

Oracle iSupport: From Customer Contact to Resolution



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Session Objectives

Session Objectives

During this session you will learn about:

- ☐ The customer view of iSupport
- ☐ How a customer can create a request for service online
- ☐ How the service request information flows into Oracle Customer Support for resolution by a customer service team

During this session, I will not cover:

- ☐ Return Material Authorizations (RMA's)
- ☐ Service request details
- ☐ Technical set up of Oracle iSupport or Customer Support

Overview

Introduction to iSupport

The iSupport application within the Oracle CRM suite provides your customers with an avenue for self-service support. Your organization can use iSupport to streamline its customer support processes and improve its customer support capability.

Oracle iSupport Web page consists of five tabs:

- ❑ Home
- ❑ Accounts
- ❑ Products
- ❑ Support
- ❑ Forum

Home

Your customers can personalize their Home page with information such as service request activity and knowledge base search results. Your organization can include product alerts, company news, and other important information on the customer's iSupport Home page.

Accounts

The Accounts tab gives your customers access to their invoices, payments, shipment information, returns, and service contracts via a Web interface on a 24/7 basis. The Returns functionality assists your customers with creating Return Material Authorizations (RMAs) online.

Products

With the Products tab, your customers can access their Install Base data. They can also add products to their Install Base by using this iSupport feature.

Support

Service Request — Lets your customers submit and manage their service requests online. Your company can offer or enforce knowledge base solutions as well as enforce product association during service request creation. Your company can also setup and use customized templates to gather service request information when your customers create their requests for service.

Call Me — Allows your customers to submit callback requests via the Web. The Surveys feature allows your company to provide questionnaires to your customers in order to gather pertinent feedback.

Knowledge Management — A comprehensive solution management system, this feature enables companies to create, store, and score known technical problem solutions.

Forum

Interactive forums allow customers to search for information, post questions, and share technical knowledge with other users.

iSupport Integration Points

AOL - A required dependency of all Oracle applications. AOL provides technology and common libraries for Oracle applications.

Workflow - Provides the ability to send e-mail notifications, and allows you to define various workflow processes required for normal business operations.

Trading Community - The 11i Oracle Trading Community Model -- also known as Oracle Trading Community Architecture or TCA -- is comprised of a database schema, APIs, and data quality management utilities that allow your company to capture and use information about your commercial community: organizations, people, places, and the network of relationships that bring them together. Both the ERP and CRM applications use the Trading Community Architecture.

Accounts Receivable - Provides customer account data for Oracle iSupport. After your customer books an order in an Oracle CRM application, the system creates an account in AR.

General Ledger - Oracle iSupport uses General Ledger to set up ledgers and books, store exchange rates, and store related business information.

Order Management (OM) - Provides returns functionality within Oracle iSupport.

Install Base and Inventory - Inventory provides the underpinnings that encompass your company's product repository and configuration. It integrates closely with Install Base, the customer- or party-purchased products repository. Both applications furnish product information when your customers use the Support or Products tabs in iSupport.

HRMS - Employee resources for CRM are imported from the HRMS applications.

CRM Technology Foundation - A prerequisite for any Oracle CRM module. The technology stack supplies debug logging trails and cookie encryption.

CRM Foundation - Supplies much of the data and functionality for iSupport. To use iSupport, you must implement the CRM Foundation.

Support (also called TeleService) - Contains the Service Request functionality that enables your customers to submit, view, edit, and manage their service requests online.

Contracts Suite - Provides information on service contracts and warranties. The Contracts Suite is comprised of Contracts Core and Contracts for Service.

Capture (OC) APIs - Order Capture APIs provide Returns functionality in Oracle iSupport.

Web Call-Back (Call Me) - Lets your customers submit a callback request through the Oracle iSupport UI. The Web callback requires that your company purchase call center hardware and implement the following:

- ☐ CRM Interaction Center (formerly Call Center Technology - CCT)
- ☐ Universal Work Queue (UWQ)
- ☐ Oracle Customer Care
- ☐ CRM Foundation Notes functionality

Scripting - Oracle iSupport uses Oracle Scripting to provide Surveys functionality. Scripting also presents scripts to the desktop of an Interaction Center agent to aid customer service.

iSupport Process (sample)

