Oracle Fusion Cloud Customer Experience

How do I get started with Interviews?

Oracle Fusion Cloud Customer Experience
How do I get started with Interviews?

F93305-12

Author: Crescentia Kalpana David

Contents

Get Help i

1 Implementation Summary 1

Before You Start 1
Case Study 1
Implementation Overview 1
What you can do after completing the Interviews setup tasks 4

2 Get Started With Setting Up Interviews 5

Get your Cloud Account Details from the Welcome Email 5
Enter the Promotion Code 5
Enable the Interview Definitions Functional Area 6
Enable Assisted Authoring 6
Enable Assisted Interview Summary 7
Enable Running Interviews Through Action Plans 7
Enable Sales Call Guide 7
Set Up Interview Users 8

3 Verify Implementation 9

Author and Publish Interviews 9
Embed Interviews in a Redwood Knowledge Article 14
Embed an Interview in an Action Plan 15

Get Help

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

Get Help in the Applications

Some application pages have help icons ? to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

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

Join Our Community

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

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

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

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

Thanks for helping us improve our user assistance!

1 Implementation Summary

Before You Start

Verify that you are subscribed to either Sales, Service, or Help Desk service and that you received an email with your environment and initial sign-in information.

Case Study

In this playbook, a case study is used to define the scope of the implementation tasks and illustrate their interdependence.

The case study is based on a fictitious company named Vision Corp., a global high-tech company that sells laptop and multiple server product lines to businesses and other organizations. The company creates service tickets on its website that can be used by its customers to troubleshoot their products. The company would like its author users to use Interviews to create and manage guides and intake forms to provide interactive advice, troubleshooting steps, and collect information. Vision Corp. would like its authors to use Interviews to author guides and intake forms.

Implementation Overview

You can use this playbook to help you get started with your Interviews implementation. Implementing Interviews enables you to do the following:

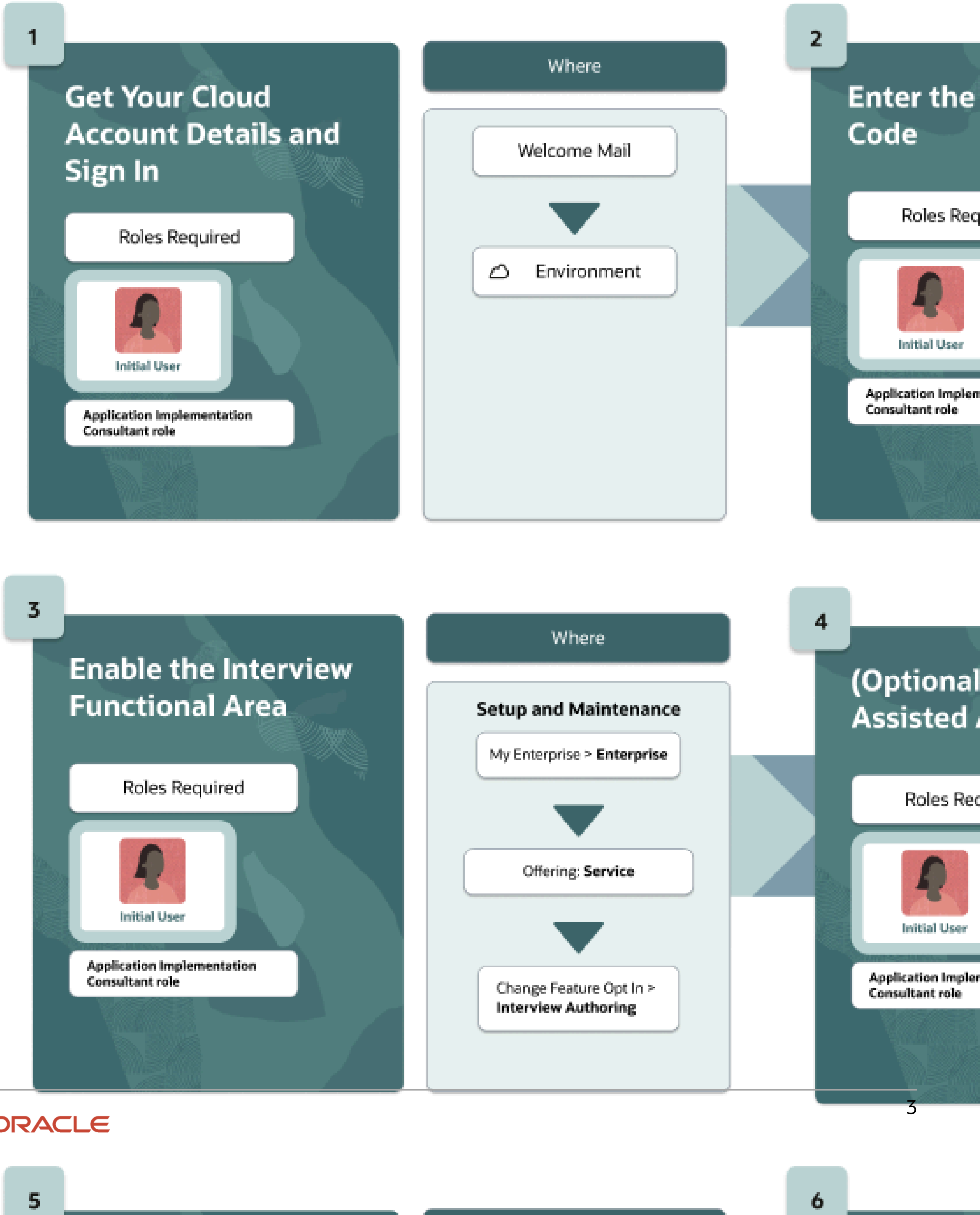
- Design custom intake forms to collect information from your customers.
- Provide interactive advice and guides.

