

**Oracle® Fusion Middleware**  
User's Guide for Oracle Complaints  
Management Process Accelerator  
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# Oracle Complaints Management Process Accelerator

*Oracle Fusion Middleware User's Guide for Oracle Complaints Management Process Accelerator* describes how to administer and use this process accelerator.

## Audience

This document is intended for:

- Field office agents who use Oracle Complaints Management to create complaints
- Complaints handlers and complaints investigators who use Oracle Complaints Management to process complaints
- Administrators who maintain Oracle Complaints Management seeded data, business rules, and reports

## Related Documents

For more information, see the following Oracle resources:

Oracle Complaints Management Process Accelerator

- *Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators*

Oracle Business Process Management Suite

- *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Modeling and Implementation Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Business Process Composer User's Guide for Oracle Business Process Management*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA Suite and Oracle Business Process Management Suite*

Oracle Business Rules

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*

Oracle WebCenter Content

- Oracle WebCenter Content System Administrator's Guide for Content Server

Oracle Fusion Middleware

- Oracle Fusion Middleware Administrator's Guide

## Conventions

The following text conventions are used in this document:

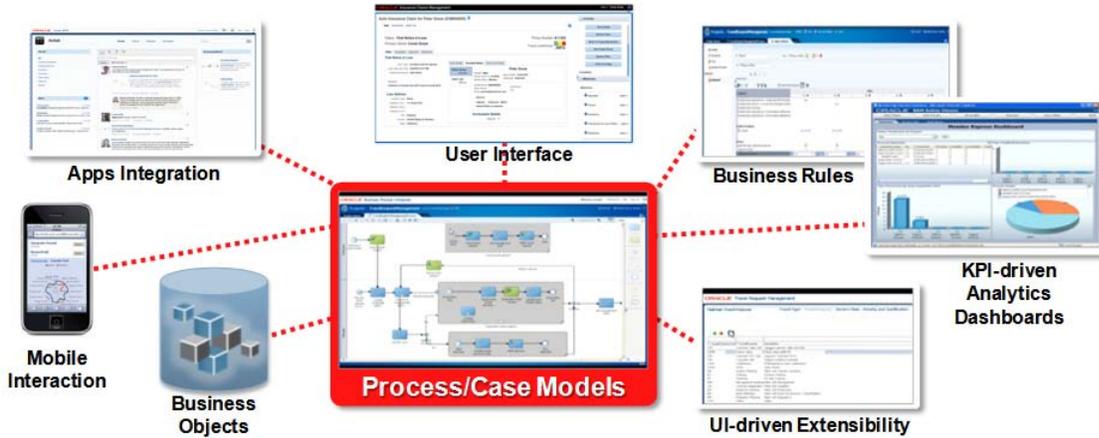
- **boldface** - Boldface type indicates graphical user interface elements or terms defined in text.
- *italic* - Italic type indicates book titles, emphasis, or placeholder variables for which Overview of Oracle Process Accelerators

## Oracle Complaints Management Process Accelerator

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Oracle Process Accelerators (PA) are prebuilt business process solutions developed with Oracle Business Process Management (BPM) Suite or other Oracle SOA Suite components. Oracle Process Accelerators are developed to support and automate critical industry and horizontal business processes. Oracle PAs utilize best practices to accelerate time-to-value and increase quality. When needed, PAs include ready-to-use integration scenarios that extend Oracle applications. Oracle PAs can be deployed as-is or extended to meet your requirements. The Oracle PA framework diagram illustrates the basic components of a process accelerator.

### Oracle PA Framework



## Getting Started with Oracle Complaints Management

This section is for new Oracle Complaints Management (CMPM) users who want a brief introduction.

Upon completion of this section, you will be able to:

- Describe the basic Oracle Complaints Management process lifecycle.
- Describe the Oracle Complaints Management pages and related Oracle Business Process Management Workspace pages.
- Start Oracle Complaints Management.

## Overview of Oracle Complaints Management

Oracle Complaints Management (CMPM) Process Accelerator is a process solution, based on the adaptive case management framework, which enables organizations to create and process customer complaints. Oracle CMPM provides dashboards to view process analytics and complaint summary reports. Administrators can modify the business rules and seeded data.

Oracle CMPM is a role-based solution; your role determines the activities you can perform. Oracle CMPM delivers the following roles:

- The front office agent files a complaint from a customer and assigns a complaints handler to the case.
- The complaints handler is the primary owner responsible for reviewing and resolving the complaint.
- The complaints investigator is responsible for investigating the complaint and submitting his report to the complaints handler.

Because Oracle CMPM is based on the adaptive case management framework, there is no single BPM process model to dictate complaint processing. Complaints are processed based on the activities performed by each role and the defined business rules. Activities are performed on an ad hoc basis depending on the circumstances of a complaint. Some activities are repeatable due to the adaptive case management framework; while others are performed once. The Complaint Status table provides the details for each status, the case activity, the role, when the activity changes to the next phase, and if the activity is repeatable.

