Oracle Fusion Service

Implementing Case Management

Oracle Fusion Service
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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

Some application pages have help icons ⑦ 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.

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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.

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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!

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1 About This Guide

Audience and Scope

This guide is intended for you if you're responsible for implementing Case Management.

This guide doesn't cover the implementation of Oracle Fusion Cloud Customer Experience Sales or Oracle Fusion Cloud Fusion Service.

To set up and work with the additional features of Oracle Sales and Oracle Fusion Service, see the documentation on Oracle Help Center at https://docs.oracle.com.

Related Guides

To understand more about the implementation tasks covered in this guide, you can refer to the following table for a list of related guides.

Title	Description
Oracle Fusion Cloud B2B Service Using Fusion Service	Contains information to help service managers, service personnel, and other service end users to perform day-to-day business tasks using Oracle Fusion Service.
Oracle Fusion Cloud Customer Experience Understanding Import and Export Management for Sales and Fusion Service	Contains information to help those charged with exporting and importing object data.
Oracle Fusion Cloud Customer Experience Securing Sales and Fusion Service	Contains information to help setup users and sales administrators configure access to Oracle Sales functionality and data.
Oracle Fusion Cloud Customer Experience Security Reference for Sales and B2B Service	Lists the predefined security data included in the Oracle Customer Experience offerings.

Overview of Case Management

Case Management is a functional area in the Fusion Service offering.

You may have customer interactions that stretch over time, or that involve multiple parties. You can use the case object to manage these types of interactions and relate them to other objects such as service requests. Case Management is enabled by default.

Fusion Service Functional Areas Used with Case Management

The following table shows the additional functional areas of the Service offering that can be used with Case Management.

Functional Area	Description
Action Plans	Associate action plans with cases to help facilitate a series of steps or a sequence of events that may be required to resolve a case.

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2 Set Up Case Management

Opt Out of Case Management

Case Management comes ready to use with Fusion Service. If you don't wish to use Case Management, you can disable it.

To Disable the Case Feature

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

   - Offering: Service
   - Change Feature Opt in link
2. Click the **Features** icon for the Service offering.
3. Select Disable for **Case**.

Profile Options, Lookups, and Scheduled Processes

What are Profile Options, Lookups, and Scheduled Processes?

Profile options, lookup types, and scheduled processes let you configure application behavior and process data.

Briefly, here's what profile options, lookup types, and scheduled processes do:

- Profile options: Let you configure the application behavior.
- Lookup types: Provide the lists of values in applications. Many lookup types can be modified to fit your business needs.
- Scheduled processes: Act on data in the applications.

Get additional information on profile options, lookup types, and scheduled processes in this chapter and in the related topics.

Related Topics

- What are scheduled processes?
- How can I access predefined profile options?
- How can I access predefined lookups?

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Overview of Profile Options

Profile options let you configure and control application data centrally. Administrators and setup users manage profile options in the Setup and Maintenance work area.

Profile options store various kinds of information. This table lists some examples:

Type of Information	Profile Option Setting Example
User preferences	Set preferences at the user level
Installation information	Identify the location of a portal
Configuration choices	Change UI skins and actions
Processing options	Determine how much information to log
Enabling the Activity Stream	Enable agents to see the Activity Stream

Profile Option Hierarchy Levels

Profile options can be set at different levels, such as site level or user level. The application gives precedence to certain levels over others, when multiple levels are set. The levels that are allowed to be set are preconfigured with the application.

In the predefined profile option levels, the hierarchy levels and their precedence are:

1. Site: This level affects all applications for a given implementation. The application gives it the lowest precedence when other levels are set. If no other levels are set, however, it's the highest level.
2. Product: This level affects a product or product family. The application gives it priority over Site level. However, if the user level is set, the user level takes precedence.
3. User: This level affects only the current user. It has the highest precedence, over Site and Product.

As a best practice, set site-level profile option values before specifying values at any other level (where available). The profile option values specified at the site-level work as the default until profile option values are specified at the other levels.

This table shows an example of the predefined profile option hierarchy levels and their priorities.

Level	Priority	Example
Site	Lowest	Currency for a site is set to Euros.
Product	Supersedes Site	Currency for the product or set of products is set to UK pound sterling.
User	Highest, supersedes Product	Currency for a user is set to US dollars.

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Level	Priority	Example

You can find additional information about profile options in the related topics.

Related Topics
- Set Profile Option Values
- How can I access predefined profile options?

Lookup Types

Lookup types provide the lists of values in application fields that are drop-down lists. Lookup types for Case Management can be changed during or after your implementation.

For example, while creating a case, personnel can select the priority of the case from the Priority drop-down list. The values in that list are derived from the lookup type, ORA_SVC_SR_PRIORITY_CD. This lookup type has several potential values known as lookups, each with their own unique lookup code and meaning that displays in the UI.

> **Note:** You can't create a new lookup with the name starting with ORA, to avoid any conflict with the lookups predefined in the application.

How You Modify Lookup Types

You can change many lookup types during or after implementation.

The configuration level of a lookup type determines whether the lookups in that lookup type can be edited. The lookup configuration levels are: User, Extensible, and System.

Here's a table that shows which lookup management tasks are allowed at each modification level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Changing the wording that displays on the page (Meaning field)	Yes	Yes	Yes
Updating start date, end date, and enabled fields	Yes	Yes, only if the code isn't predefined data	No
Deleting codes	Yes	Yes, only if the code isn't predefined data	No
Updating tags	Yes	No	No

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Allowed Task	User	Extensible	System
Updating module	Yes	No	No

If a product depends on a lookup type, the configuration level must be set to system or extensible to prevent deletion. Once the configuration level is set for a lookup type, it can't be changed. The configuration level for lookup types created using the Define Lookups page is by default set at the User level.

Case Management Lookup Types

You can find lookup types by searching for an associated setup task in the Setup and Maintenance work area. Lookup types that are commonly edited are presented within the Case Management offering as one of the setup tasks or task lists. Other lookup types that are less frequently changed, might not be shown in the offering, but can still be accessed through the Manage Standard Lookups task. Here are some common help desk lookup tasks or task lists:

Case Lookup Types and Descriptions

Lookup Type Code	Description
ORA_SVC_CASE_CONTACT_REL_CD	Case Contact Relationship Code
ORA_SVC_CASE_MSG_STATUS_CD	Status of message.
ORA_SVC_CASE_MSG_TYPE_CD	Type of message associated with a case.
ORA_SVC_CASE_MSG_VISIBILITY_CD	Can be used to decide if message should be visible to internal or external users.
ORA_SVC_CASE_PRIORITY_CD	Priority of the case.
ORA_SVC_CASE_SENSITIVITY_CD	Sensitivity of the case.
ORA_SVC_CASE_SOURCE_CD	Sources of origin for case.
ORA_SVC_CASE_STATUS_CD	Status of a case
ORA_SVC_CASE_STATUS_TYPE_CD	Status type such as Active or Closed.
ORA_SVC_CASE_TYPE_CD	Type of the Case.
ORA_SVC_CASE_SEARCH_REC_SET_CD	Case search record set type.

How do I change lookups?

Administrators can change lookups for Cases. Optionally, you can map status values to status types. By default, the following five Status types exist for cases:

- Active
- Closed
- Inactive
- Resolved

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- Suspended

A case always has one of these status types. However, administrators might want to display different labels for status types or change the display sequence. For example, this might be useful in situations where you want to distinguish between statuses as "In Progress - Troubleshooting" versus "In Progress - Repairing." This procedure maps one or more Statuses to status types.

The following tasks are used to change the case lookups:

- Manage Case Contact Relationships
- Manage Case Priorities
- Manage Case Sensitivities
- Manage Case Sources
- Manage Case Statuses
- Manage Case Profile Options

To change lookups:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Case Management
   - Task: Select all tasks and click the task you want to change.
2. In **Lookup Codes**, click the lookup code that you want to change.
3. Change the fields to correspond to your needs.
4. Click **Save and Close**.
5. Repeat the procedure for all the case lookup tasks.

The case lookup is changed.

FAQs for Lookups and Lookup Types

How can I edit lookups?

On any of the Manage Lookups pages, you can edit the existing lookup codes of a lookup type or add new lookup codes. You can edit lookups using the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
- Manage Common Lookups
- Manage Set Enabled Lookups

Each task contains a predefined set of lookup types that are classified and stored. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its configuration level doesn't support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types.

However, the generic tasks provide access to all lookups types of a kind, such as common lookups associated with the Manage Common Lookups task. If the lookup types in an application are available in the standard, common, or set-

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enabled lookups view, they're central to an application. However, lookup types defined for a specific application are managed using the task for that application.

Can I create a new lookup name starting with ORA?

No, you can't create a new lookup with the name starting with ORA. The application validates the lookup names to avoid any conflict with the lookups seeded in the application.

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.

Profile Options and Scheduled Processes for Case Management

Case Management Profile Options

Profile options let you configure and control application data centrally.

Administrators and setup users manage profile options in the Setup and Maintenance work area. You can set various profile options and schedule job processes for case management. Some of the 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 case after N number of days, schedule a job process that closes cases.

Here's a table that describes the various profile options for case management:

Profile Options for Case Management

Profile Option	Description
SVC_ENABLE_CASE_IN_ACTION_PLAN	Enable Case in Action Plan feature. Once enabled, Actions as well as Templates can be created with Case as Context value.
ORA_SVC_CASE_REDIRECT_TO_ADF_ CONTACT	Enables redirection of all clickable contact links in the Case Details page to the ADF Contact page.
ORA_SVC_CASE_REDIRECT_TO_ADF_SR	Enables redirection of all clickable Service Request links in the Case Details page to the ADF Service Request page.

How do I configure the prefix and radix?

When a case 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 cases:

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 case **Object Name**, specify a prefix of your choice in the **Prefix** column. For example: SR-.
4. Click in the **Radix** column for the case object.

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5. From the multiple options displayed in the drop-down list, select the type of radix that you want for your cases.

   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 configure a scheduled process?

Here's how you configure a scheduled process:

1. Sign in to the application as an administrator.
2. From the **Navigator**, select **Scheduled Processes**. The Scheduled Processes Overview page is displayed.
3. Click **Schedule New Process**. The **Schedule New Process** dialog box is displayed.
4. Select **Job** as the **Type** option.
5. In the **Name** drop-down list, click **Search** to search and select the process that you want to configure.
6. In the **Process Details** dialog box for the selected job, click **Advanced**.
7. On the **Schedule** tab, select **Using a schedule** as the **Run** option.
8. Specify the **Frequency** for the job.
9. Select the **Start Date** and **End Date** for the job.
10. Click **Submit**.

> **Note:** The scheduled process is visible only to the user who creates the job.

Audit Trail for Case Management

How do I enable users to create an audit trail?

You can create an audit trail of changes made to cases.

By default, only certain fields of the Case 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 Case 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 **Case** 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 Case object, the **Audit** check box is selected by default. The subset of attributes that can be audited are also displayed.

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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 Case 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.

Enable Viewing the Audit Trail

To enable viewing the audit trail for cases in the Case Summary page, you must expose the Audit History tab using Application Composer.

For more information, see the Common Components Subtabs topic in the Oracle Fusion Cloud Applications Configuring Applications Using Application Composer guide. Follow the same steps as described for the Change History tab.

Note: A user can view the Audit History subtab on the Case Summary page only if their role has been assigned the SVC_VIEW_SERVICE_REQUEST_CHANGE_HISTORY privilege.

Related Topics
- Common Component Subtabs

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3 Users and Security

Enter Your Company Information and Corporate Currency

These steps are required if you haven't previously configured Fusion Sales in your instance.

What you have to do is enter basic information in the Sales: Setup page about your company and specify your corporate currency. Your entries are required for internal application purposes only and are required for your instance of Fusion Service. The information you enter creates a rudimentary enterprise structure and isn't visible to service organization users or customers.

When you finish this procedure you will have:

- Created a rudimentary enterprise structure required for internal application purposes only.

  The enterprise structure isn't visible to service organization users or their customers.

- Created a set of automatic role-provisioning rules that provision users with the required security roles.

This is a one-time setup. After you enter the information on the Create Company Information page, the page becomes read-only and the title changes to Review Company Information.

So, enter your company information and corporate currency by doing the following:

1. Open the task from the Setup: Sales page by clicking the **Quick Setup** icon for the Company Profile functional area (the gears icon highlighted by callout 1 in the following figure). If any changes are required after your initial setup, you can open the appropriate tasks in the Task area.
2. In the Create Company Information page, enter your company name in the **Enterprise Name** field.
3. Enter the country where your company is located.
4. Enter your company street address. Don't enter city or state and other information.
5. The first and last name fields list the names of the user who signed into the application. You can edit the entries.
6. When you're satisfied that the information is correct, click **Submit**.

   The application runs a background process to create the enterprise structure and create the role-provisioning rules.
7. Optionally, click **Refresh** to monitor the progress of the process.

   When the process completes, the Review Company Information page appears. The page displays both the information that you entered and the information that the process created for you. You can't edit any of the fields except Corporate Currency. None of the names you see are visible to salespeople, so they don't have to correspond to any actual entities in your organization.The following table list and describes the fields.

Field	Description
Enterprise Name	The name you entered.
Address	The street address you entered.

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Field	Description
Legal Entity	The enterprise name followed by the letters **LE**.
Business Unit	The enterprise name followed by the letters **LE BU**.
Initial User	Name of the user who's signed in.
Corporate Currency	By default, the corporate currency is US Dollar. Select a different corporate currency, if required.

This image shows the Corporate Currency field.

8. If your company uses a different currency than the US Dollar select the currency from the **Corporate Currency** list.
9. Record the **Legal Entity** and **Business Unit** names. You must enter these names when importing users.
10. Click **Save and Close**.

Overview of Defining Setup Users

One of your first tasks when setting up the application is the creation of users who can perform setup tasks.

Oracle creates an initial user for you when your environment is provisioned. This initial user is configured to perform security tasks, such as creating other users and granting additional privileges. As an initial user you can create users, known as setup users, to help with application setup. The setup user performs the tasks in implementation projects, sets up enterprise structures, creates application users, and administers security.

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Use the Manage Users task in the Setup and Maintenance work area to create setup users. You can access this task in the Setup and Maintenance work area by selecting these options:

- Offering: Customer Data Management

- Functional Area: Users and Security

- Task: Manage Users

Overview of Setting Up Users and Security

Since you followed the *Implementing Sales* guide steps to set up your initial set of users, then you already know that Oracle applications use a role-based access control security model to secure access to functionality and data.

In a role-based access control security model, users are assigned roles, and roles are assigned access privileges to protected system resources.

Sales and Service users who access the transactional UI, for example sales representatives or service representatives working in leads or service requests, are created as resources and are known as resources.

Default Preferences

To set up default preferences for users and roles, access the Security Console as a setup user or other user with the IT Security Manager job role. Only setup users, or other users with the IT Security Manager job role, can access the Security Console. See the *Securing Fusion Sales and Service* guide for more information.

User Identity Store

The Lightweight Directory Access Protocol (LDAP) identity store is a repository of user identity data. Your LDAP directory stores definitions of LDAP user accounts. In general, changes you make to user accounts are automatically synchronized between the sales application and your LDAP directory server. However, you must also run processes on a daily basis to manage the information exchange between your application and the LDAP directory server. For information, see the chapter about setting up application security in the *Securing Fusion Sales and Service* guide.

Setup Tasks in the UI and Other Setup Options

As a setup user, you use multiple different tasks in Setup and Maintenance to create and maintain users. You also have more setup options to consider. The following table describes these tasks and setup options.

Setup Task or Option and Navigation	Description
Manage Job Roles Task Navigation: Setup and Maintenance > Sales Offering > Users and Security functional area	Oracle provides many predefined job roles. The relevant sales roles are listed in the *Implementing Sales* guide. You perform the Manage Job Roles task to: • Review the role hierarchy of a job or abstract role. • Create custom job and abstract roles. • View the roles assigned to a user and list the users who have a specific role. This task opens the Roles tab of the Security Console.