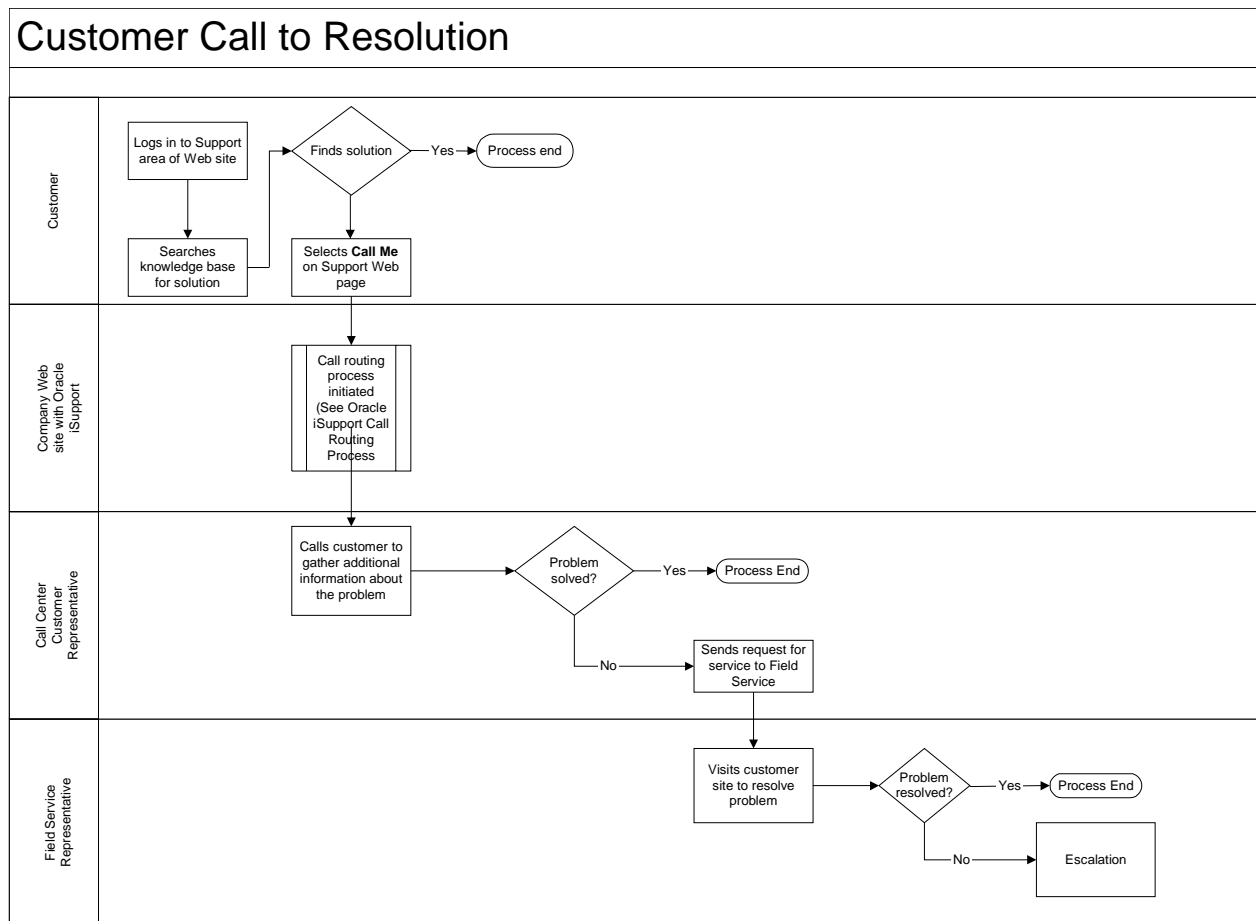


Figure 1: Sample Process for iSupport using Web Call-Back

Process Steps

- Customer goes to your company support page.
- At the iSupport login page, your customer must do one of the following:
 - If s/he is already registered, enter a **User ID** and password and click **Go**.
 - If s/he is *not* registered, click **Register Here** to begin the registration process.
- After the Home page launches, your customer can do any of the following:
 - Search your company's knowledge base for a solution
 - Go to the Forum tab to review other customers' posts or to post a message.
 - Create a request for service
 - Go to the Support tab to use the **Call Me** feature.
- If a solution is not found using the knowledge base or Forum, your customer creates a service request. Your customer can also use **Call Me** to get assistance with a problem.
- Oracle iSupport uses automated processing for routing service requests and customer call requests to the appropriate customer service team.

- 6 When a member of the customer service team checks the Universal Work Queue, the customer's request appears in the team's queue.
- 7 A team member takes the service request and follows up with the customer, arranging for:
 - a. RMA
 - b. Repair (off site or field service visit)

Customer Visit to iSupport

Customer's View: Registration

When you company's customer wants support for a product s/he can open a browser and go to your company's Web based support pages.

[http://www.\[domainname\].com:8002/OA_HTML/jtflogin.jsp](http://www.[domainname].com:8002/OA_HTML/jtflogin.jsp)

Welcome to Oracle eBusiness Suite

Login

User ID

Password

[Register Here](#)

About Oracle e-business suite!

In a marketplace where speed provides a competitive advantage, your choice is E-business or out of business. Oracle E-Business Suite is the simple, complete solution designed to get you moving at internet speed.

Favorites

- Oracle
- CNN
- Yahoo
- Amazon

Oracle Links

- Oracle Home
- Applications
- Education
- Consulting
- Partners

The About region on this page can be customized to fit your business needs and communicate your firm's global messages or announcements. To customize this region you just need to edit the jtfloginb.jsp file using an HTML or text editor. In addition, if you deploy Oracle Marketing Encyclopedia (MES) this page will display news feeds out of MES.