**Complaint Status**

Complaint Status	Case Activity	Role	Activity Changes Phase	Repeatable
N/A	Initialize New Complaint	Application	Filed	No
Filed	Update Complaint	Front Office Agent		Yes
Filed	Assign Complaint Handler	Front Office Agent	Review	No
Review	Update Complaint	Complaints Handler		Yes
Review	Perform Initial Assessment	Complaints Handler		Yes
Review	Initiate Investigation	Complaints Handler	Investigation	No
Review	Initiate Resolution	Complaints Handler	Resolution	No
Investigation	Investigate Complaint	Complaints Investigator		Yes
Investigation	Submit Investigation Report	Complaints Investigator	Review	No
Resolution	Record Customer Acceptance	Complaints Handler		Yes
Resolution	Refer to Arbitration	Complaints Handler	Arbitration	No
Arbitration	Record Arbitration Outcome	Complaints Handler		Yes
Review or Investigation or Resolution or Arbitration	Create Response	Complaints Handler		Yes
Review or Investigation or Resolution or Arbitration	Communicate Response	Complaints Handler		Yes
ANY except Closed	Maintain Involved Parties	All		Yes
Any	Close Complaint	All	Closed	No
Any	Create Task	All		Yes
Any	Send Email	All		Yes

**Understanding the Oracle Complaints Management Pages**

You navigate Oracle Complaints Management (CMPM) through the Oracle Business Process Management Workspace. Your role within Oracle CMPM determines the tasks you can perform, and the pages you can access. Some of these pages are Oracle Business Process Management Workspace, others are Oracle CMPM. Understanding the pages associated to a task or role makes you more effective in your use of Oracle CMPM.

This topic addresses the various Oracle Business Process Management Workspace and Oracle CMPM pages you use.

**Understanding the Oracle Complaints Management Pages**

1. The Oracle Business Process Workspace **Tasks** page appears after you log into Oracle Business Process Management Workspace. This is an Oracle Business Process Management Workspace page.

From here you can:

- Take action on a complaint by executing the tasks assigned to you in **Views, My Tasks**
- Access Oracle CMPM from the **Links** link

2. Use the **Manage Complaints** link to access Oracle Complaints Management. This is an

Oracle Business Process Management Workspace page.

3. Use the **File Complaint** page to file a complaint on behalf of a customer. This is an Oracle Complaints Management page.
4. Use the **Case** page to perform activities on a complaint. This is an Oracle Business Process Management Workspace page.
5. Use the **Maintain Lookup Types** page to modify the lookup type codes made available when filing a complaint. This is an Oracle Complaints Management page.
6. Use the **Maintain Country and State Codes** page to modify the country and state codes made available when filing a complaint. This is an Oracle Complaints Management page.
7. Use the **Maintain Products** page to modify the products and product information made available when filing a complaint. This is an Oracle Complaints Management page.
8. Use the **Maintain Templates** page to modify the templates used to create a customer response and an investigation report. This is an Oracle Complaints Management page.
9. You have completed the **Understanding the Oracle Complaints Management Pages** topic.

## Starting Oracle Complaints Management

You need a valid Oracle Business Process Management Workspace URL, user ID, and password to access Oracle Complaints Management (CMPM). Contact your system administrator for the URL and your login credentials.

In this topic, you will log into Oracle Business Process Management Workspace and access Oracle CMPM.

### ***Procedure: Starting Oracle Complaints Management***

1. To begin, enter **http://server name:port/bpm/workspace** in your web browser.

Replace server name and port with the server name and port number you received from your administrator. The supported web browsers are: Microsoft Internet Explorer 8.x, Chrome 11.x, or Mozilla Firefox 4.x.

The Oracle Business Process Workspace **Sign In** page opens.

2. Enter your username and password in the respective fields, then click **Login**.
3. You are now logged into Oracle Business Process Management Workspace.
4. Navigate to the **Manage Complaints** link.
5. Use the **Manage Complaints** link to access Oracle Complaints Management.
6. You have completed the **Starting Oracle Complaints Management** topic.

## Using Oracle Complaints Management

This section is for front office agents who initiate a complaint, complaints handlers who process a complaint, and complaints investigators who investigate a complaint.

Upon completion of this section, you will be able to:

- File a complaint.
- Open a complaint.
- Update a complaint.
- Maintain involved parties.
- Assign a complaints handler.
- Perform an assessment.
- Initiate an investigation.
- Investigate a complaint.
- Submit an investigation report.
- Initiate a resolution.
- Create a response.
- Communicate a response.
- Record customer acceptance.
- Refer to arbitration.
- Record arbitration outcome.
- Initiate customer loyalty follow up.
- Close a complaint.