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Setup Task or Option and Navigation	Description
Manage Duties Task Manage Sales and Service Access Management Task Navigation: Setup and Maintenance > Sales Offering > Users and Security functional area	You perform the Manage Duties task to: • Review the duties of a job or abstract role. • Manage the duties of a custom job or abstract role. • Create custom duty roles. This task opens the Roles tab of the Security Console.
Manage Data Security Policies Task Manage Sales and Service Access Task Navigation: Setup and Maintenance > Sales Offering > Users and Security functional area	You use the Manage Data Security Policies task to manage the data security policies that determine grants of entitlement to a user or role on an object or attribute group. This task opens the Roles tab of the Security Console. You can also use the Manage Sales and Service Access task to review and configure data security. This task opens the Sales and Service Access Management work area. For information, see the *Securing Fusion Sales and Service* guide.
Manage Users Task Navigation: Navigator > Users and Roles item or Setup and Maintenance > Sales Offering > Users and Security functional area	You create application users in the UI using the Manage Users task. A user with the IT Security Manager job role performs the Manage Users tasks. **Note:** You can also create sales users by importing users. For information on the user import options available, see the *Understanding Import and Export Management for Fusion Sales and Service* and *Implementing Sales* guides.
Manage HCM Role Provisioning Rules Task Navigation: Setup and Maintenance Sales Offering > Users and Security functional area	Oracle provides predefined role mapping rules for provisioning many of the standard job roles included with the application. However, using the Manage HCM Role Provisioning Rules task, you can create any additional role mappings you need to, to control the provisioning of roles to application users. For example, you can create a role mapping to provision the Channel Sales Manager role automatically to specific sales managers.
Import and Export Management	You can import users in bulk using data files. For information on the user import options available, see the *Understanding Import and Export Management for Fusion Sales and Service* and *Implementing Sales* guides.
Import Partner Users Task	You can also import partner contact data using the Import Partner Users task. For more information, see the *Getting Started with Your Partner Relationship Management Implementation* guide.
Single Sign-On Authentication	Single sign-on authentication is optionally available for user authentication. If your enterprise has moved from a traditional on-premises environment to an Oracle Cloud implementation, you might want to use your existing identity management solution for authenticating your employees, and you might also want to provide a single sign-on experience. Implementing federated single sign-on lets you provide users with single sign-on access to applications and systems located across organizational boundaries. For additional information, see Oracle Applications Cloud Service Entitlements (Doc ID *2004494.1*) on *My Oracle Support* at https://support.oracle.com.
Resetting User Passwords	Setup users provisioned with the IT Security Manager job role can use the Users tab in the Security Console work area to reset passwords for all application users. Users who can't access the Security Console can reset only their own passwords using the Set Preferences link in the Settings and Actions menu available by clicking their user name in the application or by using the Forgot Password link on the sign-in page. See the *Implementing Sales* guide for more information.

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Setup Task or Option and Navigation	Description
Updating Email Addresses	Use the Users tab in the Security Console work area to change user email addresses. You can use the procedure described in this topic to update addresses of both setup users and sales users. If you're updating the email addresses of sales users, then you can also use the same import process you use to create them. See the *Implementing Sales* guide for more information.

Note: Other data security tasks listed in the Users and Security functional area task list don't apply to the sales applications. Follow the guidance in the *Implementing Sales* and *Securing Fusion Sales and Service* guides.

Related Topics
- Set General Preferences for All Users
- Subject Areas for Adoption Reporting

What are resources?

Here's an overview of resources and the different ways that you can logically group them. See the related links for more information on each.

Resource

A resource is an application user who participates in business processes, such as Customer Service Manager or Help Desk Agent. You must identify or import resources before you can associate them with resource organizations or work objects.

Resource Role

You use resource roles to define role provisioning rules. For example, using a provisioning rule, you can assign the Customer Service Manager job role to a user with the Customer Service Manager resource role. Oracle Applications Cloud includes some predefined resource roles. Use these predefined, out of the box, resource roles, or create your own resource roles.

Resource Directory

The Resource Directory gives you detailed information about all the resources within a deploying organization. You can also use the Resource Directory to find and communicate with other resources, and to network and collaborate with them. Access the Resource Directory using the following path: Navigator > Resource Directory. You can also perform some of the functions of the resource directory using the Manage Resources setup task.

Resource Organization

You create resources and provision the permissions that the resources need to do their jobs. In the process, you also build the organization chart of your organization. You can assign organization usage information to resource organizations to classify them based on how on how you want to use them. For instance, you can assign resource

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organizations engaged in customer service activities to the Customer Service Organization usage. You can then sort organizations based on their usage.

A resource organization becomes a primary resource organization by usage for a resource, if you meet the following criteria:

- The resource must be a member of the concerned organization.
- The resource organization must be classified as an organization with the specific usage.

For example, if you classify the resource organization as a customer service organization by usage, then the resource organization becomes the primary resource organization for the resource for customer service.

Resource Team

A resource team is a temporary group of resources formed to complete a business task. A resource team can be made up of resource organizations, resources, or both. A resource team is neither hierarchically structured nor intended to implement an organization structure. You can use resource teams as a quick reference to groups of related resources to which you can quickly assign work objects.

Overview of Households

A household is a group of contacts generally sharing a common link or association.

Households provide valuable segmentation information about the household as a whole, as well as summary of information about the household member contacts. Usually all the contacts reside at the same address and have a similar set of entities that accounts do, such as team members and contacts.

Resource Teams

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**.

How Resources Work Within a Team

This topic explains how resources work within a team.

You can include resources from different resource organizations to work together on a work object as members of the same resource team. You can also include the entire resource organization into a resource team. The resource organization membership and their hierarchy determine what a resource can do. Resource teams provide a flexible way of bringing resources together without any organizational or hierarchy-based restrictions.

Assigning Resources to Teams

You can assign identified resources to teams and assign them roles within the team. Each resource can have a specific role within a team. A resource may play different roles in different teams.

How Resource Team Membership and Role Assignment Components Work Together

This topic explains the team membership and role assignment for resources.

Resources who are team members can be assigned different roles within the team. These roles don't necessarily reflect the roles these resources might play in resource organizations. Depending on the task requirements of the team, roles are assigned to resources. Based on the role assignment, resources can access data related to the tasks in the team. You can manage the resources in a team using the Manage Resource Teams task. You can access the Manage Resource Teams task as follows: Click **Navigator** > **Resource Directory** > **Tasks** > **Manage Resource Teams**.

Resource Team Membership

A resource can belong to multiple teams depending on the requirements of these teams and the skills that the resource offers. This doesn't affect the resource's membership with organizations within the deploying company.

Role Assignment

Resources have specific roles to play in the team to which they belong. Each of these roles can be different. Also, these roles can be different from the roles assigned to the same resources in resource organizations. Thus, a resource can be a manager in one team and a member in another simultaneously.

FAQs for Defining Resource Teams

What's a resource team?

A resource team is a group of resources formed to work on work objects. A resource team can comprise resource organizations, resources, or both. A resource team is neither hierarchically structured nor intended to implement an organization structure.

You can use resource teams as a quick reference to groups of related resources to which you can quickly assign work objects.

Note: You can either individually assign the members of a team to a task or assign entire teams to tasks.

What's the difference between a resource organization and a resource team?

A resource organization is an organization whose members are resources. Resource organizations are used to implement sales organizations, partner organizations, and so on.

A resource team is a temporary group of resources formed to work on work objects. A resource team may contain a resource organization or resources or both. A resource team can't be hierarchically structured and isn't intended to implement an organization.

Can I assign multiple resource roles to a team member at the same time?

Yes. Resources within resource teams can have multiple resource roles. You can add roles to a resource in a resource team using the Manage Resource Teams task. Select the resource and click the Edit button to assign additional roles to the resource.

Security Roles

About Security Roles

Many job roles and duty roles are predefined . The following table lists the main predefined job roles specific to Case Management.

For a more complete list of job roles, see the Security Reference for Fusion Sales and Service guides on Help Center.

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Job Role	Description
Case Manager	A case manager is a senior case worker with supervisory responsibilities. The case manager is responsible for identifying the best approach to difficult cases that require approvals or significant discretion. For example, where there have been overpayments to a benefit recipient that need to be covered, or where there are unusual case circumstances. The case manager is also responsible for coordinating care and benefits with external providers, such as foster care.
Case Worker	A case worker is responsible for day-to-day help for an individual, family, or group. Cases (which might be applications for benefits, reports of welfare issues or abuse, or other matters to investigate) are allocated to case workers, who are responsible for assessing the requirements of each case, identifying government programs or other resources (for example, community groups) which can help, and following up to track progress and suggest other plans if required. Some government programs require case workers to work in the field. For example, finding people who require help such as the homeless, visiting less mobile members of the community such as elderly, and assessing benefit applicants and recipients living environments.

In addition to the job roles, the following table lists the duty roles specific to the Service offering.

Duty Role	Description
Case Execution	Helps clients who are applying for benefits, opens cases and manages all tasks related to the case, processes clients applications, evaluate clients needs for benefits, counsels benefits recipients, performs assessments of clients strengths and needs to develop benefit plans, performs follow-up with clients to ensure they're working on their tasks.
Case Supervision	Supervises and manages caseworkers, helps caseworkers with any complex issues, handles case approvals and escalations, coordinates care and benefits with external service providers, assigns, or reassigns cases to caseworkers, conducts evaluations of benefits programs and provides feedback.

Resource Roles and Provisioning Rules for Service

Oracle provides resource roles for the Service offering which are used to provision the standard service job roles. Oracle also provides the role provisioning rules for these resource roles so that service users are automatically assigned the job and abstract roles they need.

These are the service role provisioning rules provided by Oracle, the condition that triggers the provisioning, and the job and abstract roles each rule provisions.

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned
Service Vice President	HR Assignment is Active Resource Role is Service Vice President	Customer Service Manager Resource
Service Administrator	HR Assignment is Active Resource Role is Service Administrator	Customer Relationship Management Application Administrator Resource
Service Manager	HR Assignment is Active Resource Role is Service Manager	Customer Service Manager Resource

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned
Service Representative	HR Assignment is Active Resource Role is Service Representative	Customer Service Representative Resource

Note: If you didn't use the Create Company Information quick setup task to set up your company information, then the predefined role provisioning rules aren't created; you must create the provisioning rules yourself. For information about creating provisioning rules, see the topic Create Rules to Automatically Provision Job Roles to Sales Users.

Visibility

How do I set up request visibility based on queue?

When users view lists of cases or create user-defined searches, access is based on the cumulative set of data security policies assigned to all the roles associated with them. You can restrict access based on their queue membership.

Restricting access ensures users see only the cases that are in their queue by completing the following processes in the Security Console:

- "Remove Data Security Policies from Users": If the users have been assigned other data security policies that grant them access to a larger set of cases, then you must remove such data security policies from the users.

- "Assign Data Security Policies Based on Queue": Grant queue-based visibility to cases for specific roles. This ensures that users with these specific roles can see only the cases assigned to the queues where they're a resource member.

Data Security

Remove Data Security Policies from Users

If your users have existing service duty roles and you don't want them to view all the cases that they can currently view, you must remove those data security policies from the users.

To remove the data security policies from your users:

1. Copy the predefined duty roles given to your users.

   For more information about copying roles, see "Copying and Editing Duty Roles" in the *Oracle Fusion Securing Sales and Service* guide.
2. Remove the data security policies that you don't want these users to have.

   For more information about removing or creating data security policies, see "Managing Data Security Policies" in the *Oracle Fusion Securing Sales and Service* guide.

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Related Topics

- Edit Data Security Policies on the Security Console
- Create Job and Abstract Roles
- Copy and Edit Duty Roles
- Copy Job or Abstract Roles

Assign Data Security Policies Based on BU

The predefined roles don't have case visibility based on business unit (BU).

To assign the data security policies based on BU to your users:

1. In the Security Console, create a new job role and click **Next**.

   For more information about creating or editing a job role, see "Creating Job or Abstract Roles" in the *Oracle Fusion Securing Sales and Service* guide.
2. For the new job role created in the previous step, create a new data security policy by specifying the following attributes:

   - Give an appropriate name to the policy.
   - Select the following Data Resource: **Cases** .
   - Select the following Data Set: **Select by instance set**.
   - Select the following data condition :

     - Stores Case object data such as title, description, status, type, priority and its related information such as resources, category, queue across its life cycle. Cases will be for party types Contacts, Accounts or Households
3. Select the appropriate actions. Typically, you must select all actions except **Delete**.
4. Click **OK** and continue to the Users section of the process for creating a job role.
5. Add the users to whom you want to assign this data security policy.
6. Save the job role.

Related Topics

- Edit Data Security Policies on the Security Console
- Create Job and Abstract Roles
- Copy and Edit Duty Roles
- Copy Job or Abstract Roles

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Read Only Access

How You Set Up a Role With Read-Only Access to a Case Header

Here's how you set up a role that has read-only access to a Case header, but still be able to add Case messages such as Customer Entry, Response, Forward to the SR.

To make the Case fields read-only for a user, remove the Edit Case privilege from the user and replace Service Request with Case.

> **Note:**
> - Making the data read-only in the subtabs such as Activities, Work Orders, and Action Plans isn't part of this topic.

Related Topics
- Create Job and Abstract Roles
- Copy and Edit Duty Roles
- Copy Job or Abstract Roles

How You Set Up a Role With Read-Only Access to Case Header and Case Messages

Here's how you set up a role that has read-only access to the case header and messages.

To make the header and messages read-only for a user, remove the following privileges from the user:

- Edit Case
- Compose Internal Note
- Forward Service Request

Related Topics
- Create Job and Abstract Roles
- Copy and Edit Duty Roles
- Copy Job or Abstract Roles

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4 Categories

Overview of Categories

Categories help identify the nature of issues reported in cases.

For example, you can create categories to help group cases related to disaster relief in one category, and cases related to family services in another category. You can then create further categories and child categories to narrow the type of cases within one of the ordered groupings.

Administrators can create categories and category hierarchies to group and organize cases depending on their organizational needs. Before creating categories, you must consider the following:

- Create a list of your top-level categories.

- For each top-level category, create a list of child categories.

Related Topics
- How do I manage categories?
- How do I update existing setup data?

How do I manage categories?

Categories can help identify the nature of issues reported in cases. For example, categories can help group cases related to disaster relief in one category, and cases related to family services in another category.

Further categories and child categories can then be created to narrow the type of case within one of the ordered groupings.

Administrators can create categories and category hierarchies to group and organize cases depending on their organizational needs. Before creating categories, it can be helpful to create a list of the top-level and child categories you need.

Note: By default, there's a limit of 1999 categories per business unit. If you require more categories, you can set the value in the ORA_SVC_RELAX_2K_LIMIT_FOR_CATEGORIES profile code to Yes.

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To create categories, do the following:

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

   ○ Offering: Service
   ○ Functional Area: Service Request
   ○ Task: Manage Service Request Categories

   The Service Request Categories page is displayed.

   Note:
   > ○ Click **Go to the new category setup and configuration page** to navigate to the Categories page within the user experience.
   > ○ You can also work with the Categories page within the user experience, by navigating to **Home > Service > Service Request Categories** (quick action). This page is extensible, so you can add custom fields. You can move child categories between different parents, and promote child categories to a parent level. Also, you can use different attributes to search the categories.

2. Create a top-level category:

   a. Click the **Create Category** drop-down list, and then select **Create Top-Level Category**.
   b. Enter a name in the **Category Name** field.
   c. Enter a unique **Category Code**. It must be unique across all business units (BUs) and application stripe.
   d. Specify if the category must be active, by selecting the **Active** checkbox.
   e. Click **Save**.
   f. From the **Business Unit Name** drop-down list, select the BU to which you want to associate the category.

      By default, the BU that's set in the scope is displayed. However, you can change the BU.
   g. Create extra top-level categories, as needed.

3. Create child categories:

   a. From the **Service Request Categories** list, select the top-level category for which you want to create child categories.
   b. Click the **Create Category** drop-down list, and then select **Create Child Category**.
   c. Enter a name in the **Category Name** field.
   d. Enter a unique **Category Code**. It must be unique across all BUs and application stripe.
   e. Specify if the category must be active, by selecting the **Active** checkbox.

      The **Business Unit Name** column displays the BU associated with the top-level category.
   f. Click **Save**.
   g. Create extra child categories, as needed.

      The child categories appear indented the top-level category.

Note: You can set the BU only for the top-level category. The BU on the child categories is automatically set based on the BU of the root category.

Translate Category Names into Installed Languages

You may want to display the names of categories in the language of your installation.