Figure 2: eBusiness Login Page

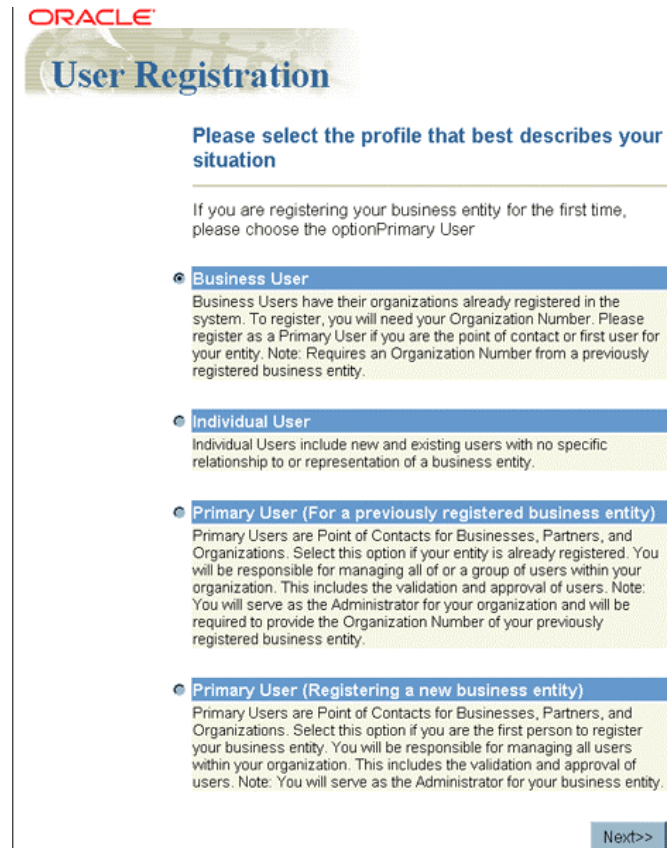
Fields/Links on Login Page

<i>Field/Link</i>	<i>Description</i>
User ID	Customer's user name.
Password	Customer's password

User Type

Your customers use this page to identify their profiles.

eBusiness Login ► Register Here



The screenshot shows the Oracle User Registration page. At the top, the Oracle logo is visible. Below it, the title "User Registration" is displayed. The main heading is "Please select the profile that best describes your situation". A note states: "If you are registering your business entity for the first time, please choose the option Primary User". There are four radio button options, each with a description:

- Business User**: Business Users have their organizations already registered in the system. To register, you will need your Organization Number. Please register as a Primary User if you are the point of contact or first user for your entity. Note: Requires an Organization Number from a previously registered business entity.
- Individual User**: Individual Users include new and existing users with no specific relationship to or representation of a business entity.
- Primary User (For a previously registered business entity)**: Primary Users are Point of Contacts for Businesses, Partners, and Organizations. Select this option if your entity is already registered. You will be responsible for managing all of or a group of users within your organization. This includes the validation and approval of users. Note: You will serve as the Administrator for your organization and will be required to provide the Organization Number of your previously registered business entity.
- Primary User (Registering a new business entity)**: Primary Users are Point of Contacts for Businesses, Partners, and Organizations. Select this option if you are the first person to register your business entity. You will be responsible for managing all users within your organization. This includes the validation and approval of users. Note: You will serve as the Administrator for your business entity.

A "Next>>" button is located at the bottom right of the form.

Figure 3: User Management: Registration page

Business User

eBusiness Login ► Register Here ► Next



The screenshot shows the Oracle User Registration page for Business Users. At the top, the Oracle logo is visible. Below it, the title "User Registration" is displayed. The main heading is "Enter your organization information". The text reads: "I want to register for an existing organization. Here is my organization number:". There is a text input field for the organization number. Below the input field are two buttons: "Clear" and "Next>>".

Figure 4: User Management: User Registration page

Individual User

eBusiness Login ► Register Here ► Next



ORACLE®

User Registration

Enter Your Personal Information

*First Name

*Last Name

*User Name

*Password

*Verify Password

*E-mail

Phone Number -

*Indicates Required field
Password should be at least 6 characters long

Figure 5: User Management: User Registration page

Primary User (Previously registered business entity)

eBusiness Login ► Register Here ► Next



ORACLE®

User Registration

Enter your organization information

I want to register for an existing organization.

Here is my organization number:

Figure 6: User Management: User Registration page

eBusiness Login ► Register Here ► Next ► Next



The form is titled "ORACLE User Registration" and "Enter Your Personal Information". It contains several required fields marked with an asterisk: First Name, Last Name, User Name, Password, Verify Password, E-mail, and Phone Number. The Password field has a note: "Password should be at least 6 characters long". There are "Clear" and "Next>>" buttons at the bottom.

*First Name	
*Last Name	
*User Name	
*Password	
*Verify Password	
*E-mail	
Phone Number	-

*Indicates Required field
Password should be at least 6 characters long

Clear Next>>

Figure 7: User Registration: Personal Information

Primary User (New business entity)

eBusiness Login ► Register Here ► Next



The form is titled "ORACLE User Registration" and "Enter Your Organization Information". It contains several required fields marked with an asterisk: Organization Name, Address Line 1, Address Line 2, Address Line 3, City, State, Zip, Country, Daytime Phone Number, and Fax Number. The Country field is a dropdown menu. There are "Clear" and "Next>>" buttons at the bottom.

*Organization Name	FMT Systems Inc.		
*Address Line 1	Junda Building, Suite 210		
Address Line 2	Frank H. Ogawa Plaza		
Address Line 3			
*City	Oakland		
*State	CA		
*Zip	94612		
*Country	United States		
*Daytime Phone Number	610	628-0374	
*Fax Number	610	836-8987	

*Indicates Required field

Clear Next>>

Figure 8: User Registration: Organization Information

eBusiness Login ► Register Here ► Next ► Next



The screenshot shows the Oracle User Registration page. At the top, the Oracle logo is in red. Below it, the title "User Registration" is in a large, blue, serif font. Underneath the title, the heading "Enter Your Personal Information" is in a smaller, blue, sans-serif font. The form contains several input fields, each preceded by a red asterisk indicating it is required: "First Name", "Last Name", "User Name", "Password", "Verify Password", and "E-mail". The "Password" and "Verify Password" fields are adjacent. Below these is a "Phone Number" field with a hyphen separator. At the bottom of the form, there is a legend: "*Indicates Required field" and "Password should be at least 6 characters long". At the very bottom, there are two buttons: "Clear" and "Next>>".