### Filing a Complaint

Imagine a customer calls regarding a billing issue. You, as a front office agent, can use Oracle Complaints Management to file a complaint on behalf of the customer. A customer can also file a complaint. Complaints can be submitted in the following ways:

- Browser graphical user interface (GUI): Submission from within the BPM environment.
- Public GUI: Public submission outside of the BPM environment.
- Paper-based: Submission by filling out a paper complaint and scanning it.

In this topic, you will file a customer complaint using all three methods.

#### ***Procedure: Filing a Complaint***

1. Begin by navigating to the **File Complaint** page.  
Click the [Links](#) link.
2. Click the [Manage Complaints](#) link.
3. Click the [File Complaint](#) link.

- Use the **File Complaint** page to file a complaint on behalf of a customer.

ORACLE Complaints Management

Complaints Management  
Manage Complaints  
File Complaint

File Complaint

Customer Information

First Name  
Last Name  
Cell Phone  
Email  
Address

Complaint Information

Summary  
Category  
Type  
Detail  
Narrative  
Customer Expectation

Additional Information

Case Information

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- Complete the complaint form as necessary. In this example, the complaint form has been completed for you.

ORACLE Complaints Management

Complaints Management  
Manage Complaints  
File Complaint

File Complaint

Customer Information

First Name: **Eli**  
Last Name: **Wong**  
Cell Phone  
Email: **ewong@example.com**  
Address: **401 Island Parkway Redwood Shores California United States of America 94065**

Complaint Information

Summary: **Billing Dispute**  
Category: **Billing** Type: **Unjustified Charge** Detail: **Finance Charge**  
Narrative: **Customer claims his automatic payment was made on the day the payment was due so he should not be charged the finance charge.**  
Customer Expectation: **Reverse the finance charges.**

Additional Information

Case Information

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- Scroll to see the remaining fields.

Click the **Vertical** scrollbar.

- Depending on the category, type, and detail selected, additional fields can appear in the Additional Information section.

8. Click the **Submit** button.

9. Confirm the complaint is registered.

Click the **OK** button.

10. After you submit a complaint, you can update the complaint or assign it to a complaints handler.

Next, submit a complaint from the public GUI.

11. If you are a customer, begin using the public GUI by entering **http://server name:port/ComplaintsPublicUI/faces/reportIncident.jspx** in your web browser.

Replace server name and port with the server name and port number you received from your administrator.

12. Use the **File Complaint** page to file a complaint.

The screenshot shows the Oracle Complaints Management web application interface. The title bar reads "ORACLE Complaints Management". The main heading is "Complaints Management" with a sub-heading "File Complaint". There are two buttons in the top right: "View Complaint Status" and "File Complaint".

The form is divided into three sections:

- Tell us about your issue:** Includes a dropdown menu for "Which category best describes your issue" and a large text area for "Provide description and any other details you think we need to know".
- Your Contact Information:** Includes fields for First Name, Middle Name, Last Name, Address Line 1, 2, and 3, City, Country (dropdown), State (dropdown), Zip, Email, and Phone. Below these fields is a question "How would you like to be contacted for your issue?" with radio buttons for "Email" and "Phone".
- Reference Information:** Includes a dropdown for "Product Type" and a text field for "Asset Number".

At the bottom of the window, there is a copyright notice: "Copyright © 2014, Oracle and/or its affiliates. All rights reserved."

13. You complete the **File Complaint** page as necessary. In this example, the complaint has been completed for you.

The screenshot shows the Oracle Complaints Management interface. At the top, there's a header with the Oracle logo and 'Complaints Management'. Below that, the page title is 'Complaints Management' and the sub-section is 'File Complaint'. There are two buttons: 'View Complaint Status' and 'File Complaint'. The form is divided into three sections: 'Tell us about your issue', 'Your Contact Information', and 'Reference Information'. The 'Tell us about your issue' section has a dropdown for 'Customer Service' and a text area with the text 'Customer service rep was very rude.' The 'Your Contact Information' section has fields for First Name (Manny), Middle Name, Last Name (Salas), Address Line 1 (444 Market St), Address Line 2, Address Line 3, City (San Francisco), State (California), Country (United States of America), Zip (94111), Email (msalas@example.com), and Phone (415-555-0101). There's also a radio button for 'Email' and a radio button for 'Phone'. The 'Reference Information' section has a dropdown for 'Product Type' (Consumer Credit) and a text field for 'Asset Number'. At the bottom, there's a copyright notice: 'Copyright © 2014, Oracle and/or its affiliates. All rights reserved.'

14. Use the **File Complaint** button to save and submit the complaint.

Click the **File Complaint** button.

15. Confirm the complaint is registered.

Click the **OK** button.

