CLOUD READINESS

Oracle Service Cloud Agent Browser UI

March 12, 2020 Update

What's New

ORACLE

TABLE OF CONTENTS

REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates appear in the following table:

Date	Feature	Notes
13 MAR 2020		Created initial document.

OVERVIEW

This guide outlines the information you need to know about new or improved functionality in Oracle Service Cloud Agent Browser UI November 2019 and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable to begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

For a listing of hardware and software requirements for Oracle products, log in to our support site and access Answer ID 31.

GIVE US FEEDBACK

We welcome your comments and suggestions to improve the content. Please send us your feedback

FEATURE SUMMARY

Column Definitions:

Features Delivered Enabled

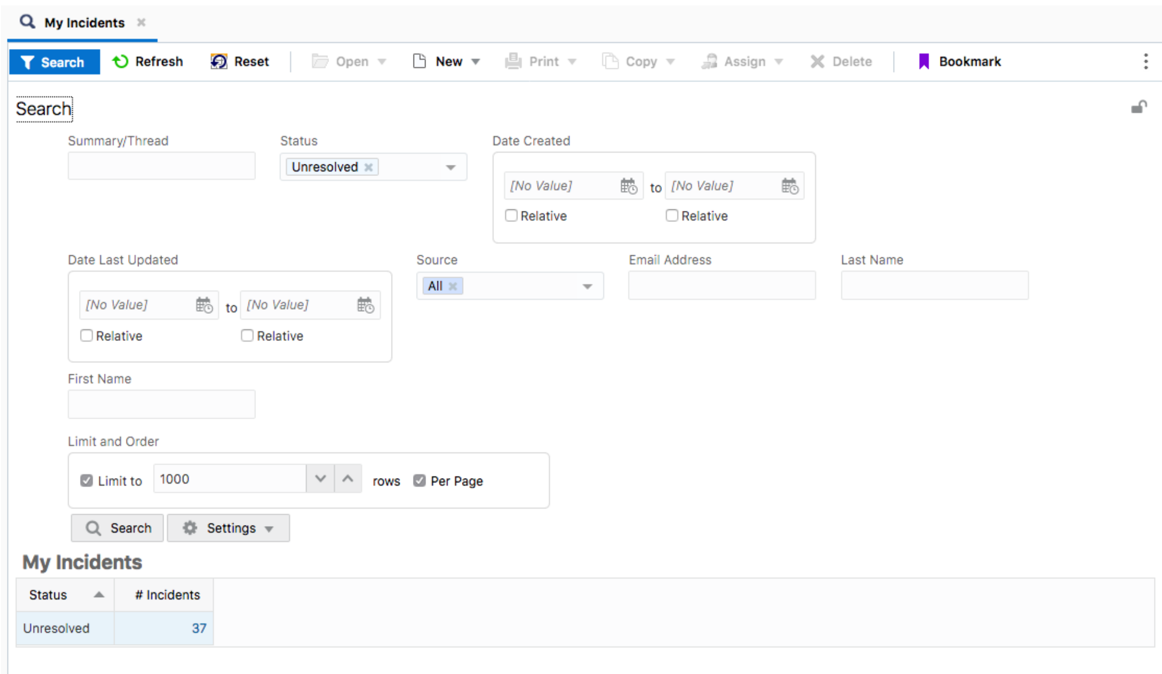
Report = New or modified, Oracle-delivered, ready to run reports.
UI or Process-Based: Small Scale = These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.
UI or Process-Based: Larger Scale* = These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.
Customer Action Required = You MUST take action before these features can be used. These features are delivered disabled and you choose if and when to enable them. For example, a) new or expanded BI subject areas need to first be incorporated into reports, b) Integration is required to utilize new web services, or c) features must be assigned to user roles before they can be accessed.

	Ready for Use by End Users (Features Delivered Enabled) Reports plus Small Scale UI or Process-Based new features will have minimal user impact after an update. Therefore, customer acceptance testing should focus on the Larger Scale UI or Process-Based* new features.			Action is Needed BEFORE Use by End Users (Features Delivered Disabled) Not disruptive as action is required to make these features ready to use. As you selectively choose to leverage, you set your test and roll out timing.
Feature	**Report**	**UI or Process-Based: Small Scale**	**UI or Process-Based: Larger Scale***	**Customer Action Required**
Analytics				
Search Area Update		✓		
Knowledge				
Propose Answer from Incident				✓