By default, these names are the same in the base language and in all the installed languages. However, these can be translated so you can provide language-specific category names in all the installed languages in the application.

To translate the category names into all the installed languages:

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

   - Offering: Service
   - Functional Area: Service Request
   - Task: Manage Service Request Categories

2. On the Service Request Categories page, in the **Category Name** column, select a category.
3. Click the Translation Editor.

   The **Edit Translations** window is displayed, showing different rows for the selected category name in the base language and the installed languages.

4. Click the row for the first installed language.

   Note: By default, the category name in all the installed languages is the same as that in the base language.

5. In the **Category Name** field, specify the selected category name in the corresponding installed language.
6. Click **OK**.
7. Starting from step 2, repeat all the steps for each category name.

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5 Work Assignment and Routing

Overview of Assignments, Mappings, and Rules

For more information about assignment mappings, assignment rules, and configuring assignment, see the following topics in the Oracle Fusion Cloud Sales Automation Implementing Sales guide:

Topic in the Oracle Fusion Cloud Sales Automation Implementing Sales guide	What the topic covers
Considerations for Configuring Assignment	• Phases of assignment • Setup tasks used for an assignment configuration • Assignment objects • Attributes • Mapping sets and mappings • Rule categories, rule sets, and rules
Assignment Mapping Set Components	How the mapping set components work together in assignment processing.
Examples of Creating Assignment Mappings	How to create different types of assignment mappings: attribute, dimension, and literal.
Assignment Rule Components	How the following assignment rules components work together: rule categories, rule sets, and rules.
Examples of Creating Assignment Rules	How to create assignment rules using rule sets, rules, conditions, and actions.

Related Topics

- Considerations for Configuring Assignment
- Assignment Mapping Set Components
- Examples of Creating Assignment Mappings
- Assignment Rule Components
- What types of assignment rules can I create?

Implementation Concepts for Work Assignment

What are work assignments?

You use the assignment engine to assign resources (for example, service personnel or territory owners) to the business objects they must work on, such as a . Being assigned to business objects gives resources and their manager's visibility into the business object.

You also use rule-based assignment to assign additional resources to objects.

Candidate and Work Objects

When setting up assignments, you must be familiar with two types of assignment objects: candidate objects and work objects.

- Work objects are the business objects that are assigned, for example, cases.

- Candidate objects are the possible pool of assignment candidates, for example, resources.

Rule-Based Assignment

Rule-based assignment lets you set up more rules that are used to assign resources to work objects. After you set up the rules containing the conditions that records must meet when resources match the rule conditions, they're assigned to the object.

For example, you use rules to assign a certain agent to a certain queue when the customer is in a specific state or region.

Rule-based assignment requires that you plan your rules, create the rules using the rules UI, and set profile options to configure the assignment behavior, in addition to any scheduled processes that must be run.

Assignment Profile Options

Each of the business objects available in assignment has its own set of profile options that enable you to further configure the application behavior.

Scheduled Processes

Scheduled processes are batch jobs that capture data and let business objects to act on that data. You must schedule several processes when using assignment. See the *Service Request Queue Assignment* topic in the Oracle Fusion Cloud Sales Understanding Scheduled Processes guide.

Assignment Reports

You use the Diagnostic Dashboard to generate reports about the assigned objects and the volume of territory data involved in assignment.

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Assignment Resources

To learn more about assignment, see the following resources:

- Online help: Use the keyword **assignment** to search for the relevant topics.

- Assignment Resource Center: See the Assignment Manager Resource Center page on My Oracle Support (Doc ID 1522958.1) for more resources.

Assignment Mappings

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.

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Points to Consider to Export and Import Setup Data

Based on your implementation, you can follow different approaches while exporting and importing assignment setup data.

Consider the following points:

- Because your implementation is using rule-based assignment, the implementation project must include both the Assignment Objects and Assignment Rules setup tasks.

- Retain the default sequence for the tasks and business objects.

The application lets you delete assignment objects, assignment attributes, rule categories, rule sets, rules, and conditions in an environment, for example test. If that setup data is exported, and then imported into another environment, for example production, the data in the target database isn't removed.

If your implementation plans to import and export setup data for assignment objects and assignment rules, ensure not to delete assignment objects, rule categories, rule sets, and rules. Set them to inactive in case you want to delete them. Additionally, don't delete assignment rule conditions. Instead, set the rule to inactive and then recreate the rule excluding the condition that's no longer needed.

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

Assignment Rules

How You Define Queue Assignment Rules

You can use assignment rules to automatically assign cases to queues when the cases are created or updated. And these assignment rules can be run on a schedule.

Cases are treated as work objects and queues are treated as candidate objects. You can define your rules to select the best candidate (queue) for each work object (case).

> **Note:** Case assignment rules are defined using rule-based assignment. Territory-based assignment doesn't apply to Cases.

Defining Case assignment rules requires some forethought. Consider the following before you define these rules:

- The attributes of queues that you want to use as criteria for your rule assignments.

- The attributes of Cases that you want to use as criteria for your rule assignments.

- The rule sets you want to create.

- The rules to include in each rule set.

> **Note:** You must define queue candidate objects before you start defining rules for Case assignment objects.

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Related Topics
- Assignment Rule Components
- Update Existing Setup Data
- Create a Queue
- What happens when I change queue properties?

How do I manage assignment objects?

You need to select attributes from the case 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 Case Queue Assignment process can't run successfully. But you can add new attributes or new child entities for the objects.

(Optional) To manage assignment objects:

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

    - Offering: Service
    - Functional Area: Communication Channels
    - 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 case attributes that you want to be available when setting up your rules:

    a. Click **Case** .
    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.

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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 case.

- 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 *Service Request Severity Equals High*, 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 *Service Request Severity Does not equal High*, 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 *Service Request Problem type Code In Docs, Product*, 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 *Service Request Product Group In including children Apple*, 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.
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.	Single or Multiple	Yes	If the rule condition is set as *Service Request Product Group Not in including children iPad*, an SR with the Product Group value of iPad or any of its children, such as iPad1 or

Operator	Description	Value	Used in hierarchy?	Example
	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.			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 *Service Request Problem Type Code Not in Docs, Product*, 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 *Service Request Internal Priority Code Is blank*, 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 *Service Request Account Is not blank,* 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:

   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Service Assignment Rules

2. On the Manage Service Assignment Rules page, select a **Category** based on the following.

   - **Generic Queuing Rules**: Rules set for all types of work items.
   - **HR Service Request Queuing Rules**: Rules set for HR Help Desk SR.
   - **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**.

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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 set queue assignment rules?

You can create assignment rules by using rule sets, rules, conditions, and actions.

The assignment engine uses your rules to evaluate and recommend candidate assignments for specified work objects.For example, you can assign all Cases with a certain case type to one queue, or you can assign a Case to a critical queue if the priority of the Case is high.

> **Note:** A particular work item can be assigned only to a single queue. So it's good to be careful while defining rules. You can't define different rules that assign the same work item to different queues.

To create a service assignment rule:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Service Assignment Rules
2. On the Manage Service Assignment Rules page, select from the **Category** drop-down list:
   - **Case Queuing Rules**
3. Do one of the following:
   - Create a rule set by clicking the **Plus** icon and specifying the required values.
   - Select an existing rule set.
4. Create a rule within the rule set by completing the following steps:
   a. Click the **Plus** icon in the **Rule set: Rules** region.
   b. On the Create Rule page, specify a rule name.
   c. (Optional) Specify a description, an effective start date, and an end date for the rule.

      If you don't select an effective start date and end date, the rule comes into immediate effect and lasts indefinitely.

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    d. (Optional) Select the Inactive option if you want to enable the rule at a later date.

> **Note:** You can create multiple rules within a rule set.

5. Specify an assignment condition as described later in this topic, in the "Specify a Condition and an Action" section.

    This assignment condition is evaluated before a rule-based assignment is made.

6. Select a queue to which a case is assigned if the condition is met.

Specify a Condition and an Action

After specifying the rule details, specify one or more conditions and select a queue to which the Case is assigned, if the condition is satisfied. When the specified condition is satisfied, the Case is assigned to a queue. For example: If the priority of the Case is equal to High, assign the Case to the Critical_Queue.

To specify a condition and an action:

1. Select an option from the **Rule Applies If** drop-down list.

    You can choose to perform the action if all of the conditions are met or if one of the conditions is met.

2. Click the **Plus** icon to add a condition.

    > **Note:** If you don't add a condition, all your work items are assigned to the queue that you add in step 4.

3. Select the object, an attribute, an operator for the condition, and a value.

    For example, **Case** is the object, **Priority** is the attribute of the object, **Equals** is the condition, and **High** is the value. Hence, the condition is **If Case Priority is equal to High**.

4. Add an action to be performed when the condition is satisfied. Click the **Plus** icon to select and add a queue.

    > **CAUTION:** Oracle recommends that you always add an action. If you don't add an action, the assignment engine acts unpredictably and you may face issues in the assignment of work items to queues.

5. Search for a queue, select the required queue from the list, and click **Done** to add the queue to the action.

6. Click **Save and Close**.

Related Topics
- How do I update existing setup data?

Tips for Creating Assignment Rules and Rule Sets

Summary of Tips for Creating Assignment Rules and Rule Sets

To maximize the effectiveness of your assignment rules, Oracle recommends that you follow these tips while creating them. Each of them is described in detail in separate topics:

- Add a condition and an action for every rule.

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- Create unique rules.

- Create minimum number of rule sets.

- Publish rules after you rename them.

- Set incomplete rules and rule sets to inactive.

Add a Condition and an Action for Every Rule

It's important to remember that you always add a condition and an action for every rule. Any rule without a condition or action can lead to unpredictable results.

- If you don't add a condition, any work item will match this rule. This type of rule will conflict with other well-defined rules. This situation results in a work item matching multiple rules, so it's randomly assigned to any queue that matches any of these rules.

- Add an action to be performed when the condition is satisfied. You add a queue as part of the action. If you don't add an action, the Assignment Manager acts unpredictably and you may face issues in the assignment of work items to queues.

Note: Some examples of incomplete rules that you must avoid:
  - If no condition, then assign the work item to the Q1 queue.

  - If severity of the work item is high, then you don't specify any queue.

For more information, see Set Rules for Queue Assignment.

Related Topics
- How do I set queue assignment rules?

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.

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> **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.

Create Minimum Number of Rule Sets

The Assignment Manager is designed to return only one queue for every work item.

If two rules from different rule sets match a work item, then the Assignment Manager randomly picks between the rules. So the work item may not be assigned to the queue that you would want. To avoid such situations, it's good to have only one rule set if possible. And you can apply scoring for the rules if required. That way, only one rule matches a work item. Regardless of the company size, Oracle recommends deploying only one rule set.

> **Note:** You can still have multiple rule sets if you ensure that the rules within these rule sets are all unique. And within each rule set, you can have scoring for the rules. But if you have the same or similar rule in different rule sets, two rules from different rule sets can match the same work item.

Here's what the Assignment Manager does when you have multiple rule sets:

1. The Assignment Manager checks all rule sets. In one round of assignment, it checks all the rules under Rule Set 1, all the rules under Rule Set 2, and so on.
2. It finds some matching rules. Let's say the matching rules are Q1 and Q2 under Rule Set 1, and Q3 under Rule Set 2.
3. It randomly picks a rule among Q1, Q2, and Q3.

> **Note:** You must not create more than the maximum limit of 500 rule sets. The Assignment Manager selects only 500 rule sets alphabetically to process them. But within every rule set, you can have any number of rules. An upper limit doesn't apply to the number of rules.

Publish Rules After You Rename Them

Oracle recommends that whenever you rename a rule, you must publish it immediately.

Let's say you create or rename a rule, and you don't publish it immediately. Sometimes, another administrator may delete it or create another rule with the same name. This causes confusion for the Assignment Manager while publishing. For the same reason, you must also avoid renaming a rule and deleting a rule in the same operation. You must publish the rule after every individual operation.

Set Incomplete Rules and Rule Sets to Inactive

You must set any incomplete rules or rule sets to inactive. While creating a rule or rule set, you must set the initial status to inactive.

This way, you avoid the risk of incomplete rules being published. You must first complete adding all the conditions and actions to a rule. After that's done and you're confident that the queue works as required, you can set it to active and publish it.

Here's why you must be careful. Suppose you created a rule and saved it, but you couldn't complete the rule for some reason. So you may not have added a condition and action to determine the queue for assignment. And let's say another administrator publishes the rules. Whenever any administrator publishes the rules, all active rules and rule sets that are saved until then are published, irrespective of who has created them. Incomplete rules that are set to active status are also published. When this happens, the Assignment Manager may pick a rule other than what you would prefer.

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6 Action Plans

Set Up Action Plans

What are action plans?

Action plans are used to complete a series of steps or a sequence of events to resolve different types of requests.

You can associate action plans to cases if you need to complete a series of steps or a sequence of events to resolve the case.

You can attach action plans to a many objects, such as cases using an administrator-defined template, or by adding individual actions. Actions can be required or optional tasks, activities, or appointments, or service requests , or other cases.

Be careful about spacing. This is the Case condition. You must remember that each conditioned sentence or phrase won't show in certain output. Here's what I mean.

You can add Action Plans to the following objects:

- Service Requests
- Cases

Agents can add either solo actions, or action plans. Actions can be required or optional tasks, activities, or appointments.

- **Solo Actions** are individual actions added to an object.
- **Action Plans** are added from an administrator-defined template. Action plans are made up of multiple actions.

By using actions and plans, users have:

- A visual aid to see the progress of a solo action or an action plan
- Any warnings on actions or plans

To use the Action Plans feature, set up actions, templates, and categories in Setup and Maintenance.

In Setup and Maintenance, navigate to Service > Action Plan. If Action Plan isn't displayed, use the **Change Feature Opt In** to activate Action Plans.

The following table shows the name and description of each action plan setup task.

Task	Description	Required
Manage Action Plan Profile Options	Manage profile options for the Action Plans feature.	Yes
Manage Action Plan Actions	Create actions that can be used for solo actions or in action templates. You can specify the category, type, duration, and visibility for each action.	Yes

Task	Description	Required
Manage Action Plan Templates	Create templates to group similar actions to be added to an action plan.	Yes
Manage Action Categories for Action Plans	Action categories are used to facilitate finding actions to add to templates or directly to an action plan.	No
Manage Template Categories for Action Plans	Template categories are used by agents to filter and find templates to apply to an action plan.	No
Manage Mapping of Action Plan Status Values	Manage the global setup for status configuration. You can map task, appointment, or request attributes to an action status at a global level. Action status mapping can also be done at the individual action level.	No
Manage Process Integration for Action Plans	Configure the authentication from Fusion Service to your Process Automation instance. **Note:** Used for the Run Process through Action Plans feature. A subscription to Oracle Process Automation is required in order to take advantage of this feature.	No
Manage Action Plan Process Metadata	Manage the action plan process metadata. **Note:** Used for the Run Process through Action Plans feature. A subscription to Oracle Process Automation is required in order to take advantage of this feature.	No

Related Topics

- How do I manage action plan actions?
- How do I manage Action Plan templates?
- Map Action Plan Status Values

Manage Action Plan Profile Options

The following are the available action plan profile options and their descriptions.

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Manage the Action Plan profile options in Setup and Maintenance. Navigate to:

- Offering: Service
- Functional Area: Action Plans
- Task: Manage Action Plan Profile Options

The following table shows the action plan profile options and their descriptions.