16. This is an example of a paper complaint.

- You complete the form and scan it to the location provided by your administrator.
- The scanned form is imported into Oracle CPM as a complaint.
- The front office agent updates the complaint or assigns it to a complaints handler.
- The complaint then moves through the complaints process lifecycle.

**Consumer Complaint Form**

**CUSTOMER INFORMATION**

First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

Address Line 1: \_\_\_\_\_

Address Line 2: \_\_\_\_\_

Address Line 3: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Country: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Email: \_\_\_\_\_

What is the best way to contact you? Email  SMS

**COMPLAINT DETAILS**

Describe your complaint in detail : \_\_\_\_\_

What action can we take to resolve this complaint to your satisfaction? : \_\_\_\_\_

Product Type: \_\_\_\_\_ Asset Number: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

17. You have completed the **Filing a Complaint** topic.

### Opening a Complaint

After filing a complaint, you can open it from the **Case** page.

In this topic, you will open a complaint.

#### **Procedure: Opening a Complaint**

1. After you submit a customer complaint, you return to the **Search Complaints** page. You must close this page and navigate to the **Case** page to open a complaint.
2. The link to the **Case** page is available from your Oracle BPM Workspace.  
Click the **Case** link.
3. The **Case** page opens to the last case you accessed. You can perform activities on this complaint, per your role. If this is not the complaint you want to work on, you can select or search for another one.

Click the **Case Listing** button.

The screenshot displays the Oracle Business Process Workspace interface for a specific complaint case. The top navigation bar includes the Oracle logo, 'Business Process Workspace', and various menu items like 'Tasks', 'Case', 'Process Tracking', and 'Standard Dashboards'. The user is logged in as 'jcooper2'. The main header shows the case details: '[ 92 ] Complaint # CM000047 by Eli Wong'. Below this, there are tabs for 'Activities', 'Audit Trail', 'Data', and 'Documents'. The 'Audit Trail' tab is active, showing a list of events with timestamps. The 'Milestones' tab shows a list of milestones with their status (Completed, Open). The 'Stakeholders' tab shows a list of roles and their associated users.

4. The **Case Listing** pane displays the last few customer complaints worked on. You can select a complaint from the list and begin working on it. To search for a complaint, pin the pane to view the search field.

Click the **Pin** button.

5. Use the **Search** field to search for the complaint you want to work on.
6. You have completed the **Opening a Complaint** topic.

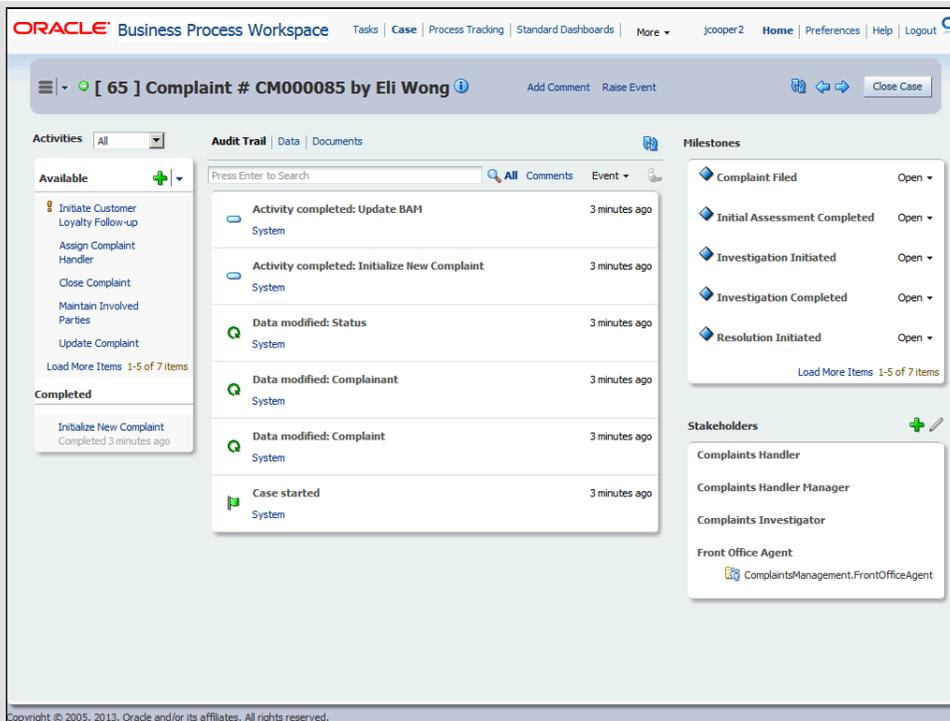
## Updating a Complaint

You filed a complaint. Now you want to update the details and attach a document.

In this topic, you will update a complaint and attach a document.