At a high-level, here's what you need to do to implement Interviews:

- Get Started With Setting Up Interviews
  - *Get your Cloud Account Details from the Welcome Email*
  - *Enter the Promotion Code*
  - *Enable the Interview Definitions Functional Area*
  - *(Optional) Enable Assisted Authoring*
  - *(Optional) Enable Assisted Interview Summary*
  - *(Optional) Enable running of interviews through action plans*
  - *(Optional) Enable Sales Call Guide*
  - Set Up Interview Users. See: *Interview Users and Roles*
- Verify Implementation

    - *Author Interviews*
    - *Publish an Interview*
    - *(Optional) Embed Interviews in a Redwood Knowledge article*
    - *(Optional) Embed an interview in an Action Plan*

This graphic describes the steps for implementing interviews.


1
Get Your Cloud Account Details and Sign In
Roles Required
Initial User
Application Implementation Consultant role
Where
Welcome Mail
Environment
2
Enter the
Code
Roles Req
Initial User
Application Implem
Consultant role
3
Enable the Interview Functional Area
Roles Required
Initial User
Application Implementation Consultant role
Where
Setup and Maintenance
My Enterprise > Enterprise
Offering: Service
Change Feature Opt In > Interview Authoring
4
(Optional
Assisted
Roles Rec
Initial User
Application Impler
Consultant role
5
6

What you can do after completing the Interviews setup tasks

- Design interviews, for example to understand the details of an employee grievance, troubleshoot an issue with a device, or provide guidance for a sales call. See: *Author Interviews*
- Make these interviews available for use to the application users. See: *Publish an Interview*
- Optionally, embed these interviews in Knowledge articles: See: *Embed the Interviews in a Redwood Knowledge article*
- Optionally, embed these interviews in Action Plans. See: *Embed an Interview in an Action Plan*