Profile Option	Description
SVC_ENABLE_ACTION_PLAN	Specify if Action Plan is enabled for cases.
SVC_ENABLE_SUBSCRIPTION_ SCHEDULES_IN_ACTION_PLANS	Enable calculation for action plan estimated completion times based on schedules defined in Subscription Cloud. **Note:** If you don't set this profile option, contract schedules are used. Oracle recommends using subscription schedules. If an action plan template doesn't have an explicitly assigned valid subscription schedule, then SVC_ DEFAULT_CRM_CALENDAR/SVC_DEFAULT_HCM_CALENDAR profile options are used to specify a default contract schedule to use as a calendar. If SVC_DEFAULT_CRM_CALENDAR/SVC_DEFAULT_HCM_CALENDAR aren't set, a 24/7 schedule is used by default to perform any date computations.
ORA_SVC_DEFAULT_SUBSCRIPTION_ SCHEDULE	Specifies a default subscription schedule to use as a calendar if subscription schedules are enabled (profile option SVC_ENABLE_SUBSCRIPTION_SCHEDULES_IN_ACTION_PLANS = Y) and the action plan template doesn't have an explicitly assigned subscription schedule. **Note:** If an action plan template doesn't have an explicitly assigned valid subscription schedule, then a 24/7 schedule is used by default to perform any date computations.
ORA_SVC_AP_PROCESS_METADATA_ VALIDATION_ENABLED	Enable the validation of process metadata in action plan. Use this profile option to validate the process being associated to an action when a dynamic process action is created or updated in a REST request. **Note:** Used for the Run Process through Action Plans feature. A subscription to Oracle Process Automation is required in order to take advantage of this feature.
ORA_SVC_AP_DEFAULT_OBJECT_LINK_ TYPE	The Object Link Type used when Object Links are created by Actions and Plans.
ORA_SVC_AP_ENABLE_OBJECT_LINK	Enable the creation of object links between supported objects in actions and plans.

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How do I manage relationships for action plans?

Action plans can have relationships to other objects. For example, an action can be blocked by another object, or a duplicate of another object.

About Relationships

Agents can create business-driven relationships between cases and leverage them to make updates across SRs cases. You must enable this feature in Functional Setup Manager.

Enable Relationships

To enable the Relationships feature:

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

- Offering: Service
- Functional Area: Action Plans
- Task: Manage Action Plan Profile Options

1. Select the profile value **ORA_SVC_AP_ENABLE_OBJECT_LINK**.
2. In the drop-down list of the value, select Yes.
3. Click **Save and Close**.

Now, you can set the type of object link that's used for the relationship. For example, blocked, or duplicate.

1. Click the profile value **ORA_SVC_AP_DEFAULT_OBJECT_LINK_TYPE**.
2. Select the relationship type from the Profile Value drop-down list.
3. Click the **Add (+)** icon to continue adding the relationship types you want to use.
4. When you have finished, click **Save and Close**.
5. Click **Done**.

Manage Link Types

You can manage link types in the Manage Object Link Types task.

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

- Offering: Service
- Functional Area: Service Request
- Task: Manage Object Link Types

To edit or disable the predefined object link type:

1. Click the link type in the list.
2. Make your changes. To disable, deselect the disable check box.
3. Click **Save and Close**.

To create a link type:

1. Click **Create Link Type**.

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2. Enter all the required information:

   ○ Name

   ○ Short Name

   ○ Outward Value

   ○ Inward Value

3. Select the check box to enable the type.
4. Click **Save and Close**.

How do I manage action plan actions?

Use the Manage Action Plan Actions task to create and edit actions for action templates or individual actions used in cases. In this task, you specify the category, type, duration, visibility, and attribute mappings for each action.

To manage action plan actions, in the Setup and Maintenance work area go to the following:

- Offering: Service

- Functional Area: Action Plan

- Task: Manage Action Plan Actions

Create a New Action

Here's how to create a new action:

1. Click **Create Action**.
2. Enter the action name.
3. If you enabled business units for service requests for help desk requests or stripe codes, use the drop-down lists to select the stripe code and BU.
4. Select **Category**.

   Select **Class**.
5. Select the **Action Type**.

   Depending on the Fusion Service features you're using, Action types can include:

   ○ Appointment

   ○ Article

   > **Note:** You can create an Action of type Article. You must select Stripe Code of the action and then select Sub Type of the action. The Attribute Mapping section must be populated as it's required for any other type of actions.

   ○ Case

   ○ Dynamic Process

   ○ HR Help Desk Request (If you're using the Help Desk Offering)

   ○ Internal Service Request (If you're using the Help Desk Offering)

   ○ Opportunity (If you're using the Sales offering)

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> o Service Request

> o Task

Follow the next four steps if you're creating a Dynamic Process Action (with the Run Processes Through Action Plans feature). If you aren't using this feature, you can skip the next four steps.

6. Click the **Edit** icon in the **Process Name** field.

7. Search for and select the process you want to add to the action.

Processes must already be created in Oracle Process Cloud and your connections to Oracle Process Cloud must be working.

Also, the administrator must be added to the Process Application Administrator role in the process workspace UI so they can see all processes.

> **Note:** When you create processes, you must define the following case-sensitive input parameters - objectNumber, objectType, actionPlanId, actionPlanActionId, and processParentObjectType when configuring dynamic processes. For Solo Actions, input parameter `processParentObjectType` will have value `'ActionPlan'` while for Plan based actions it will have `'ActionPlanAction'`.

8. Click **OK**.

9. Select to use the default version of the process, if you want to use the default process version instead of the version-specific process.

> **CAUTION:** After a process is deployed, overriding it will remove all running instances. Oracle recommends that you create a new version for more changes and mark it as default, if it's required. An action which has **Use default version** selected will ensure that only the default version in Oracle Process Automation is used to create process instances. For processes whose inputs are form based, make sure the interface argument is the same.

10. Select the **Action Visibility**.

    Visibility options include:

    > o Not Published - Only visible to the administrator. The action isn't available to add to a template and can't be added by an agent as an another action.

    > o Customer Visible - Optional. Used only for user interface configurations to display or hide Actions.

    > o Internal Only - Visible internally only.

11. Enter a context for the action.

    Context options include:

    > o Opportunity

    > o Service Request

    > o Internal Help Desk Request

    > o HR Help Desk Request

    > o Case

12. Enter a numeric value for the **Duration** of how long the task should take. Select a unit of measure for the numeric value (days, hours, or minutes).

13. Select a **Stripe Code** (CRM, HCM, ISR, or HRSR) from the drop-down list.

> **Note:** If you select the type as SR, you shouldn't select stripe as ISR/HRHD. This leads to ambiguity whether the underlying object created should be CRM SR or ISR/HRHD.
> - If the agent wants the associated object to be CRM SR, select the following:
>   - Type: SR
>   - Stripe: ORA_SVC_CRM
> - If the agent wants the associated object to be ISR, select the following:
>   - Type: ISR
>   - Stripe: ORA_SVC_ISR
> - If the agent wants the associated object to be HRHD, select the following:
>   - Type: HRHD
>   - Stripe: ORA_SVC_HRHD

14. Select a **Category** from the drop-down list.
15. You can define a specific relationship to be created for the action by selecting an **Object Link Type** from the drop-down list. If you don't select a specific object link type, the global setting is used.
16. Check the Copy Attachments check box if you want all attachments to be copied from the context object to the target object. You can select to copy all attachments for the following object types:
    - Cases
    - Service Requests
    - Help Desk Requests
    - Internal Service Requests
17. Enter a description of the action and any pertinent details.
18. If necessary, make edits on the **Attribute Mapping** or **Status Mapping** tabs. These are explained next.
19. Click **Save and Close**.

Attribute Mapping Tab

Every action in an action plan has a related object (as in a task, appointment, opportunity, case, or service request) that's automatically created when the action starts.

The attribute mapping tab is where you set up the mapping of information from the action, parent case, and user-defined values into the related object when it's created.

> **Note:** There are no attributes to map for Dynamic Processes. If you're creating a Dynamic Process Action, there isn't anything to do on this tab.

Mapped attributes come from the fields in the related object. Required attributes are automatically listed, and you can add optional attributes. The **Mapped To** column shows where the information comes from that populates the field on the related object.

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> **CAUTION:** If you map attributes incorrectly, the creation of the business objects during orchestration in Action Plans will fail.

Required fields are shown in the **Required** column. Additional fields might also be listed that can't be changed. For example, Activity Type displays Task if that action type is Task or defaults to Appointment if the action type is Appointment.

Here's how you add an attribute mapping:

1. Click the **Add** icon.
2. Select the field to be populated from the **Attribute** choice list.
3. In the **Mapped To** column, select from where the fields must be populated. Choices are: service request, action, or a user-defined value.
4. Depending on the attribute you selected in the previous step, enter free-form text to the box for free-form values. For service request or action, select the field from the choice list in the last column.

For more information about mappings for an article, see the topic Attribute Mappings for Knowledge Articles in this chapter.

Status Mapping Tab

The related business objects created for actions can have different user-defined status values. However, they must be mapped into a new set of status codes for an action in an action plan. You can do this at a global level for all actions, or individually for one action if it has unique attributes. When a user updates an object, the status mapping rules decide how the status of an action updates on an action plan. For example, when a task is set to closed or completed, then the action status is completed.

> **Note:** If you don't define the status mapping at the action level, then the default is the global status mapping. Also, there are no statuses to map for Dynamic Processes. If you're creating a Dynamic Process Action, there isn't anything to do on this tab. There are however, predefined status value mappings that can't be changed.

For more information about the global action status configuration, see the topic Manage Mapping of Action Plan Status Values.

The following table shows the predefined Process Automation status values that are mapped with Action Plan status values.

Process State	Action Status
Active	ORA_SVC_IN_PROCESS
Completed	ORA_SVC_COMPLETED
Terminated	ORA_SVC_COMPLETED
Closed	ORA_SVC_COMPLETED

For more information about the global action status configuration, see topic Manage Mapping of Action Plan Status Values.

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You can use the **Status Mapping** tab on an action to override the global status mappings. For example, if the global rule is set to an action being closed when the status is complete, but instead you want it to be closed when it's canceled, you can override the global mapping so that the action closes when both conditions are met.

1. Click the **Status Mapping** tab.
2. Click the **Add** icon.
3. Select a status from the **Status** choice list. This becomes the status that ends up on the action.

   Status options include:

   - Blocked
   - Completed
   - In progress

   | **Note:** Apart from these three status values, you should not set up rules for any other status.

4. Select an attribute from the choice list.
5. Select an operator.

   Operators include:

   - Contains
   - Equals
   - `Is null`
   - `Is not null`

6. Select a value for the status.

Example of a Status Mapping

Let's say you want an action to be marked completed when a service request's status is completed or canceled.

The following table shows the values to enter on the Status Mapping tab.

Column	Value
Status This is the status you want the action to be.	Completed
Attribute This attribute comes from the SR.	Status
Operator	is one of
Value This is the request's status. You can select multiple values from the list.	Completed, Canceled

Dependencies Tab

When an action is added to a template, the **Dependencies** tab shows the template name. You use this to know what templates are impacted by a change to an action. If the action is in a template, you can also view and edit the template from this tab.

> **Note:** Edits made to templates don't affect active action plans that use the template.

Action Errors Tab

The **Action Errors** tab lets you to recreate actions for users when there are errors in action attribute mapping. For example, if the attribute in an attribute mapping is mapped incorrectly, the **Action Errors** tab is displayed. From the tab, you can see all the action plans that the action is used in, and after they're fixed, the action plan actions can be recreated directly from this tab.

This tab isn't used for Dynamic Process actions.

The Action Errors tab shows a table with the action plan number, action plan name, and the status details of the action.

Review the attribute mappings the action and correct the error. After attribute mapping for the action is corrected, you can return to the **Action Errors** tab and click **Recreate**.

Edit an Existing Action

To edit an existing action:

1. In the **Manage Action Plan Actions** task, select the template you want to edit.
2. Edit the action.
3. Click **Save and Close**.

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 a case.

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.

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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:

    o Article

    o Case

    o HR Help Desk Request (If you're using the Help Desk offering)

    o Internal Service Request (If you're using the Help Desk offering)

    o Opportunity (If you're using the Sales offering)

    o 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.

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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 manage action plan actions?
- How do I update existing setup data?
- How do I create a coverage schedule?

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Map Action Plan Status Values

Use the Manage Mapping of Action Plan Status task to create or edit global status mappings from related action business objects to an action plan.

The global mapping can be overridden at the individual action level. For example, you can set an action status as complete when the related case status is resolved or closed.

To manage mapping of action plan statuses, in the Setup and Maintenance work area, go to the following:

- Offering: Service
- Functional Area: Action Plan
- Task: Manage Mapping of Action Plan Status Values

On the Action Status Configuration page, select from the following action types.

- Appointment
- Case
- HR Help Desk Request
- Internal Service Request
- Opportunity
- Service Request
- Task

You can edit the existing status, or click the **Add** icon to add additional status configurations.

> **Note:** When assigning user-defined values, you can enter any value as a user defined value during attribute mapping. There's no validation performed on that value.

Related Topics
- What are action plans?
- How do I manage action plan actions?
- Overview of Opportunities

Use Oracle Process Automation with Action Plans

Overview of Using Oracle Process Automation with Actions and Plans

You can use Oracle Process Automation with the Action Plans feature to design processes that:

- Automate your Actions and Plans. You can add automated steps to your Actions and Plans based on conditions you create in Oracle Process Automation.
- Leverage Oracle Process Automation capabilities to:
  - Connect to any system over REST APIs
  - Implement workflow into your actions and plans

The topics in this section take you through the process of enabling and configuring the Run Processes through Action Plans feature.

Note: A subscription to Oracle Process Automation is required in order to take advantage of this feature.

Configure Oracle Identity Cloud Service and Oracle Process Automation

To access the Oracle Process Automation Designer, Workspace, and REST APIs, you must first enable user synchronization in IDCS and assign user roles.

See the steps in the topic Use Oracle Process Automation with Fusion-Based Oracle Cloud Applications in the Using Oracle Process Automation guide.

As an IDCS administrator, make the following role assignments:

- Assign the Service Administrator role to the following groups:
  - Sales Administrator
  - Case Worker
  - Human Resource Help Desk Agent (if using the Help Desk product)
  - Internal Help Desk Manager (if using the Help Desk product)

- Assign the Service Developer role to the following groups:
  - Customer Service Representative
  - Case Worker
  - Human Resource Help Desk Agent (if using the Help Desk product)
  - Internal Help Desk Agent (if using the Help Desk product)

In the Oracle Process Automation Workspace add the following groups to the Oracle Process Application Administrator Global role:

- Sales Administrator
- Case Worker
- Human Resources Help Desk Agent (if using the Help Desk product)
- Internal Help Desk Manager (if using the Help Desk product)

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Configure Oracle Process Automation with Oracle Fusion Service

Enable the Run Processes through Action Plans Feature

You can use Oracle Process Automation in Actions and Plans in Fusion Sales and Service version 21.04 or later.

To enable the feature, go to Setup and Maintenance and do the following:

1. Go to the Service offering.
2. Click **Change Feature Opt In**.
3. If it's not already done, select the **Enable** check box for Action Plans.
4. Click the **Edit** icon for Action Plan **Features**.
5. Select the **Enable** check box for Run Processes through Action Plans.
6. Click **Done**.
7. Click **Done** on the Opt In page.

Ensure all users of your process-based Actions and Plans have:

- The SVC_ACTION_PLAN_PROCESS_PRIV privilege provisioned in Sales and Service.

- The required permissions to view and edit their processes in Process Automation.

Manage Oracle Process Automation Integration

To configure authentication from Oracle to the Oracle Process Automation instance:

1. In Setup and Maintenance, go to the following:
   - Offering: Service

   - Functional Area: Action Plans

   - Task: Manage Process Integration for Action Plans

   The Configure Process Integration for Action Plan page displays. This is where you add the proxy user who initiates processes for jobs.
2. Enter the credentials for a user who has the Process Application Administrator role in Oracle Process Automation.
3. Click **Save**.

   If successful, the following confirmation messages display.
   - Process credentials saved.

   - Process credential validation is successful.
4. Once credentials save and successfully validate, click **Save and Close**.

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Manage Action Plan Process Metadata

With this task, you can see what current processes are available to be mapped to actions.

In Setup and Maintenance, go to the following:

- Offering: Service

- Functional Area: Action Plans

- Task: Manage Action Plan Process Metadata

In the Process Metadata page, enter search criteria and click the **Search** icon.

There's no action needed for this page. This is a read-only list of processes where you can see all processes by name, their versions and which versions are the default.

Export and Import Action and Plan Configurations

If you need to, you can export and import action plan configurations from you test environment to your production environment.

For export and import of Actions and Plans, refer to *Import Your Action Plan Data* in the *Oracle Fusion Understanding Import and Export Management for Sales and Service* guide.

For export and import of Process Automation processes, refer to the *Process Automation documentation*.

Related Topics
- Import Your Action Plan Action Data

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7 Adaptive Search

How do I use Adaptive Search for Case Management?