### **Procedure: Updating a Complaint**

1. Use the **Case** page to perform activities on a complaint.



2. First, add additional details to the complaint.

Click the **Update Complaint** link.

3. Use the **Update Complaint for the Complaint # *number*** page to modify any part of a complaint.

4. Edit the complaint as needed. In this example, the complaint has been updated for you.

Update Complaint for the Complaint # CM000085 Cancel Submit

**Customer Information** Search Add Edit

First Name: **Eli**  
Last Name: **Wong**  
Cell Phone:  
Email: **ewong@example.com**  
Address: **401 Island Parkway Redwood Shores California United States of America 94065**

**Complaint Information**

\* Summary: **Billing Dispute**

\* Category: **Billing** Type: **Unjustified Charge** Detail: **Finance Charge**

\* Narrative: **Customer claims his automatic payment was made on the day the payment was due so he should not be charged the finance charge. Customer is going to send payment confirmation.**

Customer Expectation: **Reverse the finance charges.**

**Additional Information**

**Case Information**

\* Severity: **Low** \* Priority: **Low**  
Notify By:  Email  Phone \* Channel: **Agent**

5. Save the changes.

Click the **Submit** button.

6. Next, attach the payment confirmation from the customer.

Click the **Documents** link.

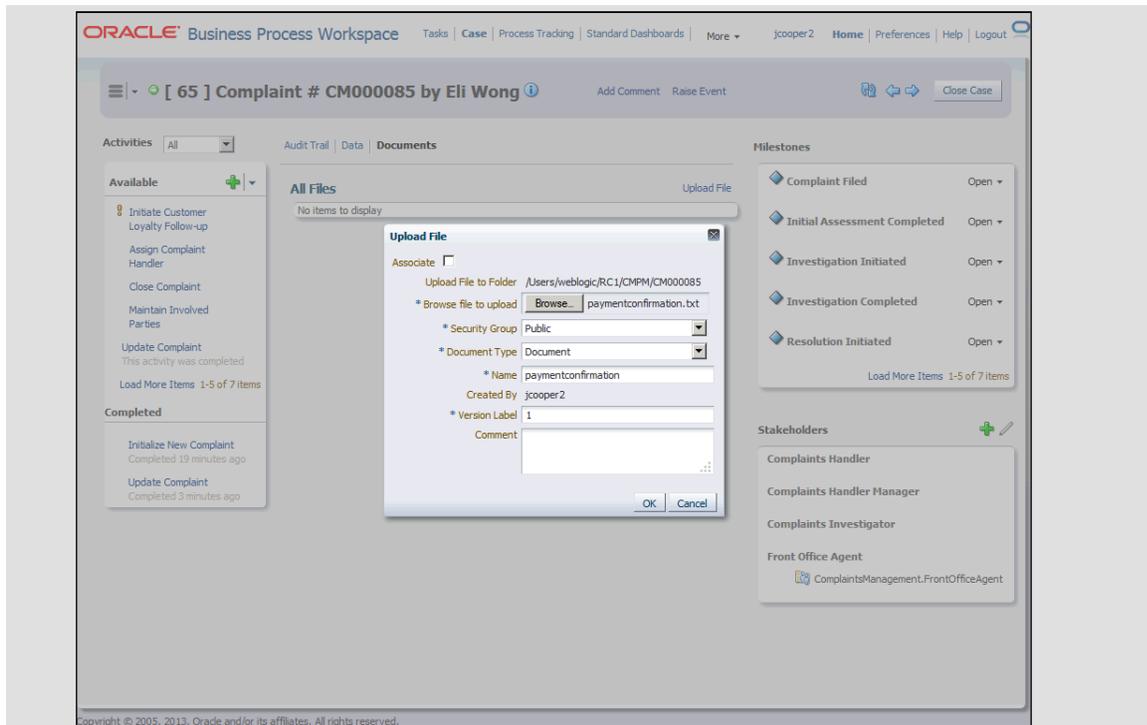
7. Click the **Upload File** link.

8. Use the **Upload File** dialog box to attach documents to the complaint.

9. In this example, the file has been selected for you.

**Note:** It is recommended that if you use Oracle WebCenter Content management to store files, then you should set the **Security Group** field to Public or Secure.

Click the **OK** button.