ANALYTICS

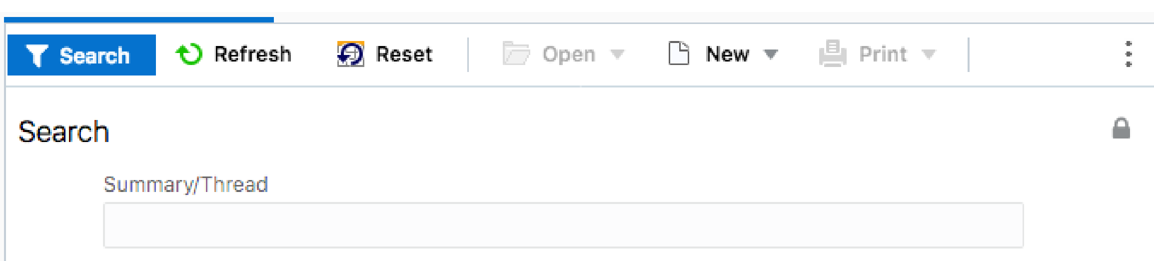
SEARCH AREA UPDATE

The Filter access area has been updated to a Search button in the Toolbar in Agent Browser UI for Reports and Dashboards to allow users to optimize use of their screen. Previously, users have accessed filters from the Filter area in the top of the report but that required some screen area that took away from a user's report surface. The Search button in the toolbar can be used to show or hide the report filters. When the search is executed, the filter area will automatically collapse to optimize the report surface.



Search Area Update

If the user wants to keep the filter area open to work with different filter values, the filter area can be locked open using the lock icon in the upper right hand corner.



Search Area Lock Icon

Docked filters will remain visible because they are specified in the report definition to be displayed in the report's view.

STEPS TO ENABLE

No steps are required to enable this feature.

TIPS AND CONSIDERATIONS

- Docked filters can be configured for reports when you want filters to continuously display.
- During report design, you can choose to show the filters at runtime in the Report Designer by selecting the "Make this filter selectable at run time."

KEY RESOURCES

- See documentation for detail on report configuration.

