Oracle Service Cloud
Using Service Cloud Configuration Assistant
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Preface

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

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center.

Documentation Accessibility

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

Contacting Oracle

Access to Oracle Support

Customers can access electronic support through Oracle Support. For information, visit Oracle Service Cloud Support or visit Accessible Oracle Support if you are hearing impaired.

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- For guides: Oracle Service Cloud Documentation Feedback.
- For tutorials: Oracle Service Cloud Tutorial Feedback.
Overview of Service Cloud Configuration Assistant

The Oracle Service Cloud Configuration Assistant lets you manage your Oracle Service Cloud sites using Oracle Cloud. The Configuration Assistant lets you set up and manage the following.

- Interfaces: Available for Service Cloud
- Mailboxes: Available for Service Cloud
- Test sites: Available for Service and Oracle Policy Automation (OPA)
- Integrations: Ability to enable certain Service Cloud functional areas
- Smart Interaction Hub (SIH)
- Oracle Social Network (OSN)

Note: You can also manage certain aspects of your OPA site interfaces. While you cannot add interfaces to OPA sites, you can make changes to the URL and time zone values of an OPA interface.

The link to the Configuration Assistant is located on the Oracle Cloud My Services dashboard. You will receive the log in credentials for My Services dashboard in a welcome email from Oracle Cloud. The Configuration Assistant home page is displayed based on the products or services you have purchased, that is, Oracle Service Cloud.

Service Cloud Configuration Assistant Home Page

The Service Cloud Configuration Assistant home page displays information related to Oracle Policy Automation (OPA) and Test Sites, etc.

You can find the following information in the home page:

- Number of Services
- Interfaces
- Mailboxes

Information about Test sites:
  - Upgrade type
  - Site type
  - Production version
Create an Oracle Service Cloud Site

You can create a production site for Oracle Service Cloud from the Configuration Assistant home page.

Follow the steps below to create a site:

1. From the Configuration Assistant home page, click Create site.
2. In the Create Site window, select the required version option from the Product list.
3. In the Site Name box, enter a name for the your site.
   The URL is automatically generated based on the site name and the default domain. Though you can edit the site name in the URL, you cannot modify the default domain.
4. From the Language list, select your preferred language.
   ✍️ Note: You cannot change this option later. So, please choose the language pack carefully.
5. From the Time Zone list, select your preferred time zone for Oracle Service Site and then click Create.
   ✍️ Note: Refresh the Configuration Assistant home page after 60 minutes to verify that the site is created.
2 Oracle Cobrowse Cloud Service Configuration Assistant

About the Cobrowse Configuration Assistant

The Configuration Assistant Cobrowse page for Oracle Service Cloud displays the list of Cobrowse Cloud Service Instances purchased by your organization.

For each instance, the following information is displayed:

- Name
- Subscription ID
- Admin Password Reset URL

Create a Standalone Cobrowse Instance

The Standalone Cobrowse Instance does not get integrated with a Service Cloud site. Only the ‘Cobrowse’ channel is offered in the Standalone mode.

To create a Standalone Cobrowse Cloud Service Instance:

1. From the Configuration Assistant home page, click the Cobrowse/Video Chat tab.
2. Click the Create Instance button.
   The Create Oracle RightNow Cobrowse Cloud Service Instance popup appears on the screen.
3. Select the Cobrowse option and then click Create.
   A confirmation popup appears on the screen.
4. Click OK.
Create an Integrated Cobrowse Instance

You can create a Cobrowse Instance from the Oracle Service Cloud Configuration Assistant Cobrowse and Video Chat tab.

This instance can be a Standalone instance or an integrated instance with a Service Cloud site.

To create an Integrated Cobrowse Instance:

1. From the Configuration Assistant home page, click the **Cobrowse/Video Chat** tab.

   ✔️ **Note:** If there are any existing Cobrowse/Video Chat instances for the service, these instances will be displayed under this section.

2. Click the **Create Instance** button.

   The Create Oracle RightNow Cobrowse Cloud Service Instance popup appears on the screen. You can select either Cobrowse or Video Chat or both options.

   If you select the Video Chat option, the following options appear under the Video Chat option selection:
   - 2-Way — Select this option to use video chat for both the parties
   - 1-way from Agent — This option is selected by default.
   - 1-way from Visitor — If you select this option, only the visitor will be able to initiate the Video Chat.
   - audio-only — Select this option if you want to have the audio chat only.

3. From the Oracle Service Site drop down list, select the service site to be integrated with the Cobrowse or Video Chat or both options depending on your selection.

4. Click **Create**.

   A pop up appears on the screen confirming the request submitted to create the Integrated Cobrowse instance.
Reset Password for a Cobrowse Instance

You can access a Cobrowse instance by resetting the password.

A new link “Admin Password Reset URL” is provided in the Configuration Assistant home page for each Cobrowse instance separately. You can use the specific link to reset the password and access your Cobrowse instance.

Add Cobrowse Channels

The Cobrowse /Video Chat option allows you to add Cobrowse channels to an existing Cobrowse or Video Chat instance. This option is available on the Cobrowse page.

Add a Video Chat Channel

You can add a Video Chat channel to an existing Cobrowse instance. Use the procedure described below:

1. From the Configuration Assistant home page, click on the Cobrowse/Video Chat tab to navigate to the Cobrowse and Video Chat Cloud Service Instances section.

   The list of existing Cobrowse and Video Chat instances is displayed.

2. For any of the listed Cobrowse instances, click on the hamburger menu present on the right side of the screen.

   A drop down list with available options is displayed.

3. From the listed options, select Add Channel. A dialog box containing Cobrowse and Video Chat selection boxes appears on the screen.

   The Cobrowse option is selected and cannot be edited.

4. Select the Video Chat box. A dialog box containing the following channels appears on the screen:

   - 2-way — select this option to use video chat for both parties
   - 1-way from Agent — default option
   - 1-way from Visitor — if selected, only visitor can initiate the Video Chat
   - audio only — if selected, you can have the audio chat only
From the listed channels, select the required channel and click **Add Channel**.

A confirmation dialog appears on the screen. Click **OK**.

### Add a Cobrowse Channel

You can add a Cobrowse channel to an existing Video Chat instance. Use the procedure described below:

1. From the Configuration Assistant home page, click on the Cobrowse/Video Chat tab to navigate to the Cobrowse and Video Chat Cloud Service Instances section.

   The list of existing Cobrowse and Video Chat instances is displayed.

2. For any of the listed Video Chat instances, click on the hamburger menu present on the right side of the screen.

   A drop down list with available options is displayed.