10. The payment confirmation document is now attached to the complaint.

11. You have completed the **Updating a Complaint** topic.

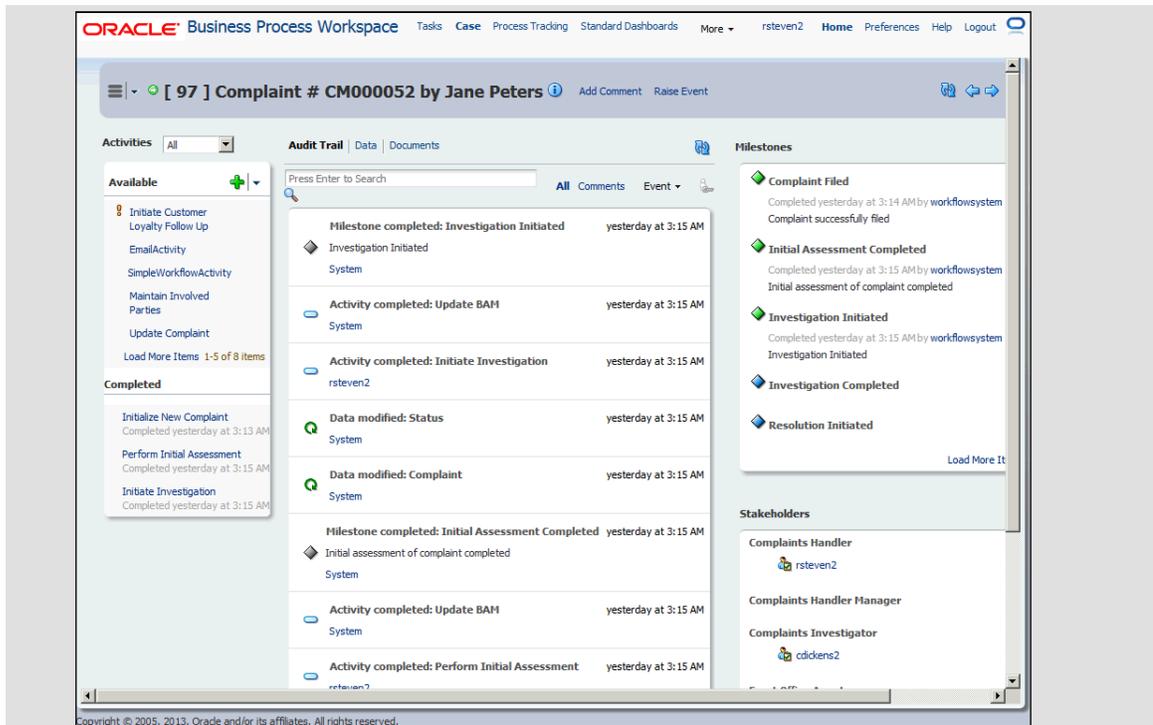
### Maintaining Involved Parties

You might need to maintain information on additional parties involved in a complaint. Any role can maintain additional party details.

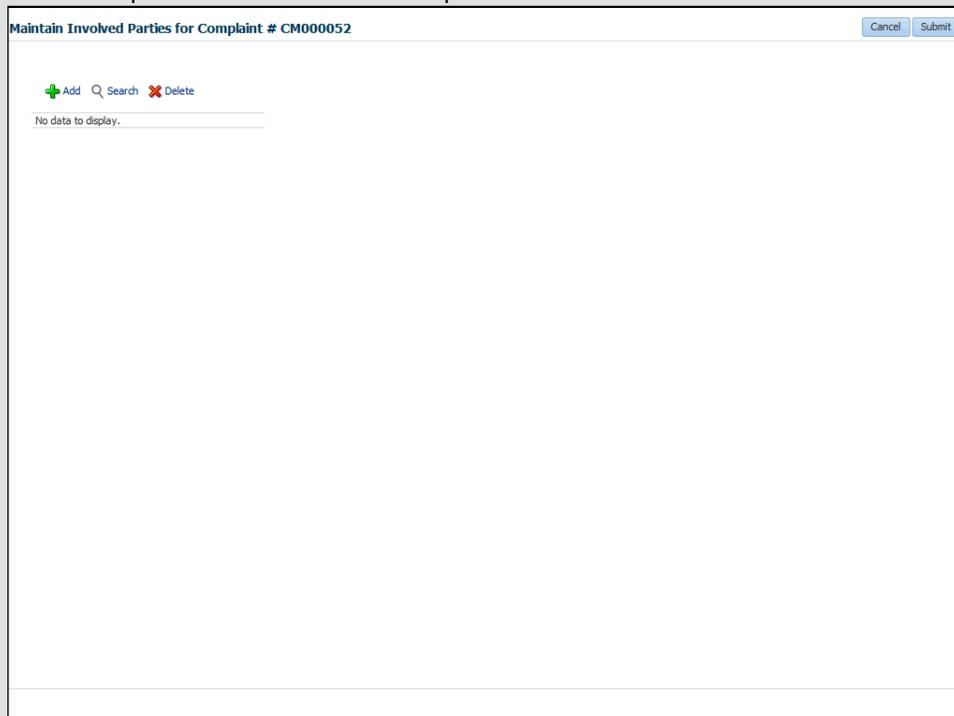
In this topic, you will add an additional party to a complaint.