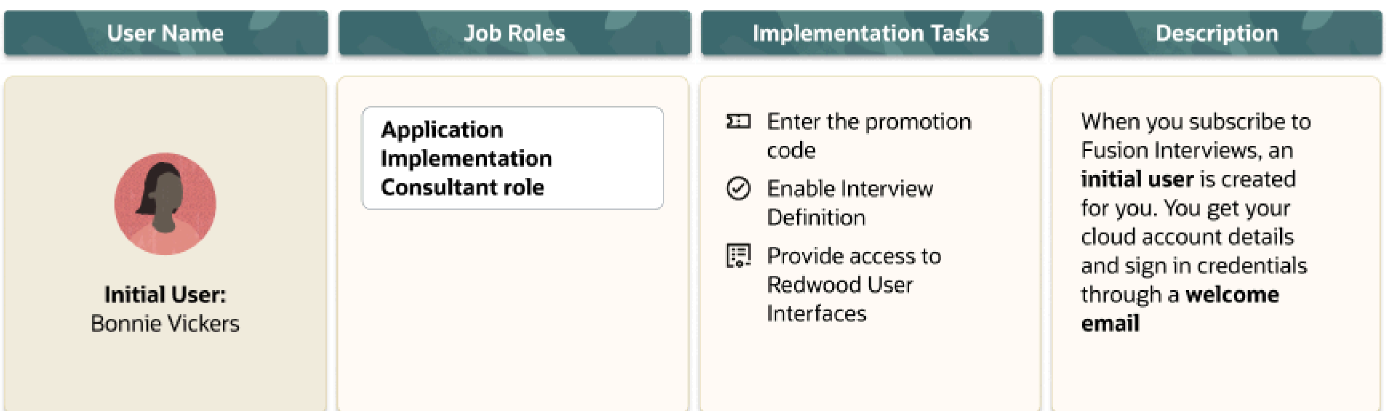
2 Get Started With Setting Up Interviews

Get your Cloud Account Details from the Welcome Email

When you subscribe to Sales, Service, or Help Desk, an initial user is created for you.

This initial user has the Application Implementation Consultant role, and can enter the promotion code, enable Interview Definitions, and provide access to Redwood UIs. You get your cloud account details and sign in credentials through a welcome email.

Let's help Vision Corp get started! In this use case, for Vision Corp., Bonnie Vickers is set up as the initial user.



Enter the Promotion Code

Let's set the ball rolling. Sign-in into your application environment as an initial setup user with Application Implementation Consultant role, such as Bonnie Vickers.

Before you proceed, ensure that you have the promotion code handy.

> **Note:** If you don't have a promotion code for Fusion Interviews, file an SR with Oracle Support.

Here are the steps for you to enter the promotion code:

1. Click **Navigator** > **My Enterprise** > **Enterprise**.
2. On the Enterprise Information page, click the Manage Promotion Codes link.
3. On the Manage Promotion Codes page, click Enter Promotion Code.
4. On the Enter Promotion Code dialog box, enter the promotion code and click Save and Close.

The application displays Interview Authoring Promotion Code in the list of promotion codes.

Enable the Interview Definitions Functional Area

The next task that you need to perform, is to opt into the offering that enables the Interview Definitions functional area.

Signed in as an initial user with Application Implementation Consultant role, such as Bonnie Vickers, complete these steps:

1. Click the profile icon on the Home page and select **Setup and Maintenance** under **Administration**.
2. Click **Actions** > **Change Feature Selection**.
3. Select **Interview Authoring** feature.
4. Click **Done**.

Now, you have access to the Interview Definitions functional area.

Enable Assisted Authoring

You can enable the assisted authoring option to use questions or steps suggested by Artificial Intelligence (AI) while creating interviews.

This step is optional and is needed only if you plan to use AI suggested content in your articles. You can always choose to enable this option at a later time.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for Manage Profile Options task and open it.
3. Search for the Enable Interview AI Suggestions profile option using the ORA_OIA_INTERVIEW_AI_SUGGESTIONS_ENABLED profile option code.
4. Select **Yes** as the profile value.
5. Click **Save and Close**.

   > **Note:** Changes in the profile values affect users the next time they sign in.

Enable Assisted Interview Summary

You can enable the assisted summary option to use text suggested by Artificial Intelligence (AI) during the interview to pre-fill the interview summary for the agent.

When this feature is enabled, templates that support interview summary (for example, Sales Call Guide template) will show an additional checkbox on the interview summary authoring screen "Default call summary with auto-generated text". When checked, the interview summary will be pre-filled for the interview user with text suggested by AI based answers provided during the interview. The interview user can then accept or override the suggested text.

