLE_MESSAGE_CORRECTION` profile option to **Yes**. Here's how you do it:

1. Go to your internal note in the activity feed.
2. Hover over the internal note header and click the **Edit** (pencil) icon.
3. Update your notes and click **Save**.

Compose Web Message

To send a web message:

1. Open the Service Request Overview page for the service request for which you want to send a web message.
2. In the **Action Bar**, enter **Compose**.
You can also enter the synonym **Send**.
3. From the list of suggested actions, select **Compose Web Message**.
The **Compose** panel is displayed.

Note: The channel type is selected as **Web** by default.

4. Enter your message.
You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.
5. To add an attachment to your message, drag the file you want to attach.
Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

6. Click **Save**.
All web messages are recorded, and displayed in the activity feed for the corresponding record.

Capture Customer Message

To record a customer message:

1. Open the Service Request Overview page for the service request for which you want to record a customer message.
2. In the **Action Bar**, enter **Compose**.
3. From the list of suggested actions, select **Capture Customer Message**.
The **Compose** panel is displayed.
4. Select the **Channel** and **Channel Type** from the drop-down lists.
5. In the **From** field, update the contact if required.
You can enter, or search and select a contact by typing a few characters and selecting the contact from the list.
6. Enter your message.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

7. To add an attachment to your message, drag the file you want to attach..

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

8. Click **Save**.

All customer messages are recorded, and displayed in the activity feed for the corresponding record.

You can click **Reply** to follow up on the customer message you captured. This creates a response message type. You can add multiple recipients and also use the **Reply All** and **Expand All** options as described in the "Compose Email" section.

Compose Message

If you've created your own custom channels, here's how you can send a message:

1. Open the Service Request Overview page for the service request for which you want to send a message.
2. In the **Action Bar**, enter **Compose**.

You can also enter the synonym **Send**.

3. From the list of suggested actions, select **Compose Message**.

The **Compose** panel is displayed.

4. Select the **Channel** from the drop-down list, such as email, phone and so on.
5. In the **To** field, enter, or search and select the message recipients by typing a few characters and selecting the recipients from the list.
 - o If a primary contact exists for the service request, it's populated in the **To** field by default.
 - o You can also add external recipients that aren't displayed in the list.

6. In the **Subject** field, enter the message subject.

7. Enter your message.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

8. To add an attachment to your message, drag the file you want to attach..

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

9. Click **Save**.

All messages are recorded, and displayed in the activity feed for the corresponding record.

You can click **Reply** to follow up on the message you sent. This creates a response message type. You can also use the **Reply All** and **Expand All** options as described in the "Compose Email" section.

How do I extend my application?

Your application is built using Oracle Visual Builder Studio and Oracle JET components. Visual Builder Studio is a single place where organizations can manage projects, environment and repositories; a Visual Builder Designer is where you can extend your application. From VB Studio, you can open many different designers.

Visual Builder Studio is the browser-based tool that your organization can use to make modifications and extensions to the Redwood user interface. Using the extension framework, you can change the user interface such as displaying custom fields on forms, creating dynamic layouts for a form, or embedding custom content in a dynamic container in a page.

Your VB Studio instance is paired with your Test instance of Fusion Applications. This means that your design time experience will be based on data in the Test instance database and a sandbox in the Test instance (if you're working within a sandbox).

The changes you make using VB Studio are stored in an artifact called an application extension. An application extension can be something as simple as a field added to a cloned, custom, or new form, or a new container of forms. You can create extensions, then preview them to see how they look in your UI. To create an extension that impacts the data model, you must use a sandbox within Application Composer, then use the Edit Pages in Visual Builder option to expose your changes in the UI.

You navigate to the VB Studio Designer directly from within the Redwood application. VB Studio is a **design at runtime tool**, which allows you make UI changes and then immediately preview the results before publishing the changes to other users.

VB Studio is just one tool that administrators can use to make application changes. As mentioned before, you extend the underlying object model used by the Redwood application with Application Composer. The model changes you make in Application Composer are reflected in the RESTful API for those objects, and thereby become available to the VB Studio Designer for use in UI extensions.

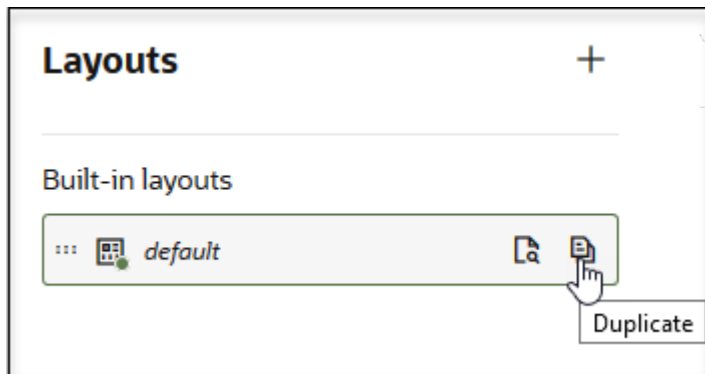
How do I duplicate a form in Visual Builder?

This example, using the Create Service Request form, will show you how to extend or change a form.

Note: It's highly recommended that you duplicate any form that you work with before you change or extend it.

1. Click the App UIs tab, then **Oracle Fusion Service UI Extension App > service > ec > sr > create**.
2. In the Properties pane, click the **Components** tab, and select **serviceRequests - Create Service Req**, and then click the **Open Rule Set Editor** link.
3. In the Designer, you'll see the available layouts, along with the display logic of that layout.
4. Select a layout.