#### **Procedure: Maintaining Involved Parties**

1. Use the **Case** page to perform activities on a complaint.



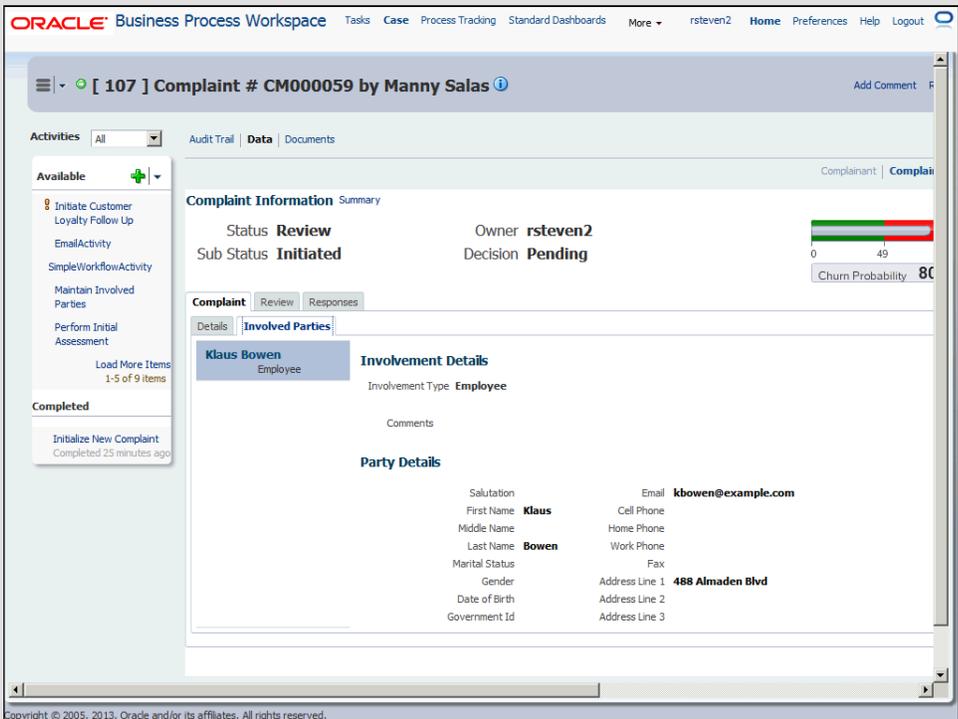
2. Click the **Maintain Involved Parties** link.
3. Use the **Maintain Involved Parties for Complaint # number** page to add or delete additional persons involved in a complaint.



4. You can add parties if they are already in the Oracle CPM database by using **Search**.
5. In this example, you will add a party.  
Click the **Add** button.

6. Click the **Involvement Type** list.
7. Click the **Employee** list item.
8. Complete the remaining fields as necessary. In this example, the fields have been completed for you.

9. Click the **Submit** button.
10. Navigate to the **Involved Parties** tab to verify the additional parties were added.  
Click the **Data** link.
11. Click the **Complaint** link.
12. Click the **Involved Parties** tab.
13. Use the **Involved Parties** tab to view the additional parties involved in a complaint.



14. You have completed the **Maintaining Involved Parties** topic.

## Assigning a Complaints Handler

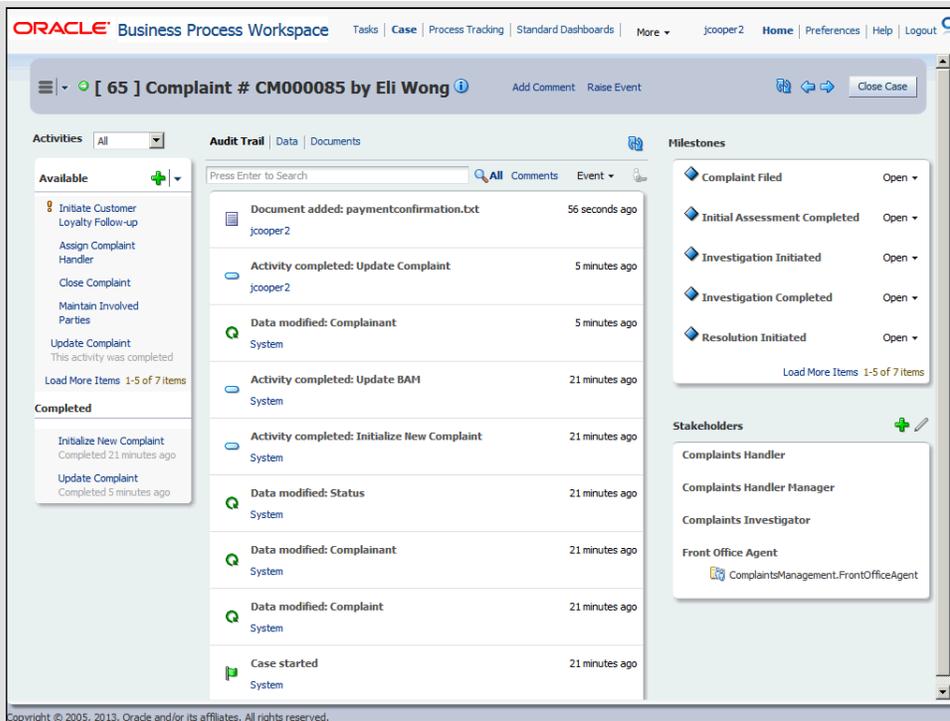
After you have completed your front office agent activities, you can assign a complaint to a complaints handler. By default, complaints handlers are automatically assigned based on the parametric roles configuration. You can change the assignment to manual. All complaints handlers receive a task notification with automatic assignment. When a complaints handler accepts the task, it is assigned to that person and the task is withdrawn from the other complaints handlers' workspace. Complaints that are manually assigned get routed directly to the assigned complaints handler.