Figure 9: User Registration: Personal Information


eBusiness Login ► Register Here ► Next ► Next ► Next



The screenshot shows the Oracle User Registration page. At the top, the Oracle logo is in red. Below it, the title "User Registration" is in a large, blue, serif font. Underneath the title, the heading "Select Your Enrollments" is in a smaller, blue, sans-serif font. The form contains two checkboxes, both of which are checked: "Self - Service Support over the Web" and "Business Enrollment for web store". Below the checkboxes, there are two buttons: "Clear" and "Next>>".

Figure 10: User Registration: Select Enrollments

eBusiness Login ► Register Here ► Next ► Next ► Next ► Next



The screenshot shows the Oracle User Registration Confirmation page. At the top, the Oracle logo is on the left, and 'User Registration' is in a blue banner. Below this, a 'Confirmation' icon and text state: 'Thank you for taking the time to register with us. Your information has been received and is currently being reviewed'. A horizontal line separates this from the 'User Information' section, which is a table with two columns. The first column contains 'Confirmation Number: 10252', 'Name: Dorothy Sheets', and 'User Name: dsheets'. The second column contains 'Date: 13-OCT-2002', 'User Type: Primary User (Registering a new business entity)', and 'Organization Number: 8440'. Below this is a note: '*Please note your Organization Number. This will be required by your users for verification purposes upon registration.' This is followed by the 'Enrollments Selection' section, which is a table with two columns: 'Confirmation Number' and 'Enrollment'. It lists two options: '10254 Self - Service Support over the Web' and '10256 Business Enrollment for web store'. A 'Continue' button is at the bottom right.

User Information	
Confirmation Number: 10252	Date: 13-OCT-2002
Name: Dorothy Sheets	User Type: Primary User (Registering a new business entity)
User Name: dsheets	Organization Number: 8440

*Please note your Organization Number. This will be required by your users for verification purposes upon registration.

Enrollments Selection	
Confirmation Number	Enrollment
10254	Self - Service Support over the Web
10256	Business Enrollment for web store

Continue

Figure 11: User Registration: Confirmation

Customer View: Home Page

eBusiness Login Page ► Go

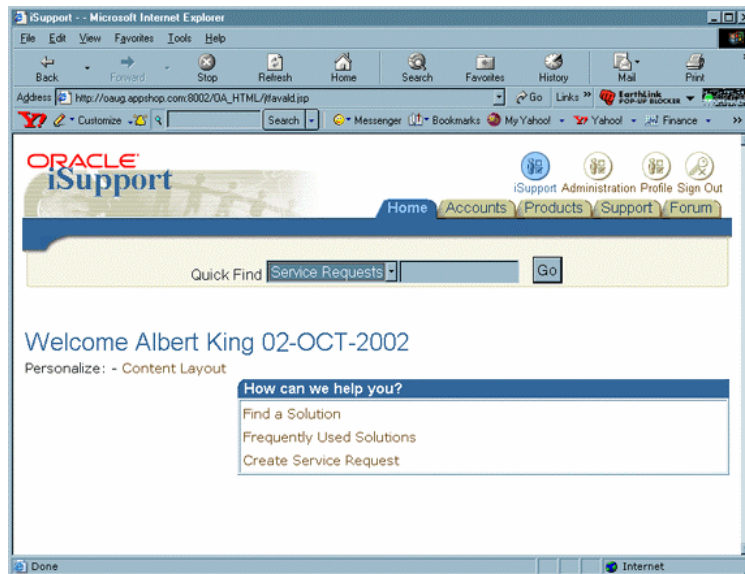


Figure 12: iSupport Customer Home Page

The Home page is your customer's online gateway to your company's support resources. From here your customer can search your company's knowledge base, talk to other users, or create a request for service. Your customer can also customize this page by clicking Content or Layout.

Home Tab Navigation

<i>Field/Link</i>	<i>Description</i>
iSupport	The iSupport icon launches the Customer Home Page.
Administration	The Administration icon launches the user management area. Only your customer's primary user has access to administration.
Profile	The Profile icon launches the personal and company profile area. Your customers can change passwords, review information, and update subscription information.
Sign Out	Clicking the Sign Out icon exits your customer from iSupport.
Quick Find	This feature allows you to find specific information quickly. Simply select the kind of information that you want from the list of values. Enter your selection criteria in the box to the right. Click Go .

<i>Field/Link</i>	<i>Description</i>
Content	When your customer clicks this link, s/he can select the information (content) to appear on his/her iSupport page.
Layout	This link allows your customer to organize the appearance of the page's content.
Find a Solution	This link assists your customer with locating a solution related to his/her problem.
Frequently Used Solutions	This link launches a list of solutions to common problems.
Create Service Request	This link launches a page where your customer can create a request for service.

Customer View: Find a Solution

Home ► Find a Solution

ORACLE iSupport

Home Accounts Products Support Forum

Quick Find Service Requests Go

Basic Search Advanced Search Technical Library

Categories

Home

Appliances

Desktop

Monitor

Printer

Search for Accumulate Go

Common Problems

Problem Description	Number of times used
Toshiba laptop does not recognize floppy disk when installed	2
CD-ROM Drive Door does not close	2
Unable to Play Music CD in DVD-ROM Drive	1
Cannot Copy Pocket Excel Files to Your Desktop Computer	1
Desktop does not boot	1

First | Previous 1 - 5 of 5 Next | Last

Figure 13: Find a Solution: Basic Search

To begin searching for a solution:

- 1 From the iSupport Home page, click **Find a solution**. This launches the Basic Search page.
- 2 Your customer can search for a solution under the **Problem Description** column of the **Common Problems** table.

iSupport — Basic Search

Field/Link	Description
Categories	Can consist of groupings that your company uses for organization of solutions. For products, you can use category names from the Item Master. For non-product categories, you can enter a manual description.
Search for	Your customer can enter keywords for his/her problem and click Go to locate additional solutions.
Problem Description	Provides a list of common problems encountered by other customers.
Number of times used	Indicates the frequency of use by customers other than the customer who logged the problem.