This step is optional and is needed only if you plan to use AI suggested content in your interview summary. You can always choose to enable this option at a later time.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. Click the Tasks menu and click Search. Search for Manage Administrator Profile Values task and open it.
3. Search for the Enable Interview AI Suggestions profile option using the ORA_OIA_INTERVIEW_AI_ASSISTED_AGENT_SUMMARY_ENABLED profile option code.
4. Select **Yes** as the profile value.
5. Click **Save and Close**.

> **Note:** Changes in the profile values affect users the next time they sign in.

Enable Running Interviews Through Action Plans

You can enable action plan and interviews integration by enabling Interviews in the Help Desk setup task.

This step is optional and is needed only if you plan to use action plans.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.

   Ensure that the Help Desk Setup task is selected.
2. Click **Change Feature Opt in**.
3. Scroll down to Action plans and click Edit (the pencil icon) under the Features column.
4. Select **Run Interviews Through Action Plans** feature.
5. Click **Done**.
6. Click **Done** again.

   > **Note:** Sign out and sign in again into the application so that the changes are applied.

Enable Sales Call Guide

Enable sales call guide by enabling the Sales Guides in Redwood Enabled (ORA_ZCA_ENABLE_SALES_GUIDES) profile option.

This step is optional and is needed only if you plan to use sales call guide.

You can always choose to enable this option at a later time.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for Manage Administrator Profile Values task and open it.
3. Search for the Sales Guides in Redwood Enabled profile option using the (ORA_ZCA_ENABLE_SALES_GUIDES) profile option code.
4. Select **Yes** as the profile value.
5. Click **Save and Close**.

Note: Changes in the profile values affect users the next time they sign in.

Set Up Interview Users

Interview Users and Roles

These roles and privileges are needed for embedding interviews as articles in Service Center, Case Management, Help Desk, and Knowledge:

User Name	Job Roles	Feature	Privilege	Description
Author User: Braun Travis	**Customer Service Manager** **Case Manager** **Knowledge Manager** **Next Gen Human Resource Help Desk Manager**	Fusion Service Case Management Knowledge Helpdesk	ORA_SVC_CUSTOMER_SERVICE_MANAGER ORA_SVC_CASE_MANAGER ORA_CSO_KNOWLEDGE_MANAGER_JOB ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_NG	Embed interviews as an **action plan** in Service Center. Embed interviews as an article in **Case Management**, **Helpdesk**, and **Knowledge**

3 Verify Implementation

Author and Publish Interviews

After performing the steps to enable Interview Definitions functional area and, optionally, enabling Interview AI Suggestions for assisted authoring and summaries, you can start creating and managing interviews.

Verify that your Interviews implementation was successful by clicking **Navigator** > **Service** > **Interview Definitions** and perform these tasks.

- *Author Interviews*
- *Publish an Interview*
- Optionally, *Embed Interviews in a Redwood Knowledge Article*
- Optionally, *Embed an Interview in an Action Plan*

Author Interviews

After Interviews is successfully set up, you can now author Interviews to author guides and intake forms.

The type of interviews you can create will depend on the templates available to you, For example;

- Using the Troubleshooting template, a Service manager can create a troubleshooter for use by agents or on your organization's website to help resolve common issues. For example, a customer is facing a "no sound" issue on their laptop. You can use Interviews to create a troubleshooting content for resolving the "no sound" issue on your customer's laptop, using the Troubleshooting Template.
- Using the Grievance template, a HR Help Desk manager can guide a HR Help Desk agent on how to handle an employee grievance according to policy guidance, ensuring information is correctly collected and specific advice is provided for the circumstances. For example if an employee is concerned that they have been repeatedly passed up for a promotion, the agent can be guided on what information to collect and how to follow up with their manager (or other appropriate process).
- Using the Sales Call Guide template, a Sales manager can provide a Sales agent with a script to follow when conducting a sales call with a customer or prospect. For example, when conducting an upsell sales call, the agent can be provided with a guided questionnaire to understand their specific business needs in that area.