Oracle CMPM has parametric roles for billing, customer service, and quality complaints. For example, if you assign a complaints handler to a customer service complaint using automatic assignment, then the complaint is routed to all users assigned to the customer service parametric role.

In this topic, you will manually assign a complaints handler.

### **Procedure: Assigning a Complaints Handler**

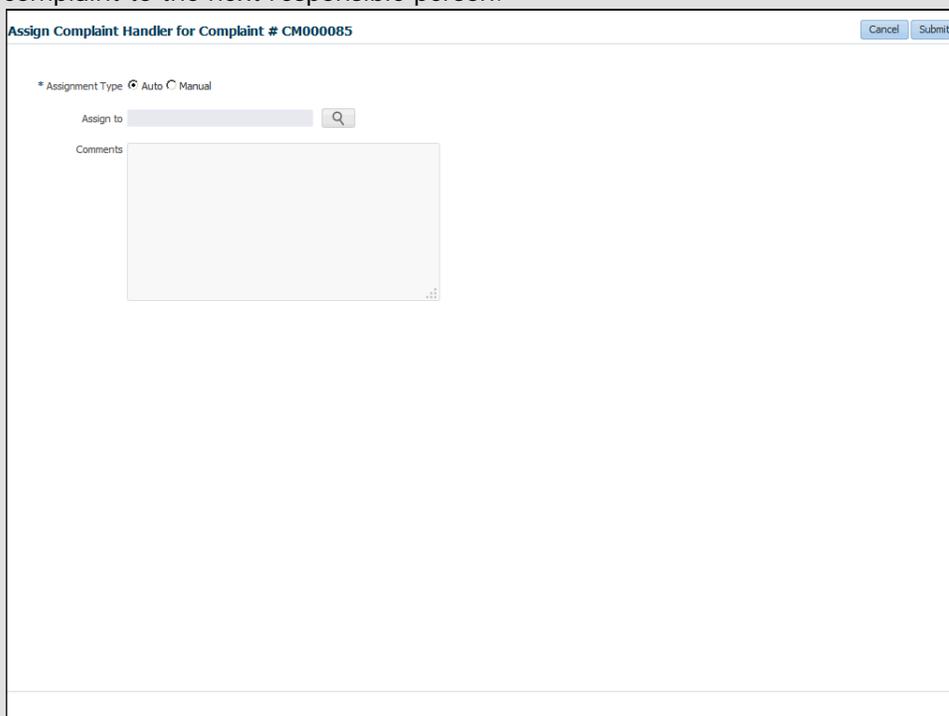
1. Use the **Case** page to perform activities on a complaint.



2. If you are a front office agent, you can assign a complaint to a complaints handler.

Click the **Assign Complaint Handler** link.

3. Use the **Assign Complaint Handler for Complaint # *number*** page to assign a complaint to the next responsible person.



4. By default, complaints handler assignment is automatic. In this example, you will manually assign a complaints handler.

Click the **Manual** option.

5. Click the **Search** button.
6. Use the **Role: ComplaintsManagement** dialog box to select a complaints handler to further process the complaint.
7. Select the person you want to assign the complaint to.

Click the option.

8. Click the **OK** button.
9. Click the **Submit** button.
10. After a complaints handler is manually assigned, the complaints handler role within the **Stakeholders** pane is updated with the person's name.

The complaints handler role is not updated for automatic assignments until a complaints handler accepts the task notification.

11. After the activities within the Filed phase are complete, the Complaint Filed milestone is set to **Completed**.
12. Click the **Data** link.
13. Click the **Complaint** link.
14. The complaint's status is changed to **Review** and the owner to the assigned complaints handler.
15. You have completed the **Assigning a Complaint Handler** topic.