3. From the listed options, select **Add Channel**. A dialog box containing Cobrowse and Video Chat selection boxes appears on the screen.

   The Video Chat option is selected and cannot be edited.

4. Select the Cobrowse box and click **Add Channel**.

   A confirmation dialog appears on the screen. Click **OK**.
3 RightNow Modules

Enable RightNow Modules

The Enable RightNow Modules option can be used to enable the RightNow modules for Site or Interface.

You can enable the RightNow modules from the following places in Configuration Assistant:

1. Home page
2. Site Details page
3. Interfaces tab

Enable RightNow Modules from the Home Page

The RightNow modules available to select are generally meant for all interface levels, but are limited to the interface modules that the customer has purchased under a subscription ID.

However, it is possible that a customer updates the existing subscription (UPDATE subscription) and purchases more modules. In such a case, you can enable the modules using these options. Submitting a request using these options, will only enable the modules that the customer has a subscription, but are not enabled yet. The modules that are already enabled will remain as is.

In the Configuration Assistant home page, a list of sites are present on the Home page.

1. On any of the listed sites, click **Menu**.
2. From the drop down list, click **Enable RightNow Modules**.

![Sites](image)

A dialog box appears on the screen.

3. Click **Yes** to enable Oracle Service Cloud modules for all the interfaces of the site. The interfaces include RightNow Connect, Desktop Workflow, Guided Assistance, Agent Scripting, Offer Advisor, Outlook Integration, and Sitemap, etc.
   
   A confirmation dialog appears on the screen.

4. Click **OK**.
Enable RightNow Modules from the Site Details Page

You can enable the RightNow Modules option from the Site Details page.

1. Navigate to the Site Details Page for any of the listed sites.
2. Click Menu.
3. From the drop down list, click **Enable RightNow Modules**.

The RightNow modules are enabled from the Site Details page.

Enable RightNow Modules from the Interfaces Tab

You can enable the RightNow modules for any particular interface from the Interfaces tab of Site Details page.

1. On the Site Details page, click on the Interfaces tab.
   The interfaces list appears on the screen.
2. On any particular interface, click Menu.
3. Click **Enable RightNow Modules**.
A dialog box appears on the screen.

4. Click Yes to enable RightNow Modules for the particular interface.

A confirmation dialog appears on the screen.

5. Click **OK**.
4 Chat Options

Enable Chat

The customer must be entitled for Chat option to be able to use this option.

The Enable Chat option provides a widget within the Configuration Assistant, which enables chat for a Oracle Service Cloud site or interface for a customer entitled for Chat option.

You can enable the Chat option from the following places in Configuration Assistant:

1. Home page
2. Site Details page
3. Interfaces tab

Enable Chat Option from the Home Page

You can enable the Chat option for any Oracle Service Cloud site from the Configuration Assistant home page.

In the Configuration Assistant home page, a list of sites are present on the home page.

1. On any of the listed sites, click Menu.
2. From the drop down list, click Enable Chat.

The Enable Chat dialog box appears on the screen.

3. Click Yes to enable chat for the selected interface.
   A confirmation dialog appears on the screen.
4. Click OK.

Enable Chat from the Site Details Page

You can enable the Chat option for any Oracle Service Cloud instance from the Site Details page.

1. Click a Site and navigate to the Site Details page for any of the listed sites.
2. Click Menu.
3. From the drop down list, click Enable Chat.
The Enable Chat dialog appears on the screen.
4. Click Yes to enable chat for the selected site.
   A confirmation dialog appears on the screen.
5. Click OK.

Enable Chat from the Interfaces Tab

You can enable the Chat option for any Oracle Service Cloud instance from the Interfaces tab of the Site Details page.

1. Click a Site and navigate to the Site Details page for any of the listed sites.
2. In the Site Details page, click Interfaces.
3. From the Interfaces list, click Menu on any of the particular interface for which you want to enable the chat option.
4. From the drop down list, click Enable Chat.
The Enable Chat dialog appears on the screen.
5. Click Yes to enable chat for the selected interface.
   A confirmation dialog appears on the screen.
6. Click OK.
5 Test Sites

Create a Test Site

The test site will be same as your production site because the test site is a clone of your production site.

You can create a test site by selecting the relevant option present on the CX production site.

1. From the Configuration Assistant home page, navigate to the Service Site for which you want to create a test site.
2. Click Service site link to view the site details.
3. Click menu icon and then select Create Test Site.

4. In the Create Test Site window, select a date and time using the Scheduler icon present next to Schedule box. If you do not schedule the cloning of your production site, the process will begin as soon as possible.
5. Select one of the following clone types to create a test site:
   - Full Clone — Clones a full copy of the production site into a test site
   - Sparse Clone — Clones the production configuration, customization, and last thousand incidents into a test site
   - Discreet Clone — Clones only the production configuration and customization into a test site

6. Click Create.
   A confirmation dialog with details about the selected clone type appears on the screen.
   Click Yes to proceed.
Note: When the site creation is in progress, a warning sign appears on the window. During this time, you cannot navigate to the Site Details page. If the test creation is successful, you can navigate to the Site Details page. If the site creation fails, you can request for re-creating a site.

Create and Update a Test Site

If your production site is not on the most current version of the product, you can create your test site and then update the test site to the latest version of the product available.

This option must be enabled in conjunction with a customer’s production site.

1. From the Configuration Assistant window, navigate to the Service Site for which you want to create a test site.
2. Click the menu icon and then select Create and Update Test Site.
3. Click Create.

Re-Create a Test Site

When you select the option to re-create a test site, it deletes the current test site completely and creates the test site on the same version. The option is available on CX test sites.

Note: The scheduler uses the US Pacific Time to re-create a test site.

1. From the Configuration Assistant home page, navigate to the Service site for which you want to create a test site.
2. Click the Service site link to view the site details.
3. Click the menu icon (either from the home page or from the details page) and select Re-create test site.
4. Select one of the following clone types to create a test site:
   - Full Clone — Refreshes a full copy of the production site into an existing test site
   - Sparse Clone — Refreshes the production configuration, customization, and last thousand incidents into an existing test site
   - Discreet Clone — Refreshes only the production configuration and customization into an existing test site
5. From the Re-create test site window, click Create.
   A confirmation dialog with details about the selected clone type appears on the screen.
   Click Yes to proceed.
   A dialog box appears on the screen indicating that the Test Site creation request is submitted.
6. Click OK.

Re-Create and Update a Test Site

The option to re-create and update a test site destroys, creates, and then updates the test site to the latest release available. It is enabled if an update is allowed for the test site, and is available on CX test sites only.
To re-create and update a test site.