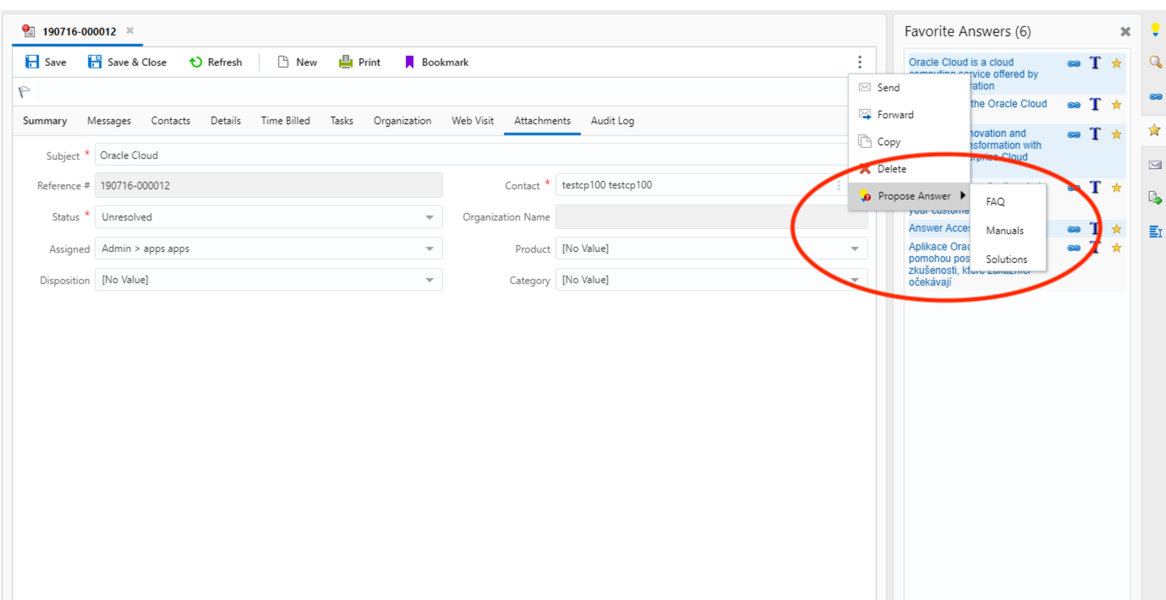
ROLE INFORMATION

- Report Users

KNOWLEDGE

PROPOSE ANSWER FROM INCIDENT

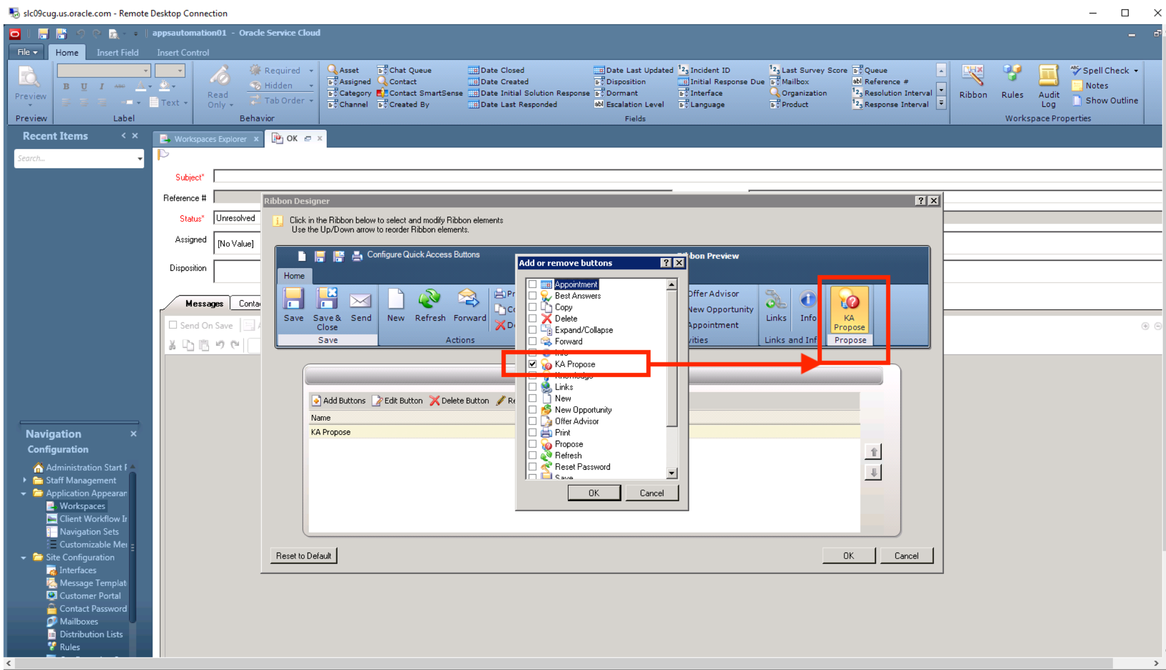
The feature allows an agent to propose an incident as an answer from the incident workspace. Sometime a customer’s question is common enough that an agent might believe that other customers should also have access to the answer. If an agent believes that the information belongs in the knowledge base(Oracle Knowledge), they can propose the incident as a potential answer.