Adaptive Search is a high-performance search engine that provides keyword searching and enhanced filtering capabilities. Adaptive search is used on the Case List pages. To enable Adaptive Search for Cases, complete the following procedure:

Before you start

You must have the Application Implementation Consultant job role to complete the setup.

1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:

   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Configure Adaptive Search

2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select the case object to enable for Adaptive Search
4. Click **Publish**.

   Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the Monitor tab. The process can take several minutes to complete, depending on your data volume.

5. Click the **Monitor** tab and **Publish** subtab to monitor the process. If the process completes with errors, contact your help desk.

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8 Set Up Business Units

How are business units for set up for Service and Help Desk?

With business units (BUs), you can deploy more than one service center within a single instance of your service or help desk application. This topic gives an overview of the steps that you must perform to complete the business units setup.

You can use multiple BUs in the following ways:

- Segment SRs between BUs so that users can search and identify SRs from multiple BUs.
- Use product catalogs, categories, channels, and email templates specific to a BU.
- Assign SRs to queues by writing rules based on BU.
- Create service request BI reports specific to a BU.

Currently, the following objects aren't supported by multiple BUs in Service: accounts and contacts, users, resources, and lookups.

To set up business units in Service, you must perform the following tasks in the given order.

Step	Description
Setting Up Business Units for Service	Add the Manage Business Unit functional area to the Service offering by using the **Change Feature Opt In** link in Setup and Maintenance.
Manage Common Profile Options	Set the profile options to enable the multiple-BU functionality in the Manage Common CRM Business Unit Profile Options task.
Manage Internal Resource Organizations	Define internal resource organizations to be associated with the BU.
Manage Resource Organization Hierarchies	Add the internal resource organizations to the internal resource organization hierarchy.
Create Business Unit	Create a BU to be associated with the resource organization in the Manage Business Unit Task.
Associate Resource Organization to Business Unit	Associate the internal resource organization to the BU you created. Use the Resource Directory.
Create Employees	Add users to the organization in the Users, Roles and Delegations task, and make one of the resources a manager for the organization.
Reset Passwords for Users	Reset the password for the users.

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Step	Description
Set the Scope in Service Setup Tasks and complete Service Setup tasks.	Set the scope for Service tasks and set up the remainder of the Service offering.
Add additional BU fields in the SR if users are associated with multiple BUs.	Change the layouts of the SR pages if required. Use Application Composer to include multiple BU fields in the SRs. **Note:** Only required if a user is associated with multiple business units.
Configure Multiple Business Units with Digital Customer Service	If you implement multiple business units for Digital Customer Service, you must complete some additional configuration.

How do I enable multiple Business Units Fusion Service?

To enable multiple business units (BUs) for , 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:

   - Offering: Service
   - Functional Area: Company Profile
   - 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**.

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Manage Internal Resource Organizations for Service BUs

For every business unit (BU) that you set up, you can define internal resource organizations to be associated with the BU.

A resource organization represents the internal organization and structure for the business unit. Resource organizations are hierarchically structured, and the organization hierarchy helps to derive the reporting relationships.

To define the internal resource organization for a Service BU:

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

   - Offering: Service

   - Functional Area: Users and Security

   - Task: Manage Internal Resource Organizations

2. Click **Create** to add a new resource organization.
3. Select the **Option 2: Create New Organization** option to create a new organization.
4. Click **Next**.
5. On the Create Organization: Enter Basic Information page, enter a **Name** for the organization.
6. In the Organization Usages region, click **Add Row**.
7. From the **Usage** drop-down list, select **Service Organization**.
8. Click **Finish**.

Related Topics
- How do I update existing setup data?
- Set Up an Offering with Scope

Manage Resource Organization Hierarchies for Service BUs

After you define internal resource organizations to be associated with business units (BUs), you must add them to the internal resource organization hierarchy. A resource organization hierarchy is a hierarchically structured representation of the way resources are grouped within a resource organization.

To add internal resource organizations to the resource organization hierarchy:

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

   - Offering: Service

   - Functional Area: Users and Security

   - Task: Manage Resource Organization Hierarchies

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2. In the Manage Resource Organization Hierarchies page, search for the resource organization that you created in the "Manage Internal Resource Organizations for Service BUs" procedure.
3. Click the link for the resource organization that you want to edit.
4. Select **Edit This Hierarchy Version** from the **Actions** menu.
5. Expand the organization list in the **Internal Resource Organization Hierarchy** region.
6. Select the organization that you created in the "Manage Internal Resource Organizations for Service BUs" procedure, to add it to the organization hierarchy.
7. Click **Add**.
8. In the **Add Tree Node** window, click **Search**.
9. In the **Search Node** window, search for the organization that you created in the **Manage Internal Resource Organizations** task.
10. Click **OK** to add the organization.

   To add more organizations, select the parent node to add a child node. Repeat the steps to search and add as many times as needed.
11. Click **Save and Close**.
12. Click **Yes** on the warning message, which states that the hierarchy version is to be updated and the corresponding reporting hierarchy regenerated.

Related Topics
- How do I update existing setup data?
- Set Up an Offering with Scope

Create a Business Unit for Service

You can use a business unit (BU) to separate or share the following:

- Service setup data such as product catalog
- Transactional data such as service requests

To support the multiple-BU features, you must first create the required BUs.

To create a BU for the Service offering:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Company Profile
   - Task: Manage Business Unit
2. In the Manage Business Unit page, click **Create**.
3. In the Create Business Unit page, enter a name for the BU.
4. In the **Default Set** drop-down list, click **Search**.
5. In the **Reference Data Set Name** field, search for **Common**.
6. Select **COMMON** from the search results.
7. Click **OK**.
8. On the Create Business Unit page, click **Save and Close**.

   To add another BU, select the **Manage Business Unit** task again and repeat the steps.

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Associate Resource Organizations with Business Units

You can associate a resource organization with multiple business units (BUs). By associating resource organizations with BUs, you can control access to the transactional data available to service resources in business objects such as service requests.

Note: If you enable multiple BUs, ensure that each user is associated with a resource organization, and the resource organization is associated with one or more BUs. Otherwise, the default BU set on the HZ_DEFAULT_BU_CRM profile option is associated with SRs.

To associate a resource organization with business units:

1. Sign in to the application as an administrator or a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the Tasks panel tab.
4. In the Resource Organizations region, click **View Organizations**.
5. On the View Organizations page, search for the organization that you created.
6. In the Search Results region, click the link for the organization.
7. Select the Business Units tab.
8. Click **Add Row**.
9. Select the business unit from the drop-down list.

   Note: The first BU with which you associate the resource organization becomes the primary BU. If you associate the organization with more BUs, you can change the primary BU as required.

10. To add more business units, click **Save**, and then click **Add Row**.
11. After you add the business units, click **Save and Close**.
12. Click **Done**.

Create Employees for a Service BU

You can add resources to the resource organizations that you associate with business units (BUs). When you add a resource to an organization, the resource becomes a member of the organization and a part of the organization hierarchy.

You must first create a manager for the organization. To create application users, use the Users and Roles task:

1. Sign in to the application as an administrator or a setup user.
2. In the navigator, select **Users and Roles**.
3. On the Search Person page, click **Create**.
4. On the Create User page, enter the **Last Name** and **First Name**.

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5. Enter the **Email**.

6. In the **User Details** region, enter a **User Name**.

7. In the **Employment Information** region, select **Employee** from the **Person Type** drop-down list.

8. Select a **Legal Employer** from the drop-down list.

9. Select the **Business Unit** of the employee from the drop-down list.

   > **Note:** This BU that you select is the BU of the employee, and not the BU of the resource organization. They both may be different. What BU you select for the employee information depends on how employees are organized.

10. In the **Resource Information** region, select the **Resource Role** from the drop-down list.

11. Search for and select an organization from the **Organization** drop-down list.

    This organization is the one that you created earlier. The agent is associated with the BU through this organization.

12. Click **Autoprovision Roles**. This gives the user any predefined job roles.

13. Click **Save and Close**.

    Repeat the steps to create another user who is the employee of the manager. The steps are the same except that in the Resource Information region, you search for and add the Reporting Manager that you already created.

14. When you have added all the users, click **Autoprovision Roles**.

15. Click **Save and Close**.

You can view everyone you created in the **Resource Directory** by using the Navigator.

View Employees in the Resource Directory

To view the employees that you created in the Resource Directory:

1. In the Navigator, click **Resource Directory**.

2. Click the Tasks panel tab.

3. In the Resource Organizations region, click **View Organizations**.

4. On the View Organizations page, in the **Organization** field, type the name of the organization for which you want to view the employees.

5. From the displayed list of organizations matching your search, click the organization that you want.

   The list of employees is displayed in the Members tab.

For more information about the Resource Directory, see the *Oracle Fusion Automation Using Customer Data Management for Sales and Service* guide.

Related Topics

- Overview of Setting Up Users and Security

- About Security Roles

- How do I enable desktop pages for Resource Directory?

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How do I set the scope in Service BU setup?

When you opt in to the business units (BUs) feature for Service, the Scope column in the Business Units tasks list contains links to set the scope of the task.

Let's learn how to set the scope for tasks when setting up BUs for Service.

To set the scope for tasks when you set up BUs for Service:

1. Sign in to the application as an administrator or a setup user.
2. Navigate to **Setup and Maintenance**.
3. From the **Setup** drop-down list, select the Service offering.
4. Select the **Business Units** functional area.
5. From the **Show** drop-down list, select **All Tasks**.
6. In the **Scope** column for any task in the task list, click the displayed link.

   The **Select Scope** dialog box is displayed, and the task for which you are setting the scope is already selected.

   > **Note:** When you go to the task list for the first time, the scope may not be set and the **Scope** column displays the **Select** link. After you set the scope once, that BU appears as a link in the Scope column.

7. From the **Business Unit** drop-down list in the **Select Scope** dialog box, select **Select and Add**.
8. Click **Apply and Go to Task**.
9. On the Select and Add: Business Unit page, search for and select the BU that you want to set for the scope.
10. Click **Save and Close**.

    The page opens for the task you're working with. On this page, you can choose to use the default **Site Level Value** or select the **Business Unit Profile Value**.
11. To select a Business Unit Profile Value:

    a. Deselect the **Use Site Value** check box.
    b. In the **Business Unit Profile Value** field, enter the profile value for the BU.
    c. Click **Done**.

The task closes and now on the Setup page, the BU that you set for the Scope is populated for all tasks. Each task you open now is the setup for the BU in the **Scope** column.

To set up additional BUs, repeat the same steps.

> **Note:**
> - After you set up the first BU, the **Business Unit** drop-down list in the **Select Scope** window shows the BUs that you already set up.
> - For all tasks, the scope displays the BU that you're currently working with. To change the BU again, click the BU in the **Scope** column for any of the tasks.

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Overview of optional setup tasks for Service BU

Once the preliminary steps for setting up Service business units (BUs) are done, you can set up BU-specific tasks. All the BU-specific tasks are grouped in the Business Units functional area.

For multiple BUs in Service, the setup tasks are the same as in a normal Service setup. The only difference is that with most tasks for multiple BUs, you can do one of the following:

- Use the default site-value profile option.
- Set or select the business unit profile value.

However, the previous statement isn't true for some tasks for multiple BUs. The following multiple-BU tasks aren't related to profile options, so you must configure these tasks for each BU separately:

- Manage Service Categories for Business Units
- Manage HR Help Desk Service Categories for Business Units
- Manage Communication Channels for Business Units

Note: Categories and channels are restricted based on the BU set as the scope.
- When a new category or channel is created, it's automatically associated with the BU set in the scope. For more information about setting the scope for tasks when setting up BUs, see "Set the Scope in Service BU Setup".

- You can set the BU only for the top-level category. The BU on the child categories is automatically set based on the BU of the root category.

Here's a list of the other Service optional setup tasks and the help topics that provide more information.

Service Task	Related Topics
Manage Business Unit	Define Business Units
Manage Service Product Groups Usage for Business Unit Manage HR Help Desk Product Group Usage for Business Unit	Define a Catalog for the Service Offering Associate Different Catalogs to Different Business Units
Manage Service Categories for Business Unit Manage HR Help Desk Service Categories for Business Unit	Manage Service Request Categories Manage Service Request Categories and Product Usage Groups for HR Help Desk
Manage Communication Channels for Business Unit	Managing Communication Channels
Manage Service Email Templates for Business Unit	Define Email Templates Configure HR Help Desk Email

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Service Task	Related Topics
Manage Human Resources Help Desk Email Templates for Business Unit	**Note:** You must perform extra steps to complete the Manage Service Email Templates for Business Unit task. In Functional Setup Manager, in the Business Units functional area of the Service offering, show **All Tasks**. For each task, click the **Scope** link and select the BU that you want. When you finish, click the **Select and Go to Task** button.
Manage Service Milestone Configuration for Business Unit	Overview of Milestones for Multiple BUs
Manage Outbound Email Profile Values for Business Unit	Configure Profile Options for Inbound and Outbound Email

Related Topics

- How do I manage categories?
- How do I set the scope in Service BU setup?
- How do I define a catalog for Service?
- How do I define email templates?

Secure the Business Unit Field on a Service Request

Let's say you want to restrict users with certain job roles from changing the business unit (BU) while editing a service request (SR). You can secure the BU field on the SR object by using the Update Service Request Business Unit privilege.

If you remove this privilege from the listed job roles, users with these roles can't change the BU of the SR.

The following predefined job roles can change the BU when they edit an SR:

- Customer Service Representative
- Customer Service Manager
- Sales Manager
- Sales Representative
- Sales VP
- Customer Relationship Management Application Administrator
- Sales Administrator
- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager

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Remove the Update Service Request Business Unit Privilege

If you remove the Update Service Request Business Unit privilege from the job roles mentioned in the previous list, users with those roles can't change the BU of the SR when editing.

> **Note:** You can remove the Update Service Request Business Unit privilege from a user's job role only if you had granted one of the predefined service job roles from the previous list to each of your users.

To remove the Update Service Request Business Unit privilege from a user's job role, perform the following steps in Security Console:

1. From the previous list of job roles, copy the predefined job role that's granted to the user. This predefined job role should have one of the following duty roles:
   - Service Request Administrator
   - Service Request Power User
   - Service Request Troubleshooter
   - Service Request Contributor
   - Service Request Channel User
2. Copy the duty role that's already granted to the copied job role.
3. Edit the copied duty role and remove the Update Service Request Business Unit privilege from the role.
4. Edit the previously copied job role. Remove the service duty role that you copied to create a custom duty role.
5. Add the custom duty role to the copied job role.
6. Remove the previously granted predefined service job role from the user.
7. Grant the new custom job role to the user.

If you have custom roles for your users, complete the following steps to remove the Update Service Request Business Unit privilege from the user's job role:

1. Identify the custom role that has the Update Service Request Business Unit privilege.
2. Remove the Update Service Request Business Unit privilege from the role.

Related Topics
- Guidelines for Copying Roles

Export and Import the Functional Setup Data for Business Units

You may have created the functional setup data for all business units (BUs) in the Service offering in your test environment. After testing it, you may want to export the data to your production environment.

You can export or import the functional setup data by using the export and import feature in Functional Setup Manager. You can complete this process by using either an implementation project or the implementation method based on offering.

When you use the method based on offering, all the functional setup data for the Service offering is exported or imported, including the setup data for all the BUs. You can also export and import the functional setup data for a

specific BU by using an implementation project. This way, you have additional management flexibility in scenarios where each BU manages its own set of configurations.

For more information about the following features in Functional Setup Manager, see the Oracle Fusion Using Functional Setup Manager guide.

- Using implementation projects
- Export and import feature
- Implementation method based on offering

To export the functional setup data for BUs in the Service offering by using an implementation project:

1. Sign in as a setup user.
2. Navigate to the **Setup and Maintenance** work area and open the Tasks panel tab.
3. Select **Manage Implementation Projects**.
4. On the Manage Implementation Projects page, create a new implementation project to export the functional setup data for one of the following:
   - A specific business unit
   - All business units
5. Save and open the implementation project.
6. In the **Task Lists and Tasks** area, ensure that you add the **Define Business Units for Service** task list to the project.
7. Determine whether you want to export the setup data for a specific BU or all BUs.
   - If you want to export the setup data for all BUs, then go to step 12.
   - If you want to export the setup data for a specific BU, then complete all the remaining steps.
8. Expand the task list.
9. Navigate to the first task that has a **Select** link in the **Selected Scope** column. Click the **Select** link.
10. From the **Business Unit** list, select **Select and Add**.
11. Click **Apply and Go to Task**.
12. In the **Select and Add Business Unit** window, search and add the specific BU.