Advanced Search

Find a Solution ► Advanced Search

If your customers want to conduct a search for a specific category, product, or platform, they can use the Advanced Search feature to narrow their search criteria.

ORACLE iSupport

Home Accounts Products Support Forum

Quick Find Service Requests Go

Basic Search Technical Library

Search for a Solution - Advanced

Categories Products Platforms

Add Add Add

Solution Types All

Search Options Accumulate

Relevancy Threshold 1 % and higher

Sort By Score Ascending Descending

Select	Number	Type	Description
<input checked="" type="checkbox"/>	All		

Add Row Del Row

Search For Matching Solutions Go

Figure 14: Find a Solution: Advanced Search

Technical Library

Find a Solution ► Technical Library

ORACLE iSupport

Home Accounts Products Support Forum

Quick Find Service Requests Go

Technical Library Common Problems

iSupport Company News

Customer View: Frequently Used Solutions

Home Tab ► Frequently Used Solutions

ORACLE iSupport

Home Accounts Products Support Forum

Quick Find

Common Problems Technical Library

View Solutions Used

Problem Description	Number of times used	Creation Date
Toshiba laptop does not recognize floppy disk.....	2	08-MAY-2000
CD-ROM Drive Door does not close	2	05-SEP-2000
Unable to Play Music CD in DVD-ROM Drive	1	12-SEP-2000
Cannot Copy Pocket Excel Files to Your Desktop.....	1	08-MAY-2000
Desktop does not boot	1	09-FEB-2001

First | Previous 1 - 5 of 5 Next | Last

Other Recommended Solutions

Description
Hard Disk is a making noise and system is slow
How to configure your Desktop
Characters Appear as Square Boxes in Printed Document
Just replaced ink jet cartridge on printer, now quality of print poor.
ODBC does not recognize SYSTEM.MDA file if path is longer than 29 chars

First | Previous 1 - 5 of 7 Next | Last

Figure 15: Frequently Used Solutions: Common Problems

Customer View: Create a Service Request

Home Tab ► Create Service Request

Figure 16: Create Service Requests

Table title

Field/Link	Description
Service Request Profile	Your customer can create different profiles for service. When s/he selects one of those profiles, information attached to that profile appears in the fields.
Contact Information	
Account Number	Your customer's account number with your company.
Primary Contact	Your first contact with the customer should be with the individual identified here.
Contact by	Your customer can select how s/he wants your customer support team to contact him/her.

*Account Number
 *Primary Contact
 *Contact By

Service Request Details

*Request Type
☒ Select from products I own

*Product
 Version

*Urgency
 Problem Code

Project Number
 Help Desk Number

*Request Summary

Attachments	Remove	Attachment	Description
	<input type="button" value="X"/>	<input type="text"/>	<input type="text"/>
	<input type="button" value="X"/>	<input type="text"/>	<input type="text"/>
	<input type="button" value="X"/>	<input type="text"/>	<input type="text"/>

*Indicates Required Field

Figure 17: Create Service Requests: Service Request Details

Field/Link	Description
Service Request Details	
Request Type	Your customer can indicate the nature of the request for service.
Product	Your company's product for which your customer is contacting support.
Version	If a version number is appropriate, your customer may select it here.
Urgency	Your customer indicates the seriousness of his/her problem.
Problem Code	Your customer can select a general category for the difficulty s/he is experiencing with your company's product.
Project Number	If a project number is associated with the request for service, your customer may enter it here.
Help Desk Number	If a help desk number is associated with the request for service, your customer may enter it here.
Request Summary	Your customer must enter a brief description of the difficulties with your company's product.
Attachments	Your customer may include documents that may assist your customer support team with identifying the problem and its solution.
Cancel	Clicking this button cancels the request for service.
Continue	Clicking this button launches the Template detail section of your customer's request for service.

ORACLE iSupport

Home Accounts Products Support Forum

Quick Find Service Requests Go

Create Service Requests

Template Troubleshooting

Template Detail

* Did you follow instructions in Manual Yes

* Is your product still under warranty? Yes

* Enter a brief description of the problem I've attempted all the known fixes. The CD drive door won't close. The system will not POST.

* Indicates Required Field

Cancel Search Knowledge Base Back Continue

Figure 18: Create Service Requests: Template Details

Field/Link	Description
Template	Your company can set up templates for your customers to use when submitting a request for service. Template examples might be troubleshooting, information request, or shipping damage.
Template Details	
Did you follow instructions in Manual	Select Yes or No .
Is your product still under warranty?	Select Yes or No .
Enter brief description of the problem	Your customer must enter a more complete explanation of the difficulties encountered with your company's product.
Cancel	If your customer clicks this button, the request for service is ended.
Search Knowledge Base	Clicking this button launches your company's knowledge base. Your customer can search for a solution to his/her problem.
Back	Clicking this button returns your customer to the previous Web page.
Continue	Clicking this button takes your customer to the next Web page.