Propose Answer on Incident Workspace

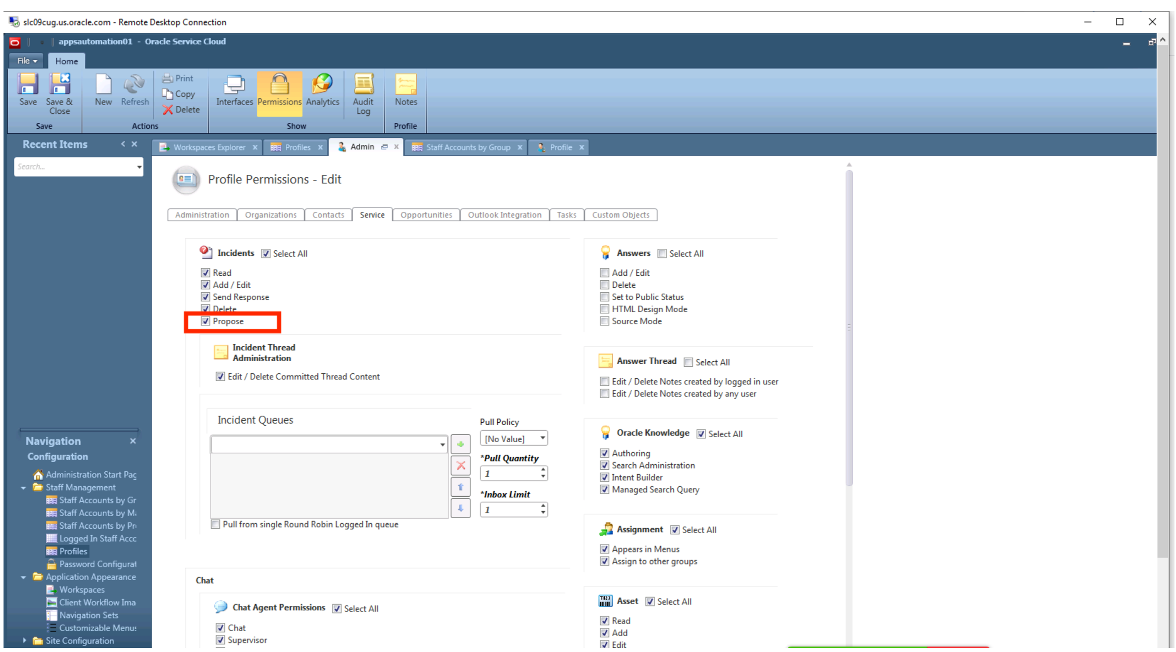
STEPS TO ENABLE

1. Administrator needs to add the Knowledge Advanced Propose button to the incident workspace.



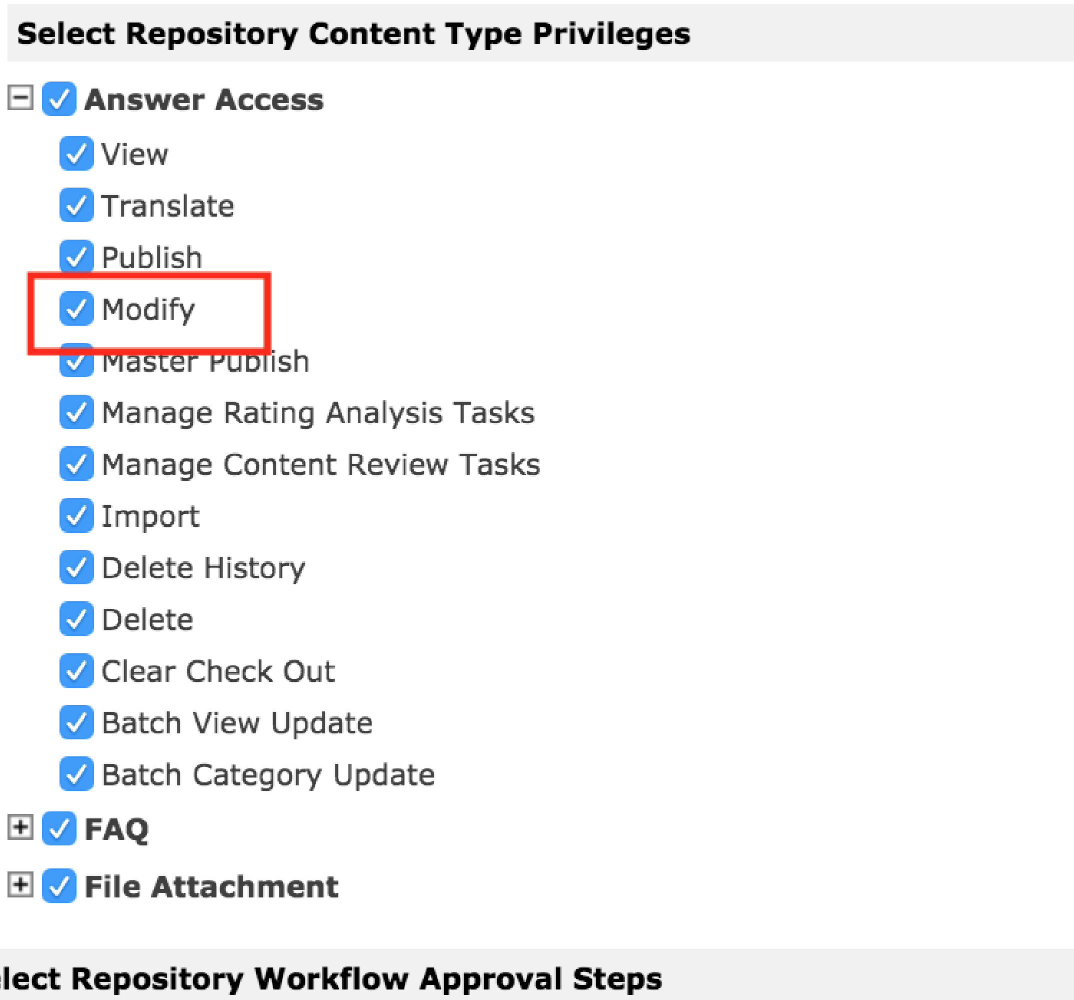
Add Knowledge Advanced(KA) Propose Button to the Incident Workspace

2. Administrator must provide Propose permission in the user profile of agents for them to see the propose option in the incident window.



Enable Propose Permission in Profile Settings

3. Administrator must provide to the agent 'modify' permission in Oracle Knowledge Authoring console. The permission is set for the content type of the article that he/she can create.



Set 'Modify' Permission forAgent in Oracle Knowledge Authoring Console

TIPS AND CONSIDERATIONS

1. The propose option is available to only agents when they use the Browser User Interface. It is not available to agent
2. When agents propose an article, the application creates an article from the incident, but it remains unpublished until it is approved by a knowledge manager.
3. Agents need to select the content type for the article that they are proposing, and they must select a content type that has appropriate fields so that the incident content can be properly saved as an article. If an agent selects a content type that does not have the appropriate fields, the process will fail with an error message.
4. The application creates the new article by mapping the incident's fields to the article's fields as follows:
   - The incident's subject maps to the text field that is the master identifier for the content type. This is usually the title.
   - The first customer entry maps to the first rich text area.
   - Subsequent message threads map to the second rich text area.

ROLE INFORMATION

- CRM Administrator
- Knowledge Administrator

Oracle is committed to developing practices and products that help protect the environment

Integrated Cloud Applications & Platform Services