1. From the Configuration Assistant home page, navigate to the Service site for which you want to create a test site.
2. Click the Service site link to view the site details.
3. Click the menu icon (either from the home page or from the details page) and select Re-create and update test site. A Re-create and Update Test Site window appears.
4. Click Create.

Enable Utilities for a Test Site

After you create or update test sites, you can enable utilities for the test site from the home page.

Utilities help you to process data on your test sites.

1. In the Configuration Assistant home page, click the menu icon for the selected test site and then select Enable Utilities.
2. Alternatively, you can select Enable Utilities from the in the Site Details page.
3. On the confirmation screen, click Yes to proceed.

The utilities are then enabled for your selected test site.

Notifications Tab

The Notifications tab in SSAPP provides information about the RightNow and OPA test site operations.

Status information related to the following test site operations (for RightNow and OPA) will be displayed here:

- Create Test Site
- Create and Update Test Site
- Re-create Test Site
- Re-create and Update Test Site
- Update Test Site

For each operation, the following information is displayed:

- Operation Name — Name of the test site operation
• Request Date — Date (YYYY-MM-DD) on which you requested the operation
• Site Name — Site on which the operation is performed
• Requested Schedule Date — Date (YYYY-MM-DD) on which the operation will be executed
• Operation Status
  o Scheduled — Test site operation scheduled for execution
  o In Progress — Test site operation is under execution
  o Success — Test site operation is executed successfully and ready
  o Failed — Test site operation failed
6 Test Sites for Oracle Policy Automation

Create an Oracle Policy Automation Site

Create a new site for Oracle Policy Automation (OPA) from the Configuration Assistant home page.

To create an OPA site, follow the procedure described below:

1. From the Configuration Assistant home page, click the Create Site button.
   - The Create Site window opens.
2. From the Product list, select OPA <version>.
3. In the Site Name box, enter the name for your OPA site.
   - The URL (to access your site) is automatically generated based on the site name and the default domain. You may edit the site name in the URL, if required; however, you can’t modify the default domain.
4. Click Create.
   - An Information window opens, which confirms the request submission.
5. Click Refresh (preceding Create Site button) to verify the site creation process.
   - While the site creation is in progress, the new OPA site is displayed on the home page but the navigation and menu controls are disabled.

Create a Test Site for Oracle Policy Automation

You can create and update a test site if the option is enabled to update the test site in conjunction with a customer’s production site. The option to create and update a test site is available only for CX production sites.

To create a test site, follow the steps listed below:

1. On the Configuration Assistant home page, navigate to the Oracle Policy Automation site for which you want to create a test site.
2. Click the Oracle Policy Automation site link to view the site details.
3. Click the menu icon (either from the home page or from the details page) and select Create Test Site.
   - The Create Test Site window appears.
4. Click Create.

Create and Update a Test Site for Oracle Policy Automation

You can create and update a test site if the option is enabled to update the test site in conjunction with customer’s production site. The option to create and update a test site is available only for CX production sites.

To create and update test sites, follow the steps listed below:

1. On the Configuration Assistant home page, navigate to the Oracle Policy Automation site for which you want to create a test site. Click the Policy site link to view the site details.
2. Click the menu icon (either from the home page or from the details page) and select Create and Update Test Site.
The Create and Update Test Site window appears.

3. Click **Create**.

## Update a Test Site for Oracle Policy Automation

This option is available only for Oracle Policy Automation test sites.

You can update a test site to the latest available version without destroying the test site data. This option is enabled only when the test site is not on the latest version or when there are no other operations on the parent Oracle Policy Automation site. You can also schedule updates for a future date.

1. On the Configuration Assistant home page, navigate to the Oracle Policy Automation test site for which you want to schedule an update.
2. Click the menu icon (either from the home page or from the details page) and select Update Test Site. The Update Test Site window appears.

3. To schedule an update at a later date, select the desired date from the calendar. If you do not provide a date, then the update is scheduled immediately.
4. Click **Update**.

## Re-Create a Test Site for an Oracle Policy Automation Site

For Oracle Policy Automation sites, you can create, re-create, or update test sites.

To re-create a test site, follow the steps listed below:

1. On the Configuration Assistant home page, navigate to the Oracle Policy Automation site, for which you want to re-create a test site. Click the **Oracle Policy Automation** site link to view the site details.
2. Click the **Oracle Policy Automation** site link to view the site details.
3. Click the menu icon (either from the home page or from the details page) and select Re-create Test Site. A Re-create Test Site window appears.
4. Click **Create**.

## Re-Create and Update a Test Site for an Oracle Policy Automation Site

The option to recreate and update a test site will destroy, create, and update the test site. It is enabled if an update is allowed for the test site, and is available on CX test sites only.
To recreate and update test site, follow the steps listed below:

1. On the Configuration Assistant home page, navigate to the Oracle Policy Automation site for which you want to re-create a test site. Click the Policy site link to view the site details.

2. Click the menu icon (either from the home page or from the details page) and select Re-create and Update Test Site. A Re-create and Update Test Site window appears.

3. Click Create.
7 Release Updates

Release Updates Management

The Manage My Update page allows Oracle Service Cloud (OSvC) customers to perform release update-related tasks such as:

- Check production site/upgrade site status
- Change Auto Update Program (AUP) update process start date
- Change Auto Update Program (AUP) preferences
- Change production site cutover date and time

To access the Manage My Update page, click on the Site Operations menu of a production site, and then select Manage My Update.

The Update Information Page

The Update Information page shows general information about the site and release updates, as well as the Production Status and Upgrade Site Status.
Production Site Status

The Production Site Status field shows whether the production site is undergoing a release update. If a site is undergoing a release update, it is not possible to add, delete, or rename any interface on the production site.

<table>
<thead>
<tr>
<th>Production Site Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligible for Update</td>
<td>The site is not undergoing an update. A newer version of Oracle Service Cloud is available.</td>
</tr>
<tr>
<td>Update in Flight</td>
<td>The site is undergoing an update. Production site cutover has not started.</td>
</tr>
<tr>
<td>Cutover in Progress</td>
<td>The site is undergoing an update. Production site cutover in progress.</td>
</tr>
<tr>
<td>Cutover Complete</td>
<td>The site is undergoing an update. Production site cutover has completed. Avoid refreshing test site at this stage, as the cutover post-process is not completed yet.</td>
</tr>
<tr>
<td>Post Cutover Process in Progress</td>
<td>The post cutover process starts 24 hours after the cutover. While the process is running, it is not possible to deploy custom objects or custom fields.</td>
</tr>
<tr>
<td>Post Cutover Process Complete</td>
<td>The post cutover process completed. Test sites can be refreshed after this point.</td>
</tr>
<tr>
<td>On Latest Version</td>
<td>The site is not undergoing an update. It is running on the latest version of Oracle Service Cloud.</td>
</tr>
</tbody>
</table>

Upgrade Site Status

For Oracle Service Cloud updates, an upgrade site is provided to the customer for new version verification prior to production site cutover.