ORACLE iSupport

Home Accounts Products Support Forum

Quick Find Service Requests Go

Verify Service Request

Service Request Profile AKing-01

Contact Information

Account Number 1608
 Primary Contact Albert King
 Contact By E-mail - aking@bw.com

Service Request Details

Request Type Customer Call
 Product AS18947 - Sentinel Deluxe Desktop
 Urgency Inoperable - Systems are inoperable
 Version
 Problem Code Hardware Problem - Hardware Problem Encountered
 Help Desk Number

Project Number

Request Summary The CD drive door stays open. Tried known fixes. The door still won't close.

Attachment	Description
None	

Figure 19: Verify Service Request

Service Request Details

Request Type Customer Call
 Product AS18947 - Sentinel Deluxe Desktop
 Urgency Inoperable - Systems are inoperable
 Version
 Problem Code Hardware Problem - Hardware Problem Encountered
 Help Desk Number

Project Number

Request Summary The CD drive door stays open. Tried known fixes. The door still won't close.

Attachment	Description
None	

Modify Section Above

Template Troubleshooting

Template Detail

Did you follow instructions in Manual Yes
 Is your product still under warranty? Yes
 Enter a brief description of the problem I've attempted all the known fixes. The CD drive door won't close. The system will not POST.

Modify Section Above

Cancel Back Submit Service Request

Figure 20: Verify Service Request: Template Detail

Email this to me

Service Request Number 11944

Contact Information

Primary Contact Albert King
 Contact By Email - aking@bw.com
 Account Number 1608
 Created By Albert King

Service Request Details

Status Open - Open
 Request Type Customer Call
 Project Number
 Urgency Inoperable
 Product AS18947 - Sentinel Deluxe Desktop
 Problem Code HDWR - Hardware Problem Encountered
 Date Created 10-OCT-2002
 Help Desk Number
 Current Owner Daugherty, Mr. John
 Version

Request Summary The CD drive door stays open. Tried known fixes. The door still won't close.

Service Request Log

** Did you follow instructions in Manual
 Yes
 ** Is your product still under warranty?
 Yes
 ** Enter a brief description of the problem
 I've attempted all the known fixes. The CD drive door won't close. The system will not POST.

Attachments	Attachment	Description
None		

Figure 21: Confirm Service Request

Customer Support View

Overview

Once your customer submits a service request in iSupport, that information is transmitted by Oracle to the customer support team that is responsible for that customer account. The request for service information appears in the Universal Work Queue. This feature displays the tasks, service requests, and other work-related items for you and your team.

The Universal Work Queue becomes your hub for accessing your work and monitoring your team's work. From the UWQ, you can launch the task manager, service requests, or escalations.

Universal Work Queue

The UWQ is your hub for accessing work items to assist your company's customers.

Login ► Personal Home Page ► Customer Support ► Universal Work Queue

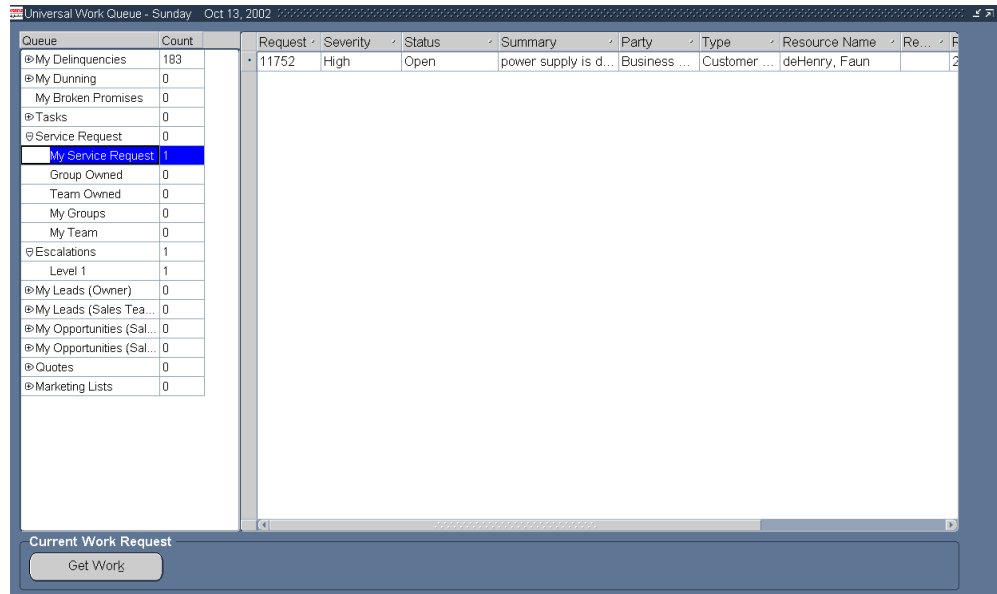


Figure 22: Universal Work Queue window

To launch the Universal Work Queue:

- 1 Select the Customer Support responsibility from your responsibilities list on your Personal Home Page.
- 2 From the Customer Support Navigator, select **Universal Work Queue**. This launches the Universal Work Queue window.
- 3 Select the WorkList node (Tasks, Service Request, Escalations) that you want.
- 4 Click **Get Work**. This action launches and displays the details of the work item.
- 5 When your work is complete, click the save icon.
- 6 To request the next work item from the WorkList node, click **Get Work** in the Universal Work Queue window.

Universal Work Queue window Fields and Links

Field/Link	Description
Queue	List of nodes in your work queue.
Count	Number of items in each node.