    The selected BU appears in the **Selected Scope** column for all the tasks in the task list.
13. Click **Done** for the implementation project.
14. Continue to create the configuration package as described in the "Exporting Setup Data Using Implementation Project" process in the Oracle Fusion Using Functional Setup Manager guide.

When you export the configuration package:

- If you select all BUs in step 3, the export data includes the functional setup data for all BUs in the Service offering.
- If you select a specific BU in step 3, the export data includes the functional setup data only for the selected BU.

Note: To import the functional setup data for BUs, follow the steps described in the *Using Functional Setup Manager* guide.

Related Topics
- Setup Data Export and Import Using Implementation Project
- Export Setup Data Using Implementation Project
- Setup Data Export and Import Using an Offering or a Functional Area

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Overview of BU-Based Service Request Visibility

When users view lists of service requests (SRs) or create user-defined searches, they can typically see all SRs. But you can restrict their access based on their business unit (BU) membership, if required. The predefined roles don't have SR visibility based on BU.

In the Security Console, you can assign BU-based visibility for SRs to specific roles. Consequently, users with these specific roles can see only the SRs assigned to the BUs where they're a resource member.

With this data security policy, your company can ensure that all predefined and user-defined searches are restricted only to BU membership for a set of users.

For more information about assigning the data security policies based on BU to your users, see Set Up Service Request Visibility Based on BU.

Related Topics
  • How You Set Up Visibility Based on BU

Migrate Business Objects Between Different Business Units

Sometimes, you may want to migrate some business objects between business units (BUs). But not all objects can be migrated.

You can migrate only the following business objects from one BU to another:

  • Category
  • Channel
  • Milestone Configuration
  • Service Request

Note: You can migrate only one business object at a time.

To migrate the listed business objects from one BU to another:

  1. In the Navigator, click **Scheduled Processes**.
  2. On the Overview page, click **Schedule New Process**.
  3. In the **Schedule New Process** dialog box, select **Job** as the **Type** option.
  4. Click the **Name** drop-down list and click **Search** at the end of the displayed list.
  5. In the **Search and Select: Name** dialog box, type `Migrate` and click **Search**.
  6. From the displayed list of jobs, select **Migrate Service Business Unit Data** and click **OK**.

     The **Schedule New Process** dialog box displays the name of the selected job.
  7. Click **OK**.

8. In the **Business Object** field in the **Process Details** dialog box, select the business object that you want to migrate.
9. From the **From Business Unit** drop-down list, select the BU from which you want to migrate the business object.

> **Note:** If some existing records aren't associated with any BU, you can leave the **From Business Unit** field blank.

10. From the **To Business Unit** drop-down list, select the BU to which you're migrating the business object.
11. Click **Submit**.

Associate Different Catalogs with Different Business Units

When you have multiple BUs, you must create multiple usages, one for each BU. You can then associate a different catalog with each usage. This way, each BU is associated with a separate catalog.

If you have two BUs and you want to associate two different catalogs with the two BUs:

1. Create two different catalogs.

   For more information about creating catalogs, see "Sales Catalog High-Level Setup Steps".
2. Create two usages for the two BUs.
   a. In the Setup and Maintenance work area, go to the following:
      - Offering: Service
      - Functional Area: Service Catalog
      - Task: Manage Product Group Usage
   b. In the Manage Product Group Usage page, go to the Product Group Usage region.
   c. Click the **Actions** drop-down list.
   d. Click **Create**.
   e. In the **Create Product Group Usage** dialog box, in the **Usage** field, specify a name. For example, `BU_1_Usage.`
   f. In the **Usage Code** field, specify a code.
   g. Deselect the **Allow Duplicate Content** check box.
   h. Click **OK**.
   i. To create a second usage for the second BU, repeat steps c to h.
3. Associate a catalog with a usage.

   For more information about associating a catalog with a usage, see "Define a Catalog for the Service Offering".
4. Associate a BU with a usage.
   a. In the Setup and Maintenance work area, go to the following:
      - Offering: Service
      - Functional Area: Business Units
      - Task: Manage Service Product Group Usage for Business Unit
   b. For the first BU, deselect the **Use Site Value** check box.

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     c. In the **Business Unit Profile Value** column, specify the usage code of the first usage that you created.

> **Note:** You must specify the usage code, and not the usage name.

5. Click **Done**.
6. Repeat steps 3 to 5 for the second usage and the second BU.

Related Topics
- Sales Catalog High-Level Setup Steps
- How do I define a catalog for Service?

9 Understand Case Management Analytics

How do I view analyses using OTBI?

Oracle Transactional Business Intelligence (OTBI) is a real time, self-service reporting solution bundled with your application.

OTBI provides prepackaged analytic content built on the Oracle Business Intelligence (BI) platform. These include subject areas for building your own dynamic analyses using an intuitive interface, industry standard metrics, and role-based, best practice reports and dashboards that deliver up-to-the-minute business insight across the entire extent of your service-related business operations.

Here's how you can view the analyses:

- To access BI Catalog, select **Navigator > Tools > Reports and Analytics**. The Reports and Analytics page is displayed.

  - Click the **Hierarchical Selector >>** icon and select **My Folders** or **Shared Folders** from the menu. Alternately, you can click the **Browse Catalog** button. The BI Catalog is displayed, where you can view your personal and shared analyses. You can also create your own analyses based on your business requirements using subject areas. You need to have the necessary privilege for authoring analyses.

- To access the Analytics page, from the Home page, click the Service group icon, and then click the Analytics icon. The Analytics page is displayed. You can search for the analyses available in BI Catalog, and mark your favorites. These favorites stay on the Analytics page as long as they remain favorites. This page also shows the analytics recently viewed by the signed in user.

- To access the Service Infolets page, from the page control on the Home page, click the Service Infolets icon. Prebuilt and administrator-defined or user-defined infolets are displayed on the Service Infolets page.

Case Management Analytics Roles

The Case analyses are visible for the case manage and case worker job roles. Analyses and the underlying data is secured through a set of delivered OTBI transaction analysis duty roles.

Users with following roles can also access the reports:

- Sales Administrator
- Customer Relationship Management Application Administrator

The administrator defines which users, application roles, and catalog groups have the following privileges:

- Receive the delivery content of an agent.
- Have permission to access a section or alert section in a dashboard.
- Have permission to use a saved modification.
- Have permission to add or edit an existing catalog group.

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- Assign permissions to a catalog object.

Infolet Name	Job Role
• Team Active Cases by Age • Active Case Detail • My Active Cases	• Sales Administrator • Case Manager • Case Worker

Related Topics

Analytics Subject Areas

Creating analyses begins with subject areas. A subject area is a functional grouping of the contextual entities (also called dimensions) by which the metrics (also called facts) can be analyzed.

Subject areas are the building blocks of analytic content in OTBI. For example, the columns in a tabular report showing the number of open cases (metric or fact) by Agent Name (context or dimension) are sourced from one of the subject areas. Multiple subject areas can be joined to produce reports, when cross-functional analysis is needed.

The service application comes with a variety of standard subject areas for you to select from when you're building or editing your analytics.

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Overview of Parent and Child Interactions in Analytics

With the support for cross-channel interactions, there is the prospect of an initiated interaction crossing channels and agents. Additionally, the ability to associate multiple business objects is also introduced as part of this functionality.

When a communication is initiated with a customer, an interaction is created that contains the channel, contact, resource, and multiple other attributes. Each interaction can have only one reference to each of these attributes. In the case of business objects, an interaction can be associated with one of each type of business object. In the case where a communication adds additional attributes, the application automatically generates a child interaction, and associates it to the original parent.

Here's a few examples of such cases:

- A communication crosses channels (the child interaction would store the new channel).

- A communication is transferred between agents (the child interaction would store the second agent).

- More than one type of business object is associated. For example, an interaction can be associated with one service request. However, if during the conversation, a second service request is created or updated, the second interaction would have to be stored in a child interaction.

For metric calculations in BI, it's often necessary to count the entire set of these atomic interactions, as a single interaction. This single interaction is referred to as the parent interaction. The atomic interactions are referred to as child

interactions. The parent interaction count isn't the summation of child interaction count. In any cross-channel or cross-agent interaction, there's always a single parent interaction, and more than one child interactions.

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10 Import and Export

What's Import and Export Management?

Import and Export Management is used to import and export a wide range of application data using import and export management in your service application.

For example, you can use Import and Export management to export object data so that you can import it into another instance. You can also import records to the applications so that you don't have to create the records in the user interface. Only users with the service request administrator duty role or Help Desk administrator role can import and export objects.

Overview of Import Objects

You can import several objects into the application using the import management framework.

To import objects, Click **Tools > Import Management > Import Objects**.

The following is a sample list of top-level and sublevel objects that you can import into the service application. For more information on these and other objects available for import, see the Oracle Fusion Understanding Import and Export Management for Sales and Service guide.

- Case

    o Case Contact

    o Case Household

    o Case Message

    o Case Opportunity

    o Case Resource

- Queues

    o Queue Party Resources

    o Queue Team Resources

- Categories

    o Service categories

    > **Note:**
    >   o Since the service request data depends on queues and categories, you must import the queues
    >   and categories before importing your service requests.

- Interactions: You can't import interactions into the application, but you can export the interactions for the service requests.

- Inbound email

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- Inbound Message Filters: You can import the inbound message filters through Setup and Maintenance.

- Milestone Configuration: You can import and export milestone configurations only through Setup and Maintenance.

- Channels

    ○ Channel Resources

- Standard Text Folders: The import facility doesn't support importing hierarchical data directly. To import folders hierarchies, such as parent and child relationships, you must import the standard text folders data twice. The first time you import the file, the object data is added, and the second time you import the same file, the relationships are created.

- Standard Text Variables

- Standard Text

    ○ Standard Text Relations

- Self-Service Roles

Overview of Export Objects

You can extract large volumes of data from the application using bulk export. You can either extract a full set of records for an object, or perform incremental extracts. For example, you can extract the complete set of service requests data or extract an updated set of records every week.

To export objects, Click **Tools > Export Management > Export Objects**. For more information, see the Oracle Fusion Understanding Import and Export Management for Sales and Service guide.

Use Functional Setup Manager to Import, Export, and Compare Categories Between Environments

Your users can import, export, and compare service categories between environments using Functional Setup Manager. Users to create or update setup service category data in bulk as well as compare differences between two environments.

For example, a user wants to import service category data into a production environment that has been exported from a test environment after making changes to the setup data. Before the user imports the data, the user can compare the exported data of the test environment with the existing production data, and preview how the setup data in production will change after the data is imported.

Any implementation usually requires migrating setup data from one environment to another at various points in the subscription lifecycle. For example, a subscribed offering is typically set up in the test environment first, and is moved to the production environment only after proper testing and verification. Setup export and import processes help you migrate setup data from test to production.

Note: You must have the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to export, import, and compare setup data.

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For more information, refer to the Related Topics section for a link to the Oracle Fusion Using Functional Setup Manager guide.

Related Topics
-

Before You Import

Since the service request data is dependent upon queues and categories, you must import the queues and categories before importing your service requests. Before you import service requests, queues, or categories, you must first import the following dependent objects:

- *Accounts*: The list of accounts that can be associated with the SR. Selecting an account is required when creating an SR. For more information about importing accounts, see "Import Your Account Data" in the guide specified in Related Topics.

- *Contacts*: The list of contacts for each account that can be associated with the SR. For information about importing contacts, see "Import Your Contact Data" in the guide specified in Related Topics.

- *Resources*: The list of resources to which you can assign work objects in the SR. For information about importing resources, see "Import Resource Data" in the guide specified in Related Topics.

- *Partners*: The list of partner accounts that you can associate with an SR. For information about importing partners, see "Import Your Partner Data" in the guide specified in Related Topics.

- *Product Groups*: A product group is a group of related products. For information about importing product groups, see "Import Your Product Group Data" in the guide specified in Related Topics.

- *Products*: List of products against which you can raise an SR. For information about importing products, see "Import Your Product Data" in the guide specified in in Related Topics.

- *Asset*: List of assets associated with the account. For information about importing assets, see "Import Your Asset Data" in the guide specified in Related Topics.

- *Categories*: The categories associated with the SRs. For information about importing categories, see "Import Your Service Request Data" in the guide specified in Related Topics.

- *Queues*: The queues to which your SRs are assigned. For information about importing queues, see "Import Your Queue Data" in the guide specified in Related Topics.

- *Channels*: Import the channels that are already associated with your SRs. For information about importing channels, see "Import Your Service Request Data" in the guide specified in Related Topics.

- *Tags*: The administrator-defined tags to be associated with SRs. For information about importing tags, see "Import Your Service Request Data" in the guide specified in Related Topics.

Related Topics
-

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Import Objects

After you import the dependent objects, create an import activity to upload details of objects you want to upload. Here's how you import an object:

1. Set up the import options.

   You select the object you're importing, specify the file format and different import options, and upload the file with your data. The options that are available depend on the object that you're importing. Some import objects, for example, permit you to upload a ZIP or Java archive (JAR) file of attachments. These attachments are then attached to the records in the application after the import is complete.

2. Map the fields.

   For this task, you create a mapping of the data in your file and the attributes in the application. You can also reuse a mapping that you have created in past import activities. Any mapping you create in an activity is automatically saved. This mapping can be reused in subsequent imports and can be managed using the Manage Mapping page.

3. Schedule the import.

   You can schedule to run the import at a time you specify or run it immediately.

4. Review and activate the import activity.

   Review your import details and click **Activate** to activate the import activity.

You can use predefined .csv templates for your service requests, queues, and categories that are provided in the application. You can also import user-defined objects.

Overview of Bulk Data Export

You can extract large volumes of data using bulk export. You can either extract a full set of records for an object, or perform incremental extracts.

For example, you can extract complete set of account data or extract updated set of records every week. Bulk export creates comma separated or tab delimited files, which are attached to the export process.
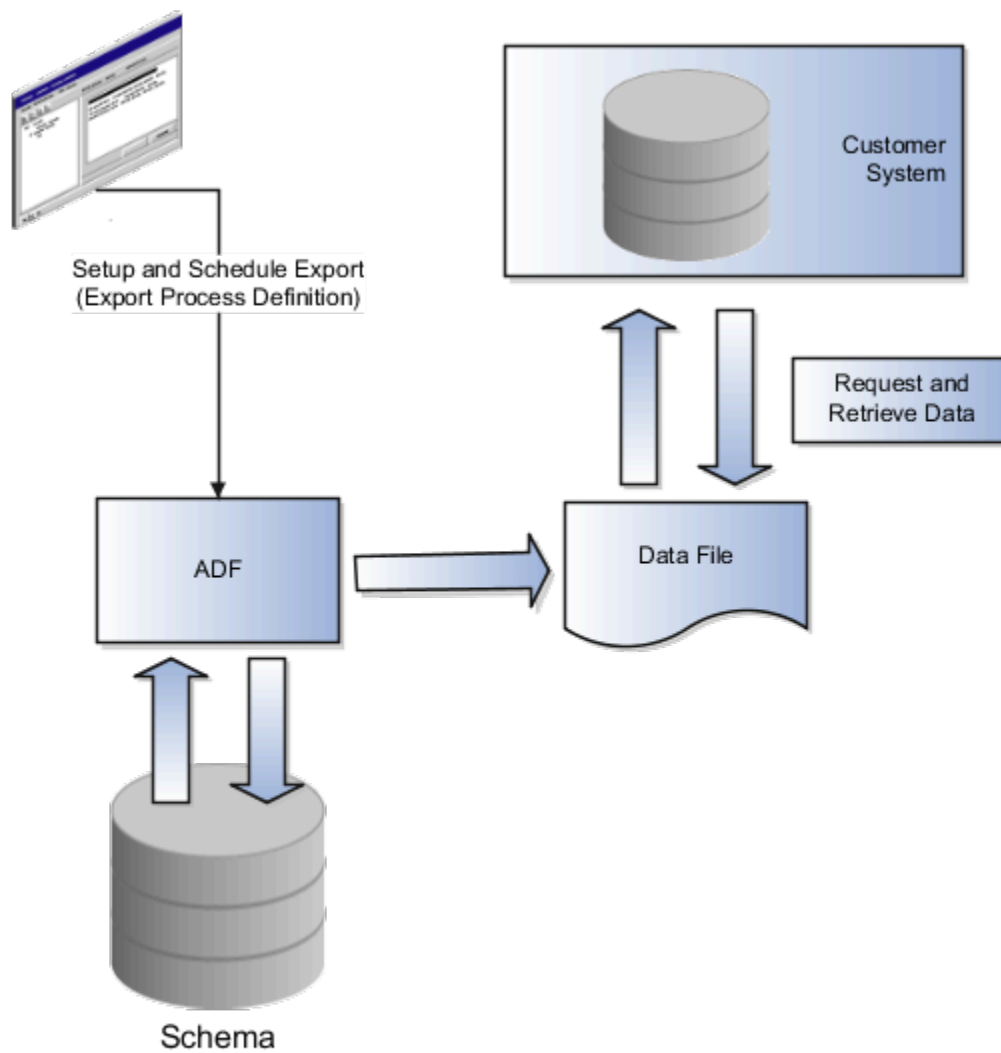
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11 Extend Case Management

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 a 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.