It is a stand-alone site which contains a copy of production site data, configuration, and customizations. An upgrade site is a dedicated test environment for release update, and should not be used for any other purposes.

The Upgrade Site Status field shows the status of an upgrade site, i.e., whether it is being created or whether it is available. While an upgrade site is being created, it is not possible to deploy custom objects or custom fields. The upgrade site only exists until production site cutover, and after that point it becomes unavailable. This is because the file system from the upgrade site will become the production site file system on cutover.

<table>
<thead>
<tr>
<th>Upgrade Site Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting</td>
<td>The site is not undergoing an update. A newer version of Oracle Service Cloud is available.</td>
</tr>
<tr>
<td>Waiting for Verification</td>
<td>The site is undergoing an update. The target version has not been confirmed. This status applies to legacy sites only.</td>
</tr>
<tr>
<td>Waiting to Clone</td>
<td>The site undergoing an update. Upgrade site creation has not started.</td>
</tr>
<tr>
<td>Being Created</td>
<td>The site is undergoing an update. Upgrade site creation is in progress.</td>
</tr>
<tr>
<td>Active</td>
<td>The site is undergoing an update. An upgrade site is available for testing.</td>
</tr>
</tbody>
</table>
Upgrade Site Status | Description
--- | ---
Cutover in Progress | The site is undergoing an update. Production site cutover in progress.
Cutover Complete | The site is undergoing an update. Production site cutover has completed.
Complete | The site is not undergoing an update. The upgrade site is no longer available.
Cancelled | The update is cancelled. The upgrade site will be deleted soon.

Update Information

The Update Information section shows general release update related information for an Oracle Service Cloud site, and allows modifications of some of the fields appearing on this page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Version</td>
<td>The Oracle Service Cloud version currently in use on the production site.</td>
<td></td>
</tr>
<tr>
<td>Update to Version</td>
<td>The target version for production site update.</td>
<td></td>
</tr>
<tr>
<td>Upgrade Site Creation Date</td>
<td>The date upgrade site creation starts</td>
<td>AUP sites only</td>
</tr>
<tr>
<td>Cutover Forecast Date</td>
<td>The forecasted date and time the production site version will be updated.</td>
<td>This is calculated based on AUP preferences and is shown for AUP sites only. Replaced with &quot;Cutover Date and Time&quot; once the actual cutover date and time becomes available. This is a calculated value and cannot be changed.</td>
</tr>
<tr>
<td>Cutover Date and Time</td>
<td>The date and time the production site version will be updated.</td>
<td>Cutover date and time are not available before upgrade site creation and can only be changed after upgrade site creation.</td>
</tr>
<tr>
<td>Utility Delay</td>
<td>The number of hours OSvC product utilities will be paused after cutover.</td>
<td>Utility Delay cannot be changed unless the site is undergoing an update. To check whether the site is undergoing an update, please refer to the Production Status section.</td>
</tr>
</tbody>
</table>

Oracle Service Cloud Update Process

The update process start dates for Auto Update Program (AUP) sites are set in advance, and AUP customers receive two email notifications in advance, which contain the Oracle Service Cloud site name and the upgrade site creation date.
You can use one of the following options to change the upgrade site creation date:

- Auto Update Sites
- Legacy Update Sites

**Change the Site Creation Date for an Auto Update Site**

Use the following procedure to change the upgrade site creation date for Auto Update Program sites:

1. From the Configuration Assistant home page, click Site Operations floating submenu on the right side of your Oracle Service Cloud site, and then select Manage My Update.
2. Click on the Change link present on the right side of the Upgrade Site Creation Date.
3. Type the date in YYYY-MM-DD format, or click on the Calendar icon to select a new date. The time zone must be Pacific Time.
4. Click Save.

**Change the Site Creation Date for a Legacy Update Site**

Use the following procedure to change the upgrade site creation date for legacy update sites:

1. From the Configuration Assistant home page, click Site Operations floating submenu on the right side of your Oracle Service Cloud site, and then select Manage My Update.
2. Click Request Update.
   A confirmation message appears on the screen.
3. Click OK.

**Reschedule Production Site Cutover**

The Upgrade Site creation must be complete before rescheduling the production site cutover.

Use the following procedure to reschedule production site cutover:

1. From the Configuration Assistant home page, click on the Site Operations floating submenu on the right side of your Oracle Service Cloud site, and then select Manage My Update.
2. Click on the Change link present on the right side of the Cutover Date and Time.
3. Type the date in YYYY-MM-DD format, or click on the Calendar icon and select a new date.
4. From the drop-down list, select the time in Pacific Daylight Time or Pacific Standard Time depending on whether the United States is using daylight saving on the day of cutover or not.
5. Click Save.

**Change Utility Delay**

Utility Delay gives time after the update to review and make any necessary changes to the site before running the utilities. If you want all utilities to start immediately after the cutover, set this value to 0 hours.
Use the procedure below to modify Utility Delay:

1. From the Configuration Assistant home page, click on the Site Operations floating submenu present on the right side of your Oracle Service Cloud site, and then select Manage My Update.
2. Click on the Change link present on the right side of the Utility Delay.
3. From the drop-down list, select the number of hours for utilities to be delayed.
4. Click Save.

**Note:** The maximum Utility Delay allowed in Configuration Assistant is four hours. If there is a need to set this value to more than four hours, please raise a service request.

Refresh an Auto Upgrade Site

An Auto Update Program (AUP) upgrade site can be recreated, if required; this is called a site refresh.

A refresh destroys an existing upgrade site and creates a new upgrade site from a fresh clone of production. If you have made any changes to your production CP pages, configuration settings, and message bases, you may want to refresh your upgrade site. This is different from File Sync where the CP pages are synchronised from the production site to upgrade site eight hours before the cutover.

Use the following procedure to refresh an upgrade site:

1. From the Configuration Assistant home page, click on the Site Operations flyout menu on the right side of your Oracle Service Cloud site, and select Manage My Update.
2. Under the Update Information section, click on the Refresh Upgrade Site button.
3. Read the Disclaimer Statement, and click Yes to proceed with the upgrade site refresh.

On successful completion, an e-mail notification is sent to all the contacts associated with the AUP service request.

**Note:** The upgrade site refresh is available only for AUP sites that are on August 2016 version or later, and the cutover date is more than seven days away.