Service Request Node

<i>Field/Link</i>	<i>Description</i>
Request	The service request number assigned by Oracle CRM.
Severity	The level of seriousness that your company assigned to your customer's request for service.
Status	Indicates the progress of the service request.
Summary	Information from the request summary that your customer entered during the creation of the request for service.
Party	Name of the party.
Type	Kind of contact requested by your customer.
Resource Name	Company employee assigned to resolve the request for service.
Resolution By	Employee who resolved the customer's problem.
Respond By	Date by which a response to your customer is required.
Creation Date	Date that the request for service was created.
Contact Name	Person to contact with your customer's organization.

Service Request

Login ► Personal Home Page ► Customer Support ► Universal Work Queue ► Tasks ► Service Request

The screenshot displays the 'Service Request (11752) - America/Los_Angeles' window. It features a top navigation bar with buttons for 'Customer...', 'Assign Group', 'Assign Owner', and 'Profile...'. Below this, the window is divided into several sections:

- Contact Information:** Includes fields for Contact Type (Relation), Email (dlyon_bw_us@ya), Number (3255), Last Name (Lyon), First Name (Diane), Relationship (Employee Of), and Phone.
- Customer Information:** Includes Customer Type (Organization), Email (operations@busir), Number (2813), Name (Business World), Account (1608), and Phone.
- Product Information:** Includes Category, Product (AS54888), Desc (Sentinel Stand), Serial, Contract (15649), and Reference (42559).
- Request Details:** Includes Installed Base (checked), Number (11752), Created (29-SEP-2002 14:04), Type (Customer Call), Status (Open), Severity (High), Group, and Owner (deHenry, Faun).
- Product Coverage:** A tabbed interface showing details for Product AS54888 (Sentinel Standard Desktop). It includes fields for Component, Subcomponent, Reference Num (42559), Platform, Operating System, Database, Tier, Sales PO Num, Type (FG), Platform Version, Operating System Version, Database Version, Tier Version, and Order Num (50790).
- Contracts:** A table listing active contracts. The first contract is selected, showing Contract 15649, Service WR23763, Description Extended Notebook PC Service Program, Warranty, Start Date 14-AUG-2001, and End Date 13-AUG-2006.
- Bottom Bar:** Contains buttons for 'Call Information', 'Call Wrap Up', 'End Interaction', and 'Agent On Break'.

Figure 23: Service Request window

To work on a request for service:

- 1 Click the Service Requests WorkList Node to expand the service requests list.
- 2 Click **Get Work** to begin your work item.

Task Management

The Task Management window enables you to complete tasks for your company's customers. From this window, you can also assign tasks to other resources and notify them of the assignments.

Login ► Personal Home Page ► Customer Support ► Universal Work Queue ► Tasks ► My Owned (My Assigned/Group Owned/Team Owned)

The screenshot shows the 'Tasks' window with a table of tasks and a detailed view of a selected task.

Num	Escalation	Name	Type	Status	Owner	Priority	Source Doc Type	Source Doc Num	Closed
14185		Diane Streu	Problem Resol...	In Planning	Streu, Diane	Fast Track	Escalations	14162	X

Task Details:

- Number: 14185
- Name: Diane Streu
- Type: Problem Resolution
- Status: In Planning
- Owner Type: Employee Resou
- Owner: Streu, Diane
- Priority: Fast Track
- Source Document: Escalations
- Source Value: 14162
- Assigned By: DEHENRY
- Escalation Level: []
- Escalation Owner: []

Dates:

	Planned	Scheduled	Actual
Start			
End			

Effort:

	Planned	Actual	Duration	% Complete
Planned				
Actual				
Duration				

Customer Details:

Name	Business World	Phone	
Number	2813	Account	1608
Address			

Buttons: Notes, Create Task from Template, Launch Workflow, More...

Figure 24: Task Management window

To manage a task:

- 3 Click the Tasks WorkList Node to expand the tasks list.
- 4 Click **Get Work** to begin your work item.

Task Management window Fields and Links

Field/Link	Description
Num	Number associated with the task.
Escalation	
Name	Resource assigned to the task.

<i>Field/Link</i>	<i>Description</i>
Type	Indicates the kind of task.
Status	Displays the progress of the task
Owner	The customer service representative who owns this task
Priority	The importance that your company has assigned to this task.
Source Doc Type	Indicates the originating document for the task.
Source Doc Number	Displays the originating document number.
Closed	
Planned Start Date	Date by which the resource is intended to begin the task.
Planned End Date	Date by which the resource is intended to finish the task.
Scheduled Start Date	Date by which the resource is assigned to begin the task.
Scheduled End Date	Date by which the resource is assigned to finish the task.
Actual Start Date	Date by which the resource truly begins the task.
Actual End Date	Date by which the resource truly finishes the task.
Number	Escalation number
Status	Progress of task
Source Document	Indicates the originating document
Description	Explanation regarding assigned resources efforts to complete the task.
Name	Identifies the assigned resource for the task
Owner Type	Indicates the classification of the task owner, i.e., employee resource, contract resource, etc.
Source Value	Displays the originating document number.
Owner	Identifies the owner of the task.
Parent Task	Indicates the parent task, if available.
Type	Identifies the kind of task
Priority	Displays the importance that your company has assigned this task.
Assigned By	Identifies the employee resource that assigned this task.

<i>Field/Link</i>	<i>Description</i>
Escalation Level	Indicates the level your company assigned to the escalation associated with this task.
Escalation Owner	Identifies the escalation owner, if available.
Dates	Enter planned, scheduled, and actual start and end dates for this task.
Time Zone	Enter the time zone, if appropriate.
Effort	Enter the planned and actual number of hours, days, months, etc. necessary for completion of this task.
Customer Details	Includes customer's name, party number, address, account number, and phone number.
Notes	Click this button to launch the Notes feature.
Create Task from Template	Click this button to create tasks identified in a template.
Launch Workflow	Click this button to start workflow notifications.
More . .	Click this button to launch the Task Details window.