Set Up Visual Builder Studio

Before your team can start creating application extensions, you must first set up Visual Builder Studio and configure it.

> **Note:** It's strongly recommended that you've only one deployed extension. Having multiple extensions can lead to changes being lost or not implemented. Having all changes in one extension streamlines future updates and enables you to have a complete picture of work that has been done.

Get Started

Start with *Essential Set-up Tasks* in the Administering Visual Builder Studio guide.

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Set Up VB Studio

Next, read the following instructions in *Set Up VB Studio to Extend Oracle Cloud Applications*in the Administering Visual Builder Studio guide.

This chapter tells you how to set up VB Studio so your users can work with Oracle Cloud Applications in and extension.

Work with Dynamic UI

Get to Know Layouts

After you launch VB Studio, VB Studio Designer displays the form you were examining in Case.

You can extend components within the Create Case page, the Edit Case page, and other pages within the application. For this example we'll work with the **Create Case** page.

The following image shows the various components of the VB Studio UI:
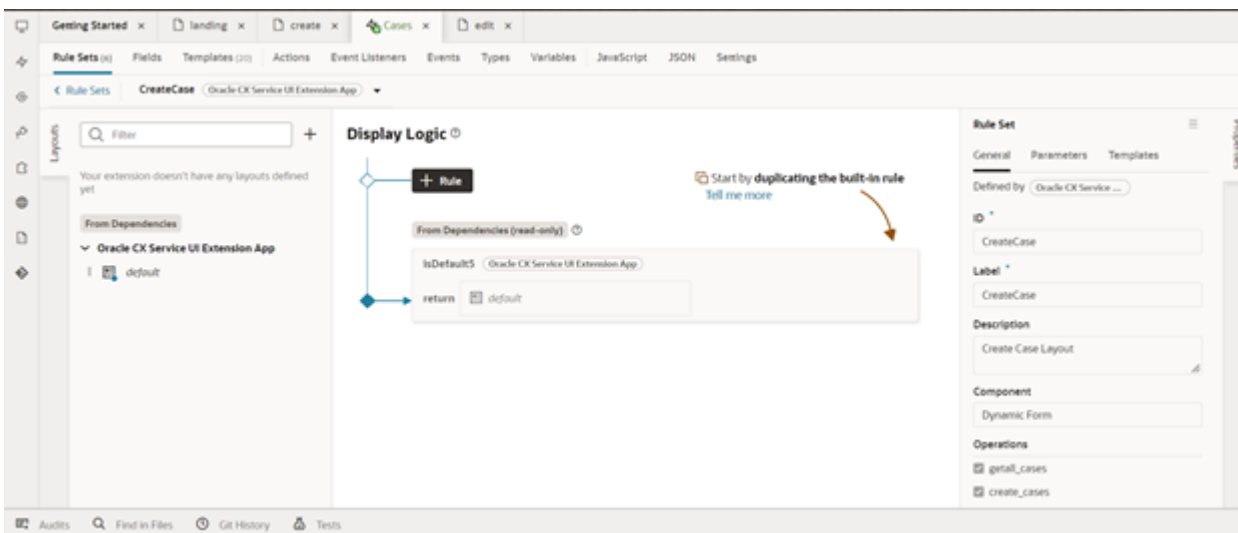
The UI consists of the explorer where you view your project artifacts, the canvas where you view your display logic, such as forms and containers, and the Properties pane where you view and change properties.

Directly Editing the Dynamic UI

Here's an overview of how you edit directly in the dynamic UI.

1. When you're on a Redwood page, such as Create Case, click the Settings and Actions menu and select **Edit Page in Visual Builder**.
2. In VB Studio, expand **App UIs > Oracle Fusion Service UI Extension App > Service > ec > case**.

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3. All the sub-components are displayed under the case component.

> **Note:** This is where you'd go to extend the child objects under case related dynamic forms or dynamic tables, such as Case Team Members, Case Contacts, and so on..

Related Topics
- What are Dynamic Components?
- Understand the Designer

What dynamic forms can I extend?

The Case Management UI is highly extensible. This topic gives you an overview of what layouts in the Case Management UI then you can extend using Visual Builder Studio.

The following two tables list many of the dynamic forms that you can configure, and many of the dynamic tables, used for , that you can extend.

Let's first look at the Create Case layout:

Now lets look at the different extensible layouts from the Cases page.

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- View Case Contact Expanded Layout which is where you can designate the contact as primary.
- View Case Contact Expanded Layout which is where you can designate the contact as primary.

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- Team Members Collapsed Layout. Click the team member name to view the additional layout.

Team Members			
Assigned To ⇕	**Resource Name** ⇕	**Email** ⇕	**Phone** ⇕
★	Matt Hooper	sendmail-test-discard@oracle.com	

- Case Details (Edit Mode)

∨ Details

Cancel / Save

Title
Need SNAP benefit
Enter 400 or fewer characters.

Case Number
CDRM_46102

Status
New

Priority
Low

Primary Contact
Daniel Mi Xio

Primary Household
Josh Family

Assigned To
Matt Hooper

Case Type
Assistance

Queue

Category

Description
Looking for SNAP benefit

- Case Details Summary (View Mode)
- Case Details

∨ Details

Edit

Title
Need SNAP benefit

Case Number
CDRM_46102

Status
New

Priority
Low

Primary Contact
Daniel Mi Xio

Primary Household
Josh Family

Assigned To
Matt Hooper

Case Type
Assistance

Queue

Category

Description
Looking for SNAP benefit

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- Case History (Read Only)

Work with Dynamic Forms

How do I duplicate a form in Visual Builder?

This example, using the Create Case 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 Click the **App UIs** tab, then **Oracle Fusion Service UI Extension App > service > ec > case > create**.
2. In the Properties pane, click the **Components** tab, and select **cases - createCase**, 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.
5. In the Built-in layouts area, hover in the default layout, and select the **Duplicate** button.
6. 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.

1. After you duplicate the form, select it in the Designer.
2. Click the **Fields** tab to view available fields for the form.

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 Case priority level is reached. First duplicate the layout, or choose your layout, then do the following:

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1. Click the **Click to add condition** link.
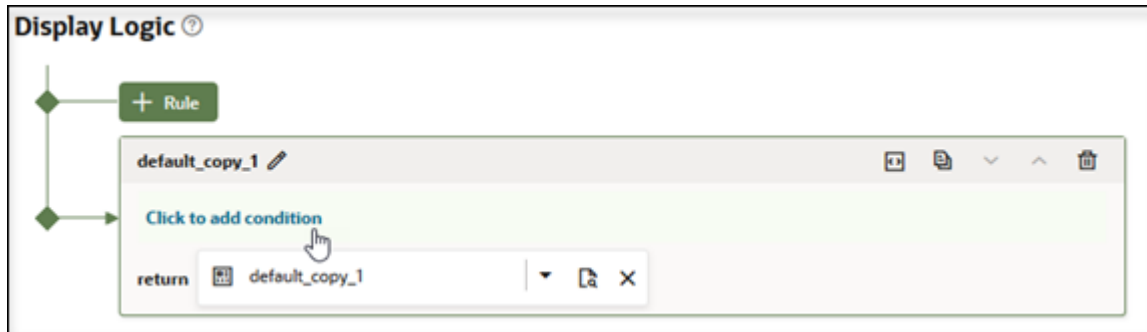
2. From the **Attribute** drop-down list, select the priority code value: `$fields.PriorityCd.value()`, then in the Value field, enter: ORA_SVC_HIGH as shown in the following example:
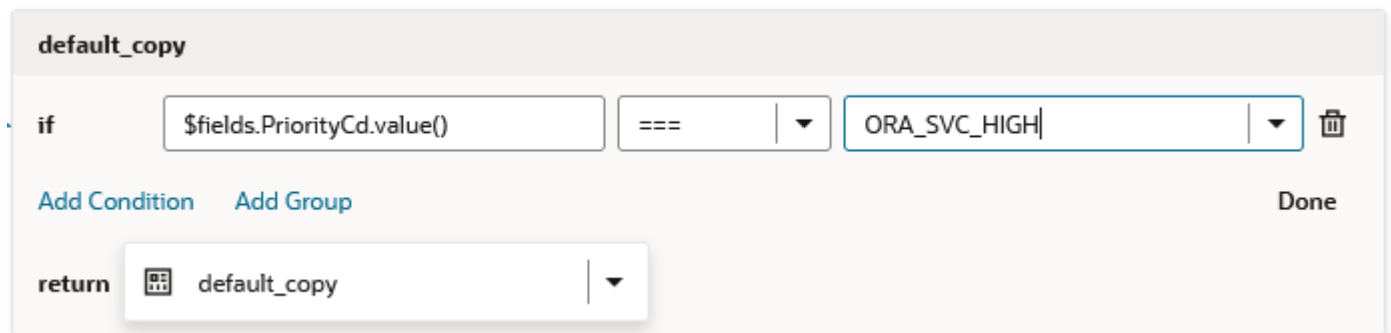
Now the layout will only display when a case has a priority value of High.

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 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 Case.

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

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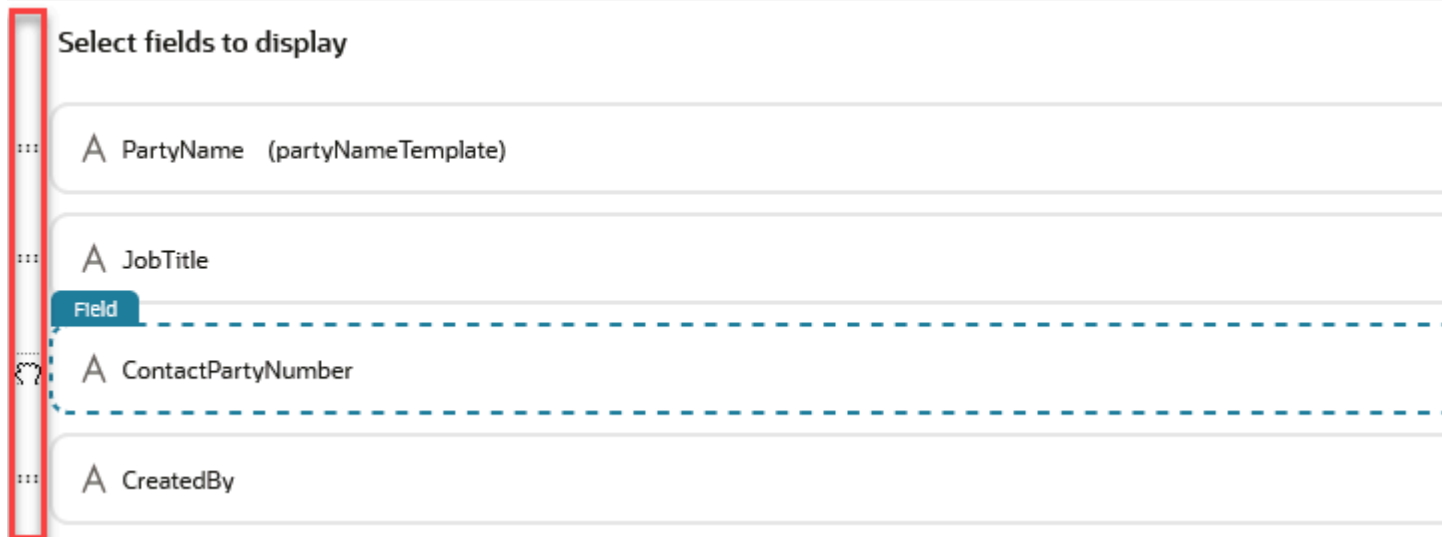
6. To hide a field either deselect the field in the field list, or hover in the field in the layout and click the **X**.

How do I 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 Case Contact 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 My Cases 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 **Cases** 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 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.
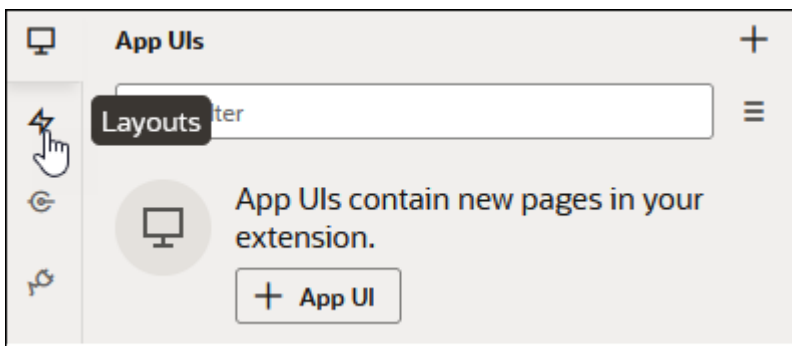
2. Find the object you want to add the field to.

3. In this example, we'll use the **Case create** object, so click that object.

4. Display the rule sets, and then choose the one you want to add the field to.

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5. For this example, choose **Case Summary (Edit Mode)**.

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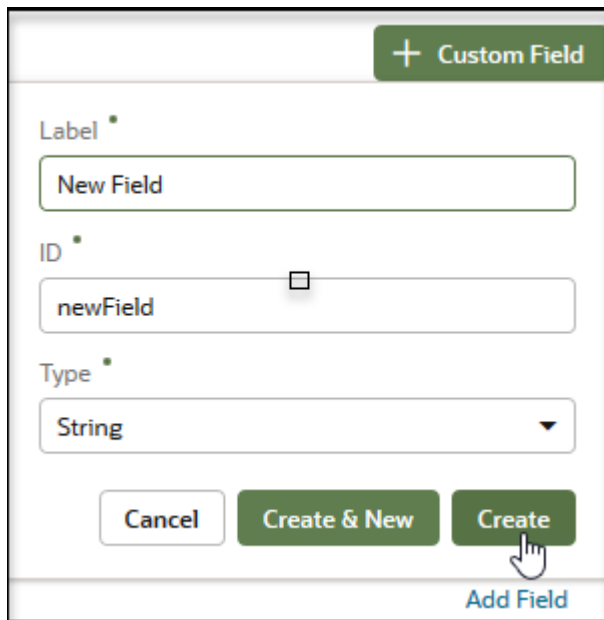
How do I add a read only custom field using VB Studio?

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?*.
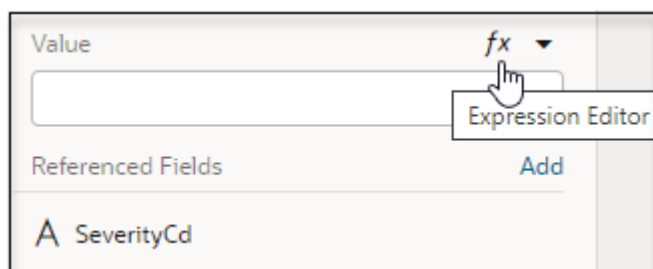
1. In the Applications Extensions explorer, navigate to **App UIs > Oracle Fusion Service UI Extension App > Service > ec > case > create** .
2. Click the **Fields** tab.

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 **PriorityCd** field from the results that appear and then click **Add Field**.