**Note:** If the upgrade site refresh is not complete before the scheduled cutover, the cutover will be postponed. Please note that it is not possible to find out the time required to complete the upgrade site refresh.

Opt Out of a Release

You can opt out of an AUP cycle in some cases.

It is possible only if:

- The upgrade site creation has not started
- Skipping releases does not result in the production site version becoming older than one year
- The site is not locked into a version
To opt out of a release, follow the steps below:

1. From the Configuration Assistant home page, click on the **Site Operations** flyout menu on the right side of your Oracle Service Cloud site, and select **Manage My Update**.
2. Under the Update Information section, click on the **Skip Update** link.
3. Click **OK** to opt out of the current release.

### Opt Back into a Release

You can opt back into a release, if required.

Follow the steps below to opt back into a release:

1. From the Configuration Assistant home page, click on the **Site Operations** flyout menu on the right side of your Oracle Service Cloud site, and select **Manage My Update**.
2. Under the Update Information – Update Forecast section, click on the **Opt-In** link.
3. Select a new date for upgrade site creation, and click **Save**.

### Complete the Update Checklist for a Legacy Update Site

If a site is not eligible to enrol in the Auto Update Program (AUP), the Update Checklist must be completed prior to cutover.

If you do not select the mandatory tasks in the list, the cutover will not take place. The Update Checklist button becomes visible after the upgrade site creation completes and it remains visible until the cutover starts.

1. From the Configuration Assistant home page, click on the **Site Operations** flyout menu on the right side of your Oracle Service Cloud site, and select **Manage My Update**.
2. Under the Update Information section, click **Update Checklist** button.
3. Expand the folders under the Pre-Upgrade Checklist to find out which tasks are mandatory.
4. When a task is completed, select the box next to the completed task and click **Submit** at the bottom of the page.

### The Update Preferences Page

Update Preferences shows preferences information configured in the update system for an Oracle Service Cloud site. While most of the preferences are for Auto Update Program (AUP) sites, there are some preferences which are applicable to both AUP and legacy sites. These preferences allow customers to control the timing and frequency of their OSvC site updates.

<table>
<thead>
<tr>
<th>Preference</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Versions</td>
<td>AUP sites are opted into one or more versions to ensure that a release update takes place at least once a year. Currently, the version preference is in read-only format. To modify this preference, click Contact Technical Support link to raise a service request.</td>
</tr>
<tr>
<td>Site Creation Date</td>
<td>Upgrade site creation date for AUP sites can be configured here. While an upgrade site is being created, custom objects and custom fields cannot be deployed. Hence, in this case, the day of the week should be set to a non-working day, such as Saturday, and in the Pacific Time.</td>
</tr>
</tbody>
</table>
Preference | Notes
--- | ---
Cutover Preferences | Cutover date preference is set as a number of days after upgrade site creation starts, and this should reflect the duration of the user acceptance-testing period. Though the cutover date is calculated and established using the Cutover Preferences value, the cutover date can be rescheduled later, if needed. For more information, see the Reschedule Production Site Cutover section. For some sites, the utility delay is set to 0 hours. Therefore, all the utilities start running after cutover. Setting this to a non-zero value results in utilities not running until the specified delay period ends, which allows some tests to be performed before utilities start processing data.
Language | This preference determines the language of email notifications sent from a release update incident on the Oracle support site. Update incidents are used for automated communications about release update and cutover, and they can be used to contact Oracle with general update related enquiries. Currently, English and Japanese languages are available for selection.

**Change Update Preferences**

Use the procedure below to change Update Preferences:

1. From the Configuration Assistant home page, click on the Site Operations floating submenu on the right side of your Oracle Service Cloud site, and then select Manage My Update.
2. On the Manage My Update page, select Update Preferences option.
3. Modify the Preferences as required.
4. Click Save.

**More Update-Related Information**

The Update-Related Documentation section contains links to knowledge base articles on the Oracle Support Site. In order to view these articles, you must have valid credentials on the Oracle Support Site. If you do not have the credentials, contact Oracle Service Cloud administrator within your organization to create a support site login account linked to the organization.

† **Note:** Do not create a support site account on your own; as this will result in an account not being linked to the correct organization.

<table>
<thead>
<tr>
<th>Document</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Guides</td>
<td>Update Guides provide general information related to the Oracle Service Cloud release update, and contain a section that covers main changes between the production site version and the target version.</td>
</tr>
<tr>
<td>Change Freeze Information</td>
<td>When an Oracle Service Cloud site undergoes an update, a number of restrictions such as change freeze on certain components apply. This article provides information on release update related restrictions.</td>
</tr>
<tr>
<td>System Requirements</td>
<td>This article covers the minimum Software and Hardware requirements for running Oracle Service Cloud.</td>
</tr>
<tr>
<td>Maintenance Pack Information</td>
<td>Maintenance Packs are applied to the Oracle Service Cloud Sites automatically. This article contains general information about product updates, and a link to maintenance pack release schedule information.</td>
</tr>
</tbody>
</table>
### Document Description

<table>
<thead>
<tr>
<th>Document</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Update Program</td>
<td>This article contains information about Auto Update Program (AUP).</td>
</tr>
<tr>
<td>Change Documents</td>
<td>Changes to existing functionality in a new version are documented in a number of places. This article contains links to documents that provide information about the changes that will occur as a result of an update.</td>
</tr>
</tbody>
</table>

### Reset the System Administrator Password

Your Oracle Service Cloud site has a system-defined administrator account, known as the System Administrator.

By default, the System Administrator is granted the highest level of permissions available that includes all possible permissions. The System Administrator uses the “administrator” login on Oracle Service Cloud sites and the “admin” login on OPA sites.

1. From the Configuration Assistant home page, click the OPA or Service site for which you want to reset the System Administrator password.
2. Click the menu icon and select Reset Admin Password.

3. Click Yes to confirm the password reset. If successful, a message appears that the System Administrator password has been reset, and that an email containing the new password has been sent to your email address.
4. Click OK.
8 Interface Management

Add an Interface

You can add an interface to a Oracle Service Cloud site.