- In the Built-in layouts area, hover in the default layout, and select the **Duplicate** button.



- In the **Duplicate Layout** dialog box, enter a name for the layout and click **Duplicate**.

View Form Properties

Now let's just look at some properties of the new form. The Rule Set properties list the form's properties along with a list of templates.

- After you duplicate the form, select it in the Designer.
- Click the **Fields** tab to view available fields for the form.

How do I map work order attachment fields?

The table in this topic details field mappings for attachments in Oracle Field Service. The fields are updated in Oracle Fusion Service through Oracle Integration.

Attachment Field Mapping

The following table shows the Oracle Field Service to Oracle Fusion Service field mappings for attachments.

Oracle Fusion Service Property	Data Type	Oracle Field Service Property	Data Type	Condition
Attachment	file	wo_attachment	file	Enter the allowed MIME type.
Photo	image	wo_photo	file	NA

How do I enable users to create an audit trail?

You can create an audit trail of changes made to service requests.

By default, only certain fields of the Service Request object are audited. If you want more fields to be audited, you must add them. You can also do an audit for the child objects by doing some configuration. Similarly, you must enable the audit for any administrator-defined child objects that you create from Application Composer.

To enable the audit for more fields or the child objects of the Service Request object:

1. Sign in to the application as a setup user or administrator.
2. Navigate to the Setup and Maintenance work area.
3. Open the Tasks panel tab and click **Search**.
4. In the **Search** window, search for and click the **Manage Audit Policies** task.
5. On the Manage Audit Policies page, click **Configure Business Object Attributes**.
6. On the Configure Business Object Attributes page, select **Service** from the **Product** drop-down list.

All the objects that can be audited are displayed. This includes the administrator-defined objects or administrator-defined child objects for predefined entities created using Application Composer.

For the Service Request object, the **Audit** check box is selected by default. The subset of attributes that can be audited are also displayed.

7. Click **Add**.
8. In the **Select and Add Audit Attributes** dialog box, select the check box next to the attribute that you want to add, and click **OK**.
9. To add attributes to audit for each predefined or administrator-defined child object of the Service Request object, select the check box next to the object.

Note: The predefined child objects and administrator-defined child objects of the Service Request object are displayed. For each of these child objects, one or more attributes are audited by default.

10. Repeat steps 7 and 8 to add more attributes.
11. Click **Actions > Synchronize**.
12. Click **Save and Close**.

Note: The audit for the Category object is enabled by default. But you can add more attributes by following the same steps as above.

How do I create unique rules?

Here are some pointers for creating unique rules:

- You must create unique rules in such a way that two different rules don't match the same work item. If multiple rules match the same work item, the Assignment Manager randomly picks one of those matching rules.
- You must also ensure that you don't have duplicate or identical rules. Duplicate or identical rules doesn't mean identical conditions. It means that multiple rules match the same incoming work item, even if the rules are defined on different fields or a combination of fields.
- If you can't create unique rules, you must put the rules in the same rule set and use scoring to identify which queue is picked by the Assignment Manager. You've the option to select or deselect the Use Score option on a rule set. If you select Use Score, then for every rule in the rule set, you must indicate the amount to increase the score when the rule is true. You must also set Filter as Top X and Number of candidates as 1. All the rules in a rule set are executed, and the queue with the highest total score is selected.

For more information, see Manage Service Assignment Rules.

Note: Scoring applies only inside a rule set. But you might have scenarios where identical rules are present in different rule sets, and multiple rules from different rule sets match a work item. In such cases, the Assignment Manager randomly picks one of those identical rules.

Let's see a few examples of how you can make a rule unique:

Example 1 for Making a Rule Unique

Let's say you write the following rules:

- **Rule 1:** Variable A=1 and Variable B=2 (Action: Assign work item to Q1)
- **Rule 2:** Variable A=1, Variable B=2, and Variable C=3 (Action: Assign work item to Q2)

Then the Variable A=1 and Variable B=2 part is common in both the rules. When an incoming work item satisfies Rule 2, it also satisfies Rule 1. And the Assignment Manager randomly picks one of the two.

To make these two rules unique, you can add a condition about variable C in Rule 1. For example, you can add the following condition to Rule 1: C isn't equal to 3.

Note: Rule 1 and Rule 2 are identical if you get a work item with all 3 variables and both rules are matching.

Example 2 for Making a Rule Unique

Let's consider the following example involving different rule sets. In Rule Set 1, you've a rule with the condition C1=A. In Rule Set 2, you've a rule with the condition C2=B. Here, C1 and C2 are different fields.

Now let's say you've a work item where C1=A and C2=B. These two rules aren't unique, and they both match the work item. In such a scenario, any one of the rules is randomly picked, and a queue is selected. But suppose you want the work item to be assigned only to a queue called Q1 because it has C1, and you want C2 to be ignored. Then you must make the rules unique by setting conditions such as the following:

- **Rule 1:** If C1 equals A and C2 isn't equal to B, then assign to Q1.
- **Rule 2:** If C1 equals A and C2 equals B, then assign to Q2.

Note: If the matching rules are in different rule sets, you can't apply scoring. If the matching rules were in the same rule set, scoring would help. For example: You set the scoring of Rule 1 to 10 and Rule 2 to 5.