8. Now, click the Expression editor:

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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.
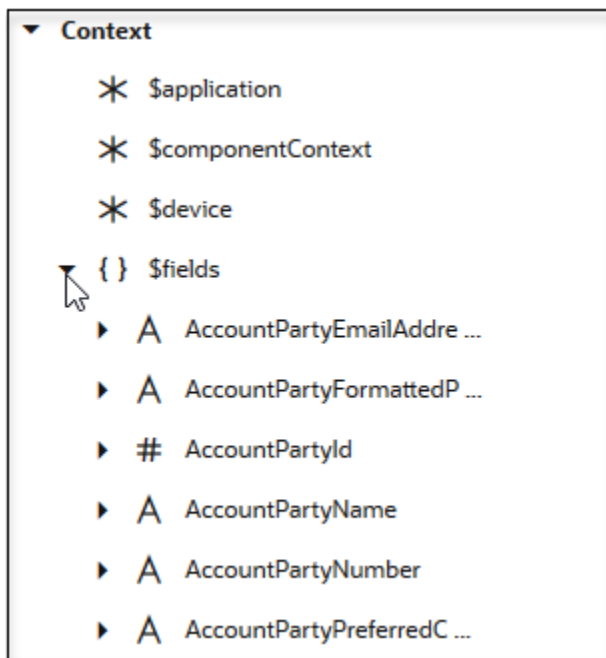
    b. Find the **PriorityCd** field in the list, expand it, and drag **value** into the editor.

    c. Add the following to the expression: `$fields.PriorityCd.value(), then in the Value field, enter:`
       `ORA_SVC_HIGH`

    d. Click **Save**.

    Now the custom field will only display if and value has a priority 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 checkbox 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 Case layout.

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

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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** checkbox.
4. To make the field required, just click the **Required** checkbox.
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 PriorityCd variable and drag **value** on to the editor workspace as shown in the following example:
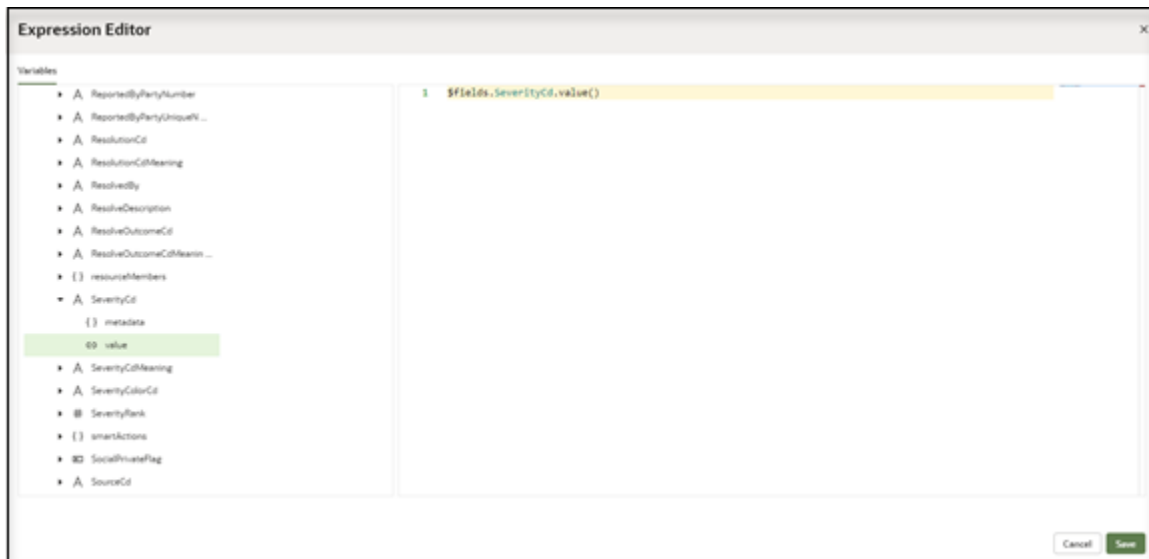
   f. Add the following value to the expression: `=== 'ORA_SVC_HIGH'` .
   g. Click **Save**.

      Now the field only displays when priority level High is reached

Field Groups

Field groups are a way for an application developer to group multiple fields. A field group can have properties such as column span, maximum columns, label, and so on. These properties apply to the whole group.

Field groups can also be conditionally hidden. These conditions apply to all the fields in the group.

To create a field group, just do the following:

1. Select a **Dynamic form** layout.
2. Click the **Open** icon for the layout.
3. Click the **New Group** icon as shown in the following graphic.

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The field group is added to the layout.

4. Enter a name for the new field group, then click the check mark.

5. In the Properties window, enter values for the label of the group along with other properties such as maximum columns and `colspan` which determines the width of columns in your layout.

6. Add any fields you want into the group by dragging and dropping them from the explorer:
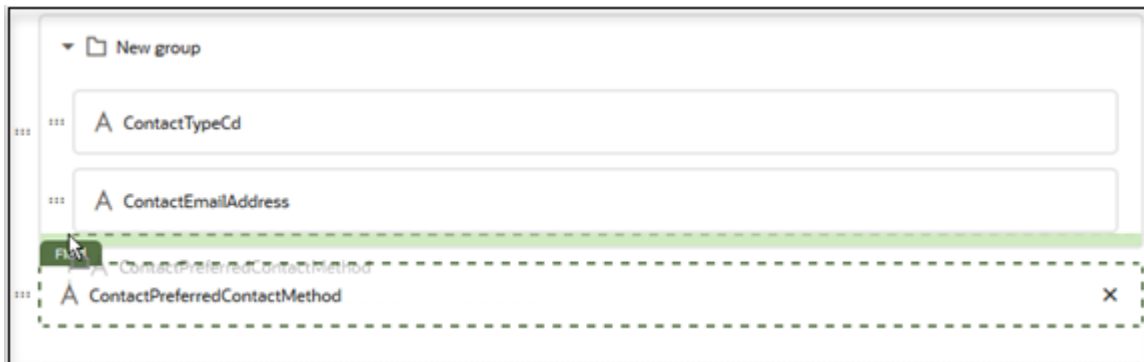
Create Your Own Field Template

You use field templates to configure how certain fields are rendered at runtime in a dynamic form or table.

You can use a combination of HTML and VB components to control how you want to display a field. A simple example for this would be: You want to display a warning text on the top of the Case if the Case is incomplete or inactive.

Here's how you do it:

1. Duplicate the **Case Spotlight (View Mode)** dynamic form (if you haven't done that already.)

   > **Note:** This form is the read only Case summary form that you see in the spotlight region.

2. Since we want to display the warning text at the top of the form, let's add and move the `statusTypeCd` field to the top of the layout.

3. In the field properties pane, click the **Create** link next to template. It will create a new field template.

4. Enter a name for the template in the **Label** field. The **ID** field will auto-populate.

   VBStudio designer opens. This is where you can design the template.

   > **Note:** There are tabs called Live, Design and Code. For this exercise we'll click on Code tab. If you go to the Design tab, you can use the editor to drag and drop VB components to define your template.

5. Click **Code**, and note that VBStudio has created a default template for you. We are going to remove the code that's inside your template tag, and paste the following code inside the template tag:

```
<oj-bind-if test="[[ $value() === 'ORA_SVC_INACTIVE' ]]">
 <oj-label-value>
 <div slot="value">
 <span class="oj-text-color-warning">
 <oj-bind-text value="This case needs attention."></oj-bind-text>
 </span>
 </div>
 </oj-label-value>
</oj-bind-if>
```

6. Note that we've used the `<oj-bind-if>` VB element, `<oj-label-value>` VB element, the `<div>` HTML element, and the `<span>` HTML element.

7. Now, click the **Design** tab, and then click Return to layout.

8. Note the warning text is now associated with the newly created template..

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Work with Dynamic Tables

Extend Dynamic Tables

You might want to extend a dynamic table, such as the Case Contacts table table to add or remove new fields or other elements.

Let's say you want to removed the Email Address field and add the JobTitle field to the **Case Contacts** Dynamic table. Here's how you do it:

1. In the Application Extension explorer, click **Layouts**, then expand **Oracle Fusion Service UI Extension app > Cases > CaseContacts**.
2. Click the **Case Contacts Layout** dynamic table.

   The layout rule set editor appears.
3. Duplicate the default layout if you haven't already done so.
4. Open the copied layout.

   The layout editor appears displaying all the attributes currently displayed in the Case contacts table.
5. Delete the Email Address field by hovering over the field and clicking the **X** icon.
6. Use the explorer to locate the **Job Title** field in the list of available fields.
7. Select the field by clicking the check box.

   The field is added to the table. You can now move the field to where you want it to reside in the table.
8. Test your changes by clicking the **Preview** button.

Work with Dynamic Containers

What's a Dynamic Container?

A dynamic container displays content in individual sections or logical regions of the page.

Each section maps to a template, which defines the content displayed within that section. Within Case Management, the **Case Details** page has a dynamic container. The Case Details page has multiple sections and templates in it:

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The display logic for determining what's displayed in a dynamic container is defined using cases. A case is similar to the rule set layouts used in dynamic forms and tables, but instead of selecting which fields to display, you select which UI elements or components to display. When you define a case, you specify the conditions for the case, and the templates you want displayed in the container when that condition is met. The template defines the content you want to display. Each template in a case is rendered as a section in the container, so if a case defined three templates, you would see three sections in the container.

A dynamic container holds a collection of display templates. The display logic for determining what's displayed in a dynamic container is defined using cases. A case is similar to the rule sets used in dynamic forms and tables, but you select display templates containing UI elements instead of selecting fields. You configure what's displayed in a container by creating cases, and then specifying the conditions and templates for each case.

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Related Topics

- Configure a Dynamic Container

Configure a Dynamic Container

The Case Edit Details page has seven sections. Let's say we have a requirement for a specific role. We don't want to show the Attachments section (Attachments template) to anyone with the Sales Representative role. Here's how you do it:

1. In the explorer, navigate to: **App UIs > Oracle Fusion Service Extensions App > Service > case > edit.**.
2. In the properties pane, click the **Components** tab to view the dynamic container, form, and table used.
3. Click **Container rule for case details panel**.
4. Click the **Duplicate** icon.
5. Enter a name for the new rule.
6. Click the Expression editor icon and add the following condition:

   `$application.user.roles.includes('ORA_ZBS_SALES_REPRESENTATIVE_JOB').`
7. Delete the **documentsSectionTemplate**.
8. Test to make sure a sales representative won't see the documents folder in the **Case Details** page

   > **Note:** The other details in VB will remain the same.

   .

Work With Templates in a Container

Now we'll look at an overview of containers.

You can easily relocate or remove a template from a container. You can also add templates to the default set. You can also have more than one container for a given page layout and add conditions for the page layout by user role.

Move or Remove a Template in a Container

Let's first look at how you move or remove a template in a container.

For this example, we'll use the Service Request dynamic container.

1. In the VB Studio explorer, navigate to **App UIs > Oracle Fusion Service UI Extension App > Service > ec > case > edit**.

   The dynamic container is displayed.
2. In the Dynamic Container explorer, you can view the following:

   o Extension: View the different layouts contained in the container. Each case represents a layout.

   o Templates: View the different templates in the container view.
3. Choose a case from the list, and in the display templates area, hover over a template.
4. Move a template by clicking the up or down arrow.
5. Remove an item by clicking the **Remove Item** icon.
6. Preview the layout by clicking the **Layout Preview** icon:
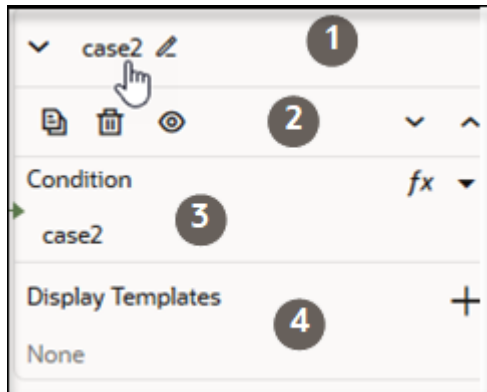
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7. Add, relocate or remove templates as you see fit.

Add a Container

Now we'll add a new case, or container then add templates to it.

1. In the Dynamic Container explorer, click the **+ Case** button.
2. A new case appears in the properties page similar to the following:

The case properties are as follows:

Callout Number	What You Can Do
1	Click the **Edit** icon to create your own title.
2	Hover over each icon to view the task you can perform. ○ Duplicate the container. ○ Delete the container. ○ Preview the layout. You can also click the up or down arrows to move the position of the container in the layout.
3	Click the Expression Editor icon to write an expression for the container, or click the Select Variable drop down list and choose from a list of out of the box variables.
4	Click the Add Template icon (+) to select from a list of provided templates.

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Service Request Categories

Manage Parent and Child Service Request Categories

Use the Service Request Categories setup page to move child categories between different parents, and promote child categories to a parent level. Also, you can use different attributes to search the categories.

Here's how you create service request categories:

1. Navigate to **Home > Service > Service Request Categories** (quick action).

   The Categories page is displayed. This page is extensible, so you can also add custom fields.
2. Create a top-level category:

   a. Click **Create**.

      The **Create Category** dialog box is displayed, with the **Create Top-Level Category** option selected.
   b. Enter a name in the **Category Name** field.
   c. Modify the **Category Code**, if needed.
   d. From the **Business Unit** drop-down list, select the business unit (BU) to which you want to associate the category.

      The **Business Unit** field is displayed only if the HZ_ENABLE_MULTIPLE_BU_CRM profile option is enabled. By default, the BU that's set in the scope is displayed. However, you can change the BU.
   e. Specify if the category must be active, by using the **Active** switch.

      The **Active** switch is enabled by default.
   f. Click **Create**.
   g. Create additional top-level categories, as needed.
3. Create child categories:

   a. From the categories list, select the top-level category for which you want to create child categories.
   b. Click **Create**.

      The **Create Category** dialog box is displayed.
   c. Select the **Create Child Category** option.
   d. Enter a name in the **Category Name** field.
   e. Modify the **Category Short Name**, if needed.
   f. Specify if the category must be active, by using the **Active** switch.
   g. Click **Create**.
   h. Create additional child categories, as needed.

      The child categories appear indented under the top-level category.

   Note: You can set the BU only for the top-level category. The BU on the child categories is automatically set based on the BU of the root category.

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Here's how you update existing service request categories:

1. From the categories list, select the child category you want to update, and then click **Update**.

   The **Update Category** dialog box is displayed.

   - To make a child category a parent category, use the **Promote to Top-Level Category** switch.
   - To move a child category to a different parent category, select a new category from the**Parent Category Name** drop-down list.
   - To modify the parent or child category name, update the name in the **Category Name** drop-down list.
   - To set the category as active or not, use the **Active** switch.

2. Click **Update**.

Here's some other tasks you can do:

- To see only the active categories on the page, use the **Show Active Only** switch.
- To search for a category, specify the search criteria under the **Search Categories** section, and then click **Search Categories**.
- To delete a category, select the category and click **Delete**.

Configure Intelligent Advisor Interviews

How do I create cases by interview?

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

To create cases 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 Case by Interview** button on the Case List page are:

1. Open the Case List page in Visual Builder Studio (**service > ec**) and find the **Constants** tab in the Right Hand Panel.
2. Click the **Constants** tab.
3. Set the values for these variables on the **Constants** tab.
   - showCreateCaseByInterviewButtonOnListPage: true
   - intelligentAdvisorHubURL: Enter the Intelligent Advisor Hub URL where your interview is deployed.
   - createCaseInterviewName: Enter your interview name.
4. Publish the changes.

The steps to enable and use the **Assess Case** link on the Case Details page are:

1. Open the Case Details page in Visual Builder Studio (**service > ec**) and find the **Constants** tab in the Right Hand Panel.

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2. Click the **Constants** tab.
3. Set the values for these variables on the **Constants** tab:
   - intelligentAdvisorHubURL: Enter the Intelligent Advisor Hub URL where your interview is deployed.
   - assessCaseInterviewName: Enter your interview name.
   - showAssessCaseLinkOnDetailsPage: true
4. Publish the changes.

Preview, Share, and Publish an Application Extension

Use the Preview and Share actions to view or have your team view your application extensions.

Publish your extensions using the Publish action. For information on all three actions, refer to the Related Topics links.

Related Topics
- How Do I Create and Publish an App Extension?
- Preview and Share Your Application Extension
- Publish the Application Extension

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