To author an interview, select Interview Definitions from the navigator menu. You will find this under the Redwood Sales, Service or Help Desk menus.

Once on the Interview Definitions page, click on an existing Interview Definition from the list to continue authoring, or select Create Interview to create a new Interview.

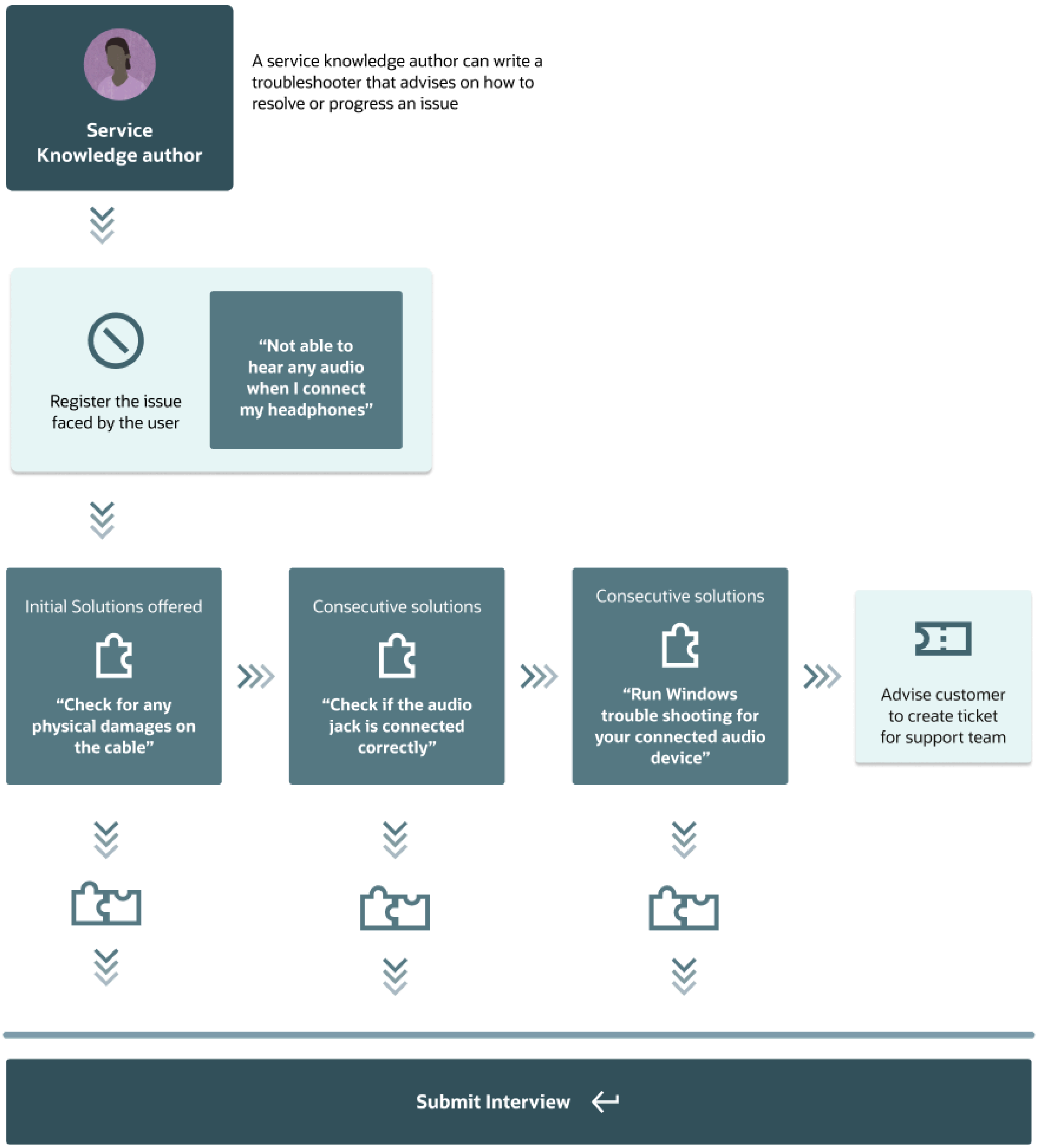
> **Note:** The authoring page has two modes; Edit mode and View mode. The Edit mode is only available when you have edit permission and the interview isn't checked out by another user.