Escalations

Login ► Personal Home Page ► Customer Support ► Universal Work Queue ► Tasks ► Escalations

Figure 25: Escalations window

To work on an escalation:

- 1 Click the Escalations WorkList Node to expand the escalations list.
- 2 Click **Get Work** to begin your work item.

Escalations window Fields and Links

<i>Field/Link</i>	<i>Description</i>
Customer Information	Customer name, account number, and customer location.
Escalation Information	The escalation number, progress of the escalation, and the reason that the escalation occurred.
Escalation Owner Information	The level of the escalation, the escalation territory, and the owner of the escalation.
Escalation Summary	Brief description about the escalation

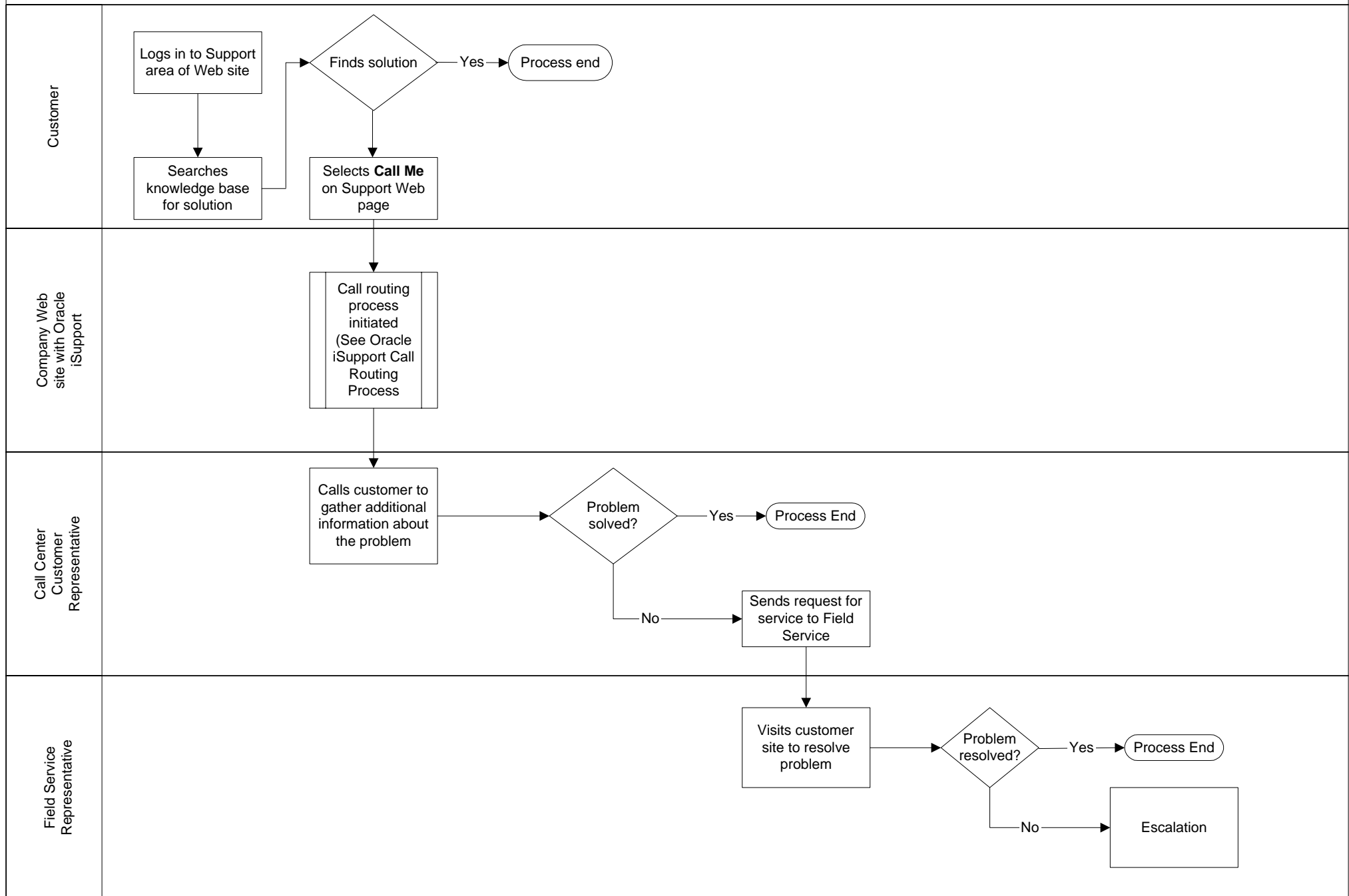
<i>Field/Link</i>	<i>Description</i>
Reference Documents	Provides information about the service request or task number from which the escalation occurred.
Contacts	Lists all the contacts related to the escalation.
Audit	Displays all changes you make to the escalation.
Notes	Launches the notes feature.
Task	Launches the Task Management window with associated tasks for the escalation.
Save	Saves your changes.
Cancel	Closes the escalation window.

Appendices

Appendix A

The following page contains a larger illustration of the sample customer support process.

Customer Call to Resolution



Appendix B

The following page contains a larger illustration of the Oracle Call Routing process.

Oracle iSupport Call Routing Process