1. From the Configuration Assistant home page, click the Service site to which you want to add an interface.
2. In the Site Details page, click Interfaces tile. The Interfaces page appears.
3. Click Create Interface.
   The Create Interface window opens.
4. In the Create Interface window, provide the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interface name</td>
<td>Enter the name of the interface. This field accepts alphanumeric characters but cannot contain spaces. The name also cannot start or end with an underscore.</td>
</tr>
<tr>
<td>URL</td>
<td>Enter the URL of the virtual host (vhost) for your site.</td>
</tr>
<tr>
<td>Language</td>
<td>See Select the language you want this interface to use. For a list of available languages, see Answer ID 318 on the Oracle Service Cloud support site.</td>
</tr>
<tr>
<td>Timezone</td>
<td>Select the time zone you want this interface.</td>
</tr>
<tr>
<td>Look and Feel Form</td>
<td>Select the formatting style you want applied to the user interface.</td>
</tr>
</tbody>
</table>

5. Click Create.
If successful, a message confirms that your request to add an interface has been submitted.
6. Click OK.
The new interface appears at the bottom of the list on the Interfaces page but the navigation and menu controls are disabled while the creation is still in progress.

Once the process completes, you may need to click Refresh List to update the list of interfaces that displays on the page. When complete, you'll see the following information:
Edit an Interface

You can edit an interface of a Service.

1. From the Configuration Assistant home page, click the Service site to which you want to edit an interface. The Site Details page opens.
2. From the Site Details page, click the menu icon next to the Customer Portal URL label and select Edit. The Edit Interface window opens.
3. Click Save.

Complete the following field information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interface name</td>
<td>This is a read-only field when editing an interface.</td>
</tr>
<tr>
<td>URL</td>
<td>Type the URL of the virtual host (vhost) for your site.</td>
</tr>
<tr>
<td>Language</td>
<td>This is a read-only field when editing an interface. For a list of available languages, see Answer ID 318 on the Oracle Service Cloud support site.</td>
</tr>
<tr>
<td>Timezone</td>
<td>Select the time zone you want for this interface.</td>
</tr>
<tr>
<td>Look and Feel Form</td>
<td>This read-only section lists the products and components available in Oracle Service Cloud. The check boxes selected are the products and components that are enabled on your interface</td>
</tr>
</tbody>
</table>

**Note:** To purchase additional products or components, contact your Oracle account manager.

Once the process completes, you may need to click Refresh List to update the list of interfaces that displays on the page.
9 Mailbox Management

Mailboxes

You can add and edit mailboxes to your Oracle Service Cloud site, including Oracle-managed Service mailboxes.

Note: To ensure accurate processing of replies, inbound messages, and bounces, you must set up one mailbox for Service.

Once you have created a new mailbox, you can disable it or delete it; but you cannot change any other attributes associated with the mailbox from the Configuration Assistant. If you want to change the mailbox name that is displayed to your customers, you can do so from the Service application. Mailbox configuration options available from Service include the following:

- Brand your mailbox to match your organization’s brand identity
- Define the bounce address that will be used as the return path for bounced emails
- Define the display name you want to appear on outgoing messages as the sender

Add a Mailbox

If you are using the August 2013 release or later of Oracle Service Cloud Service, mailboxes are configured automatically as Oracle-managed Service mailboxes.

Additional mailbox configuration options are available in the Service application, including branding your mailbox and defining the bounce address and the display name.

To add a mailbox, follow the steps listed below:

1. From the Configuration Assistant home page, click the Service site to which you want to add a mailbox. The Site Details page opens.
2. Click Mailboxes and then click Create Mailbox. The Create Mailbox window opens.
3. Complete the following field information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailbox name</td>
<td>Enter the mailbox name in this field. The field is limited to 80 characters and cannot start with a number, contain spaces, or consecutive underscores. The name can contain only lowercase letters, numbers, underscores, periods, and dashes.</td>
</tr>
<tr>
<td>Mailbox Type</td>
<td>Select the mailbox type, Service or Outreach.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Service and Outreach mailboxes are used with Oracle Service Cloud applications. Outreach mailboxes need further manual configuration. See View details to configure outreach mailbox section for details.</td>
</tr>
<tr>
<td>Enabled</td>
<td>This read-only field is enabled by default.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can disable this field by clearing the check box after the mailbox has been created. See To edit a mailbox.</td>
</tr>
<tr>
<td>Interface</td>
<td>Select the interface you want to associate the mailbox with.</td>
</tr>
</tbody>
</table>

4. Click Create.

You may need to click Refresh List to see your new mailbox display on the Mailboxes page. If the procedure to create a mailbox is successful, you will receive an email containing your new mailbox password.

**View Mailbox Details**

Once you have created a new mailbox, you can disable it or delete it; but you cannot change any other attributes associated with the mailbox from the Configuration Assistant..
Follow these steps to view details on configuring an Outreach mailbox

1. From the Mailboxes page, click the menu icon next to the Mailbox Type label (Outreach) and select View Details. The View Mailbox Details window opens.
2. Make a note of the details and then click OK.
3. Go to the Mailboxes Configuration page to manually configure the Outreach mailbox with the given information.

Edit a Mailbox

You can add mailboxes and edit existing mailboxes to your Oracle Service Cloud site, including Oracle-managed Service mailboxes.

1. From the Mailboxes page, click the menu icon next to the Mailbox Type label and select Edit. The Edit Mailbox window opens.
2. To disable a mailbox, deselect the Enabled check box.

   ✔ Note: If you disable a mailbox, email sent to the address associated with the mailbox continues to accumulate. However, it is not delivered.
3. To enable a mailbox, select the Enabled check box.

   ✔ Note: When you enable a mailbox, all emails that accumulated while this mailbox was disabled are delivered.
4. Click Save.
   If successful, a message tells that your changes were made.
5. Click OK.

   ✔ Note: The Configuration Assistant lets you edit only the mailbox’s Enabled check box. Additional mailbox configuration options are available in the Service application.

Delete a Mailbox

Deleting a mailbox is a permanent action.

If you delete a mailbox that is associated with an e-mail address your customers use, any e-mail sent to that address will be rejected and you will not receive it.

1. From the Mailboxes page, click the icon next to the Mailbox Type label and select Delete.
2. Click Yes to confirm the mailbox deletion.
   You may need to click Refresh List to remove the mailbox from the list of mailboxes that is displayed on the Mailboxes page.
Reset a Mailbox Password

You have the option to reset your mailbox password.

To reset mailbox password, follow the steps listed below:

1. From the Mailboxes page, click the icon next to the Mailbox Type label and select Reset Password.
2. Click Yes to confirm the mailbox password reset.
   If successful, a message tells you the password has been reset and a new one has been sent to your email address.
3. Click OK.
10 Cloud Integrations and Product Add-Ons Enablement

Product Add-Ons

The Configuration Assistant lets you enable and automatically connect to certain integrations and product add-ons based on the Oracle Cloud applications and Oracle Service Cloud product add-ons your organization has purchased. Once purchased, you can enable the following offerings from the Configuration Assistant:

- Smart Interaction Hub (SIH)
- Oracle Social Network (OSN)
- Browser User Interface (BUI)
- Oracle Policy Automation (OPA)

Enable Smart Interaction Hub or Oracle Social Network

You can connect to some of the integrations and product add-ons based on the Oracle Cloud applications and Oracle Service Cloud product add-ons that your organization has purchased.