Follow the instructions in the examples below to understand how to author each type of interview.

Interview Authoring Example: Create Laptop Troubleshooter

Suppose Vision Corp wants to build a troubleshooting article which helps customers to resolve issues with their laptop.

This graphic describes how you can write troubleshooting content that provides guidance on how to resolve an issue.



Signed in as an Service manager with author permissions, you can use these steps to author a troubleshooting article for the "no sound" issue on a laptop:

1. From the Interview Definitions page, select **Create interview**.
2. Give the interview a name (for example, “Laptop Troubleshooter”) and select the Troubleshooting template. You are then ready to begin adding interview content.
3. Use the Introduction page to welcome the customer.
4. Use the Branching questions and responses to gather information about the product. For example, use a branching question to find if the customer has an issue with their laptop or desktop.
5. Use Follow up Steps to gather more information about the issue. Follow up Steps can be of the following type:
   a. Branching Questions: Use further branching questions to gather information about the product such as the model information and so on. You can then gather information about the issue.
   b. Use the Data Collection page to gather any information from the customer to log a ticket.
6. Use Solution option to provide the following possible solutions to the issue. If a solution works, go to the next step. Otherwise, continue with the sequence of troubleshooting steps.
   a. Check the audio ports for damage, and clean the ports
   b. Restart your laptop
   c. Check the connection (external speakers, headphones, or earphones)
   d. Check volume settings and set the default playback device for low or no sound
   e. Run the Microsoft Sound Troubleshooter
   f. Reinstall or Update the chipset, audio, and BIOS drivers
   g. Run a hardware diagnostic test
   h. Download and install Microsoft Windows updates
   i. Perform Windows System Restore
   j. Restore the computer to factory default settings
7. Use the Shared Final Page to provide a consistent end experience to the interview.

   > **Note:** Interviews must end with a Data Collection page or Shared Final page to be complete, so that the user always has an outcome even where none of the solutions solve the problem. Use the “show incomplete steps” toggle to show paths that still require an end screen.

> **Note:** Use Assist AI to let AI generate the troubleshooting content. Use Author's notes to add any comments that shouldn't be visible to the user. This is useful when you are designing and collaborating with other interview authors or for storing some details about the troubleshooting content.

Interview Authoring Example: Create Upsell Call Guide

Suppose Vision Corp wants to build a guide to help their sales agents to identify areas where existing customers may be interested in purchasing other products.

Signed in as a Sales manager with author permissions, you can use these steps to author a sales call guide interview for use on upsell calls:

1. From the Interview Definitions page, select Create interview.
2. Give the interview a name (for example, “Upsell Guide”) and select the Sales Call Guide template.
3. Select the object for the interview will be available for (for example, Lead will result in the published interview being shown to a sales agent making a call on a Lead record). You are then ready to begin adding interview content.
4. Use the Introduction page to advise the agent on how to begin the call.

5. Use the data collect questions to gather information about the customer's business. For example, use a question to ask whether they have a particular business problem.
6. Use fields to collect or confirm data already known about the Lead or Opportunity.
7. Use Conditional visibility on questions to show or hide information based on the responses to previous questions.
8. Optionally, show the Interview Summary page if you would like to include a short summary of key elements of the call.

Note: Use Assist AI to let AI generate the sales call guide content. Use Author's notes to add any comments that shouldn't be visible to the user. This is useful when you are designing and collaborating with other interview authors or for storing some details about the guide content.

Interview Authoring Example: Create Promotion Dispute Grievance Interview

Suppose Vision Corp wants to build a guide to help their HR Help Desk agents to resolve employee grievances.