To enable Smart Interaction Hub or Oracle Social Network, follow the steps listed below:

1. From the Configuration Assistant home page, click the Service site for which you want to enable an integration or product add-on.
2. From the Site Details page, click **Integrations** tile.
   The Service Integrations page opens listing all the integrations and product add-ons your organization has purchased.
3. Click the Enable button next to the integration or product add-on that you want to enable, Smart Interaction Hub (SIH) or Oracle Social Network (OSN).

4. Click Yes to confirm the enablement.
   The enablement process can take several minutes to complete.

5. Click Refresh Page to verify the enablement process and to update the list of enabled integrations and product add-ons that displays on the page.
   If successful, the integration or add-on displays on the page and the Enable button no longer displays.
   If the enablement fails, a dialog appears on the screen. You can either request to enable OSN again or contact Oracle Support. If you choose to enable OSN again, a confirmation dialog appears on the screen.

6. Click Yes.

Enable the Browser User Interface

The Browser User Interface (Browser UI) is supported for the last five Oracle Service Cloud releases.

Therefore, to continue the Browser UI support, you must update Oracle Service Cloud at least once a year. In order to leverage the latest features of Agent Browser UI, we recommend you join the Automatic Update Program and use the latest version of Oracle Service Cloud.

When enabled, the Browser UI displays the URL to access the interface for your service site.

To enable the Browser UI, follow the steps listed below:

1. From the Configuration Assistant home page, click the service site for which you want to enable an integration or a product add-on.
2. Click Integrations tile. The Service Integrations page opens listing all the integrations and product add-ons your organization has purchased.
3. Click the Enable BUI button in the Browser User Interface (BUI) section at the end of the page.

4. On the confirmation window, click Yes to confirm the enablement.
   When the operation is complete, a confirmation window appears.

Enable Integrations for RightNow and Oracle Policy Automation Sites

The Configuration Assistant lets you enable and automatically connect to certain integrations and product add-ons based on the Oracle Cloud applications and Oracle Service Cloud product add-ons your organization has purchased.
To enable integrations for RightNow or Oracle Policy Automation sites, follow the steps listed below:

1. From the Configuration Assistant home page, click the Service site for which you want to enable an integration or product add-on.
   The Site Details page opens.
2. Click **Integrations** tile.
   The Service Integrations page opens listing all the integrations and product add-ons.
3. From the Service Integrations page, click **Enable OPA**.

   ![Enable OPA window](image)

   The Integration window opens.

4. From the OPA Site drop down list, select Policy Automation Site.
5. Click **Yes** to confirm the enablement.
   The enablement process can take several minutes to complete. An Information window opens that confirms request submission.
6. Click **OK**.
7. Click **Refresh Page** to verify the enablement process and to update the list of enabled integrations and product add-ons that display on the page.
   If successful, the integration or add-on displays on the page and the Enable button is no longer displayed.
11 SSL Certificates

View SSL Certificates

To view the SSL certificates:

- From the Configuration Assistant homepage, click SSL Certificates.

The SSL certificate opens.

The SSL Certificates window shows SSL entitlements, the status of installed certificates, and the selection menus to further manage individual certificates.

Note: As of now, Configuration Assistant supports only production instances. If you want to make any changes to your test or development sites, please contact the Oracle Service Cloud Technical Support for assistance.

You can view the SSL Certificate details for any of the listed SSL Certificates.

On the SSL Certificates window, click the menu icon for the appropriate site and select View Details.

Generate a Certificate Signing Request

It is important that the information provided when generating the CSR in Configuration Assistant is the same as that given to the third-party certificate vendor when requesting the certificate.

Note: A third-party certificate is needed from DigiCert with “Apache” specified as the server platform. Although the Configuration Assistant will not technically block the uploading of multiple certificate vendors, DigiCert is the only supported vendor from the Oracle Service Cloud product perspective.

1. From the SSL Certificates page, click Generate CSR.
   The Generate Certificate Signing Request (CSR) window opens.
2. Complete the following field information:
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Name</td>
<td>Enter a fully qualified domain name (FQDN) or the web address for the area of your site customers will connect to using SSL.</td>
</tr>
<tr>
<td>Vhost (Subject Alternative Names)</td>
<td>Enter the list of your SANs.</td>
</tr>
<tr>
<td>Organization</td>
<td>Enter the legal name of your organization.</td>
</tr>
<tr>
<td>Note: Do not use symbols &amp; or @ or any other symbols that use the shift key.</td>
<td></td>
</tr>
<tr>
<td>Organizational Unit</td>
<td>Enter the certificate management division of your organization.</td>
</tr>
<tr>
<td>City</td>
<td>Enter the city where your organization is located.</td>
</tr>
<tr>
<td>State</td>
<td>Enter the state where your organization is located.</td>
</tr>
<tr>
<td>Country</td>
<td>Enter the two-letter ISO country code where your organization is located.</td>
</tr>
</tbody>
</table>

3. Click **Create** to generate the CSR.  
   Once the CSR is generated, the certificate status changes to Cert Needed.
Download a Certificate Signing Request

You can manage SSL certificates, including downloading a CSR, from the Configuration Assistant.

You can download a CSR from the SSL Certificates page. You need to click the menu icon and select Download CSR.

![Download CSR](image)

Upload an SSL Certificate

You can manage your SSL certificates, which can include uploading an SSL certificate.

To upload a SSL certificate:

1. From the SSL Certificates page, click the menu icon and then select Upload Certificate.
   The Upload SSL Certificate opens.
2. On the Upload SSL Certificate window, click Browse and select the appropriate certificate.
3. Click Upload.
   An Information window opens confirming the certificate was uploaded. Once the certificate is uploaded, the certificate status changes to Provisioned.

⚠️ Note: Once a certificate is provisioned, the menu icon changes to include both Activate and Delete options. Keep in mind you can’t delete activated certificates.

Activate an SSL Certificate

- Prior to activation, the DNS Administrator must change the CNAME record. Contact your DNS Administrator to put a CNAME entry in your DNS server that points to the appropriate domain. For example, example_domain.com IN CNAME example.custhelp.com
- The activation will not be allowed if DNS is not properly configured by your DNS Administrator.
- You must use a CNAME and not an A record for redundancy and reliability. Oracle Cloud Operations recommends customers create CNAME records to link customer-owned, branded domains to the custhelp domain(s) provided within the default CX application.
- The use of CNAME records is a powerful and flexible solution that allows the underlying Oracle IP address to change if necessary without requiring customers to update their DNS. Our customers report the best experience when using CNAME records over A records.
1. From the SSL Certificates page, click the menu icon and then select Activate. The Activate SSL Certificate window opens.