Signed in as a HR Help Desk manager with author permissions, you can use these steps to author a grievance interview to resolve an employee promotion dispute:

1. From the Interview Definitions page, select Create interview.
2. Give the interview a name (for example, "Promotion dispute") and select the Grievance template.
3. Select the object the interview will be available for (for example, Case will allow the interview to be used in action plans on the Case object). You are then ready to begin adding interview content.
4. Use the Introduction page to advise the agent on how to use the interview, and the types of grievances it is appropriate for.
5. Use the data collect questions to gather information about the employee's concerns. For example, to collect the date the issue occurred, whether the employee has tried to resolve the issue themselves, and what their preferred outcome is.
6. Use fields to collect or confirm data already known about the grievance.
7. Use Conditional visibility to show or hide information based on the responses to previous questions.
8. Optionally, add Forms to generate a PDF at the end of the interview.

Note: Use Assist AI to let AI generate the grievance interview content. Use Author's notes to add any comments that shouldn't be visible to the user. This is useful when you are designing and collaborating with other interview authors or for storing decisions on how to direct agents to resolve grievances.

Author Forms

The Grievance interview template additionally allows the author to design a PDF form that will be generated and attached to the record at the end of the interview.

This can be useful for creating:

- Decision letters
- Incident reports
- Other mandatory reporting forms

To create a Form you will need to have installed *Oracle Analytics Publisher Desktop*

To add a form to an interview:

1. From the Interview Definitions page, select Edit for the interview definition you want to create the form for.

2. Click View Details.
3. Enable Show field identifiers for document templates then close the Interview Details drawer.
4. Next to each question (field and data collect input), you should now see a variable name. For example, if you added a question “What outcome is the employee seeking?” a variable name “what_outcome” may be appearing next to that question. Take a note of the variable names of the data you intend to use in your form.

   > **Note:** You can change the variable name by selecting Edit Variable Name from the context menu next to the question.

5. Create or edit a form template using Oracle Analytics Publisher Desktop. Use the variable names from your interview as field names in your form. See *Designing and Publishing Pixel-Perfect Reports in Oracle Analytics Server* for information on designing form templates.
6. Save the form template.
7. Back in your interview definition, Click View Details to open the Interview Details panel again.
8. In the Forms section of the Interview Details drawer, select Add File to upload your form template. Once uploaded, close the Interview Details drawer.
9. In the Actions menu select Save as Draft to save your changes.

> **Note:** You can test your form is generating correctly, in the Interview Preview pane. On clicking End Guide, a page showing generated forms will appear for you to download and review each document.

Publish an Interview

Publishing an interview makes it available to all application users.

Sign in as an Author User, such as Braun Travis, and follow these steps to publish an interview:

1. Select and right-click an interview.
2. Click **Publish**.

   > **Note:** You can also Edit, Delete, Check in, Check out, and Unpublish an interview.

Embed Interviews in a Redwood Knowledge Article

You can embed the interview you created in Interview Definitions functional area in a Knowledge article.

This helps you reuse interviews, for example the laptop troubleshooting article, as a knowledge article and avoids the hassle of creating another knowledge article from scratch in Knowledge.

1. Click **Knowledge** > **Authoring**.

   The Knowledge Authoring page opens.
2. Click **Create Article** and select **FAQ**.
3. Specify the required fields.
4. Click the action menu, click the **+** icon, and click Link.

   The Add an Interview popup box appears.
5. Select the interview and the locale.

6. Click **Add**.

   You can see a placeholder of the interview added in your article. However, you can't see the actual content of the interview while you are editing the article.
7. Click **Save**.

   The content of the interview appears in the article.
8. Publish your article.

Embed an Interview in an Action Plan

You can now add an interview as a step within an action plan and resolve a service request or case.

You can orchestrate pre-defined interview steps for common troubleshooting patterns.

1. Go to **Navigator** > **Service** > **Cases**.
2. Search for Add Action using the action bar.
3. Type the name of the interview in the action bar and click it.

   A confirmation message that the action is saved is displayed.

You can now proceed to follow the steps in the interview.

After completing the interview, you can also view the transcript of the interview on the completed action.