2. From the SSL Requirement drop-down list, select the SSL type that has to be installed.

<table>
<thead>
<tr>
<th>Requirement Types</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Requests to HTTP and HTTPS behave normally.</td>
</tr>
<tr>
<td>SSL Only</td>
<td>Requests to HTTPS are accepted but requests to HTTP are rejected.</td>
</tr>
<tr>
<td>SSL Redirect</td>
<td>Requests to HTTP are automatically redirected to HTTPS.</td>
</tr>
</tbody>
</table>

3. Select the interface from which the certificate is to be activated from the Interface Configuration list.

4. Type the domain name in the Vhost (Alternate Vhost Name) field, and then click Activate. An Information window confirms activation. The certificate status changes to Active.

Renew an Existing SSL Certificate

You can manage your SSL certificate using Configuration Assistant.

To renew an existing SSL certificate:

1. From the SSL Certificates home page, click the menu icon for the service you wish to renew the certificate.
2. If the certificate status for the service is still active, select Request Renew CSR.
The request is processed instantly. A new CSR appears in the SSL certificates list with the same name. This is the CSR generated to renew the existing certificate. Once complete, the certificate status changes to Provisioned or Cert Needed.

3. From the SSL Certificates home page, select Download Renewed Certificate option to download the renewed CSR. You can find this option on the renewed CSR’s menu icon.

   **Note:** You must purchase or renew the certificate from DigiCert or your preferred, publicly trusted Certificate Authority with this renewed CSR.

4. From the service’s menu icon on the SSL Certificates home page, select Upload Renewed Certificate. An Upload SSL window appears.
   - Click Choose File and select the renewed .csr file.
   - Click Upload.

Once the renewed certificate is uploaded, the certificate status changes to Provisioned.

5. From the service’s menu icon on the SSL Certificates home page, select Activate Renewed Certificate. A Confirm Activate Renewed Certificate window appears.

6. Click **Activate**. An Information window appears confirming the certificate was successfully activated.

**View Subscription Details**

The Subscriptions page displays customer subscriptions and details, including the start and end dates of the subscription and all components that are part of the respective subscription.

- To view the subscription details, click **Subscriptions** from the Configuration Assistant Home Page.
12 Data and Usage Statistics

View Current Usage Statistics

The Statistics page displays average data and storage statistics as well as historical average data usage and record count.

To view current usage statistics, click Statistics from the Configuration Assistant home page.

The record count and storage graph displays the average record count and data storage statistics for top-10 tables (by data size) for the latest available week, sorted by data size.

The Data Storage table displays the average record count and data storage statistics for all tables, for the latest available week, sorted by total storage.

Data Storage Table

In the Data Storage table, you can export data, format data, and customize the columns you want to display.

The Data Storage table appears as follows:

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Record Count(K)</th>
<th>Storage(KB)</th>
<th>Index Size(KB)</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phrases</td>
<td>2,673,789</td>
<td>133,738,409</td>
<td>70,396,580</td>
<td>14.47</td>
</tr>
<tr>
<td>Contacts</td>
<td>129,664</td>
<td>15,288,240</td>
<td>63,606,424</td>
<td>5.59</td>
</tr>
<tr>
<td>Incident Performance</td>
<td>239,342</td>
<td>18,724,628</td>
<td>42,872,572</td>
<td>4.36</td>
</tr>
<tr>
<td>Opportunity Phrases</td>
<td>478,477</td>
<td>22,569,550</td>
<td>32,148,226</td>
<td>3.87</td>
</tr>
<tr>
<td>Opportunities</td>
<td>36,103</td>
<td>14,012,121</td>
<td>31,554,666</td>
<td>3.23</td>
</tr>
<tr>
<td>Marketing Activities</td>
<td>120,775</td>
<td>7,730,809</td>
<td>34,322,549</td>
<td>2.98</td>
</tr>
<tr>
<td>Incidents</td>
<td>45,331</td>
<td>10,387,493</td>
<td>21,838,575</td>
<td>2.28</td>
</tr>
<tr>
<td>Products to Quotes</td>
<td>86,873</td>
<td>10,957,600</td>
<td>3,071,246</td>
<td>0.99</td>
</tr>
<tr>
<td>Archived Incidents</td>
<td>42,957</td>
<td>6,689,910</td>
<td>6,515,851</td>
<td>0.93</td>
</tr>
<tr>
<td>Deleted Records</td>
<td>85,411</td>
<td>5,712,642</td>
<td>4,322,230</td>
<td>0.71</td>
</tr>
</tbody>
</table>

Record Count: 404
Manage the Data Storage Table

1. To export usage data to a spreadsheet, from the Menu option, click **Export to Excel**. Data displayed on the table is saved to a spreadsheet.

2. To customize the column display, from the View menu, click **Columns**.
   - Select or clear the columns to be displayed as required.
   - To sort the columns, from the View menu, click **Sort**.
     - Select a column header to sort.
     - From the Sort menu, click the arrows or select either Ascending or Descending option.
   - To further refine your display, from the Sort menu, select Advanced. In the Advanced Sort dialog box, select the following:
     - Sort By: Select the main column to sort by. For example, Table Name. Select either the Ascending or Descending order.
     - Then By: (Optional). Select the second column to sort by. For example, Storage. Select either the Ascending or Descending order.
     - Then By: (Optional). Select the third column to sort by. For example, Percent. Select either the Ascending or Descending order.

3. To format the data storage table, click **Format**. You can resize columns or use the column wrap to format data within the cells.
   - Select a column header.
   - To resize, from the Format menu, click Resize Columns.
     - In the Resize Column dialog box, enter the preferred width.
     - Select the unit, either Pixels or Percent.
     - Click **OK**.
   - To wrap text within the cells, from the Format menu, select Wrap.

4. To freeze a column, select the column header and click **Freeze**. This is useful for tables with multiple columns.

5. To wrap text within the cells of a column, select a column header and click **Wrap**.

View Historical Usage Statistics

The Historical Statistics section displays historical data including the number of records in the database and storage utilization.
To view historical data, you can select the following:

- **Month View/Quarterly View/Yearly View link**: Displays corresponding monthly, quarterly or yearly average data usage in the form of a graph for a selected table.

- **Table Name**: Select the table name for which you want to view historical utilization, that is, the average record count and the average data storage for the selected period (monthly, quarterly, or yearly). Displays data usage in the form of a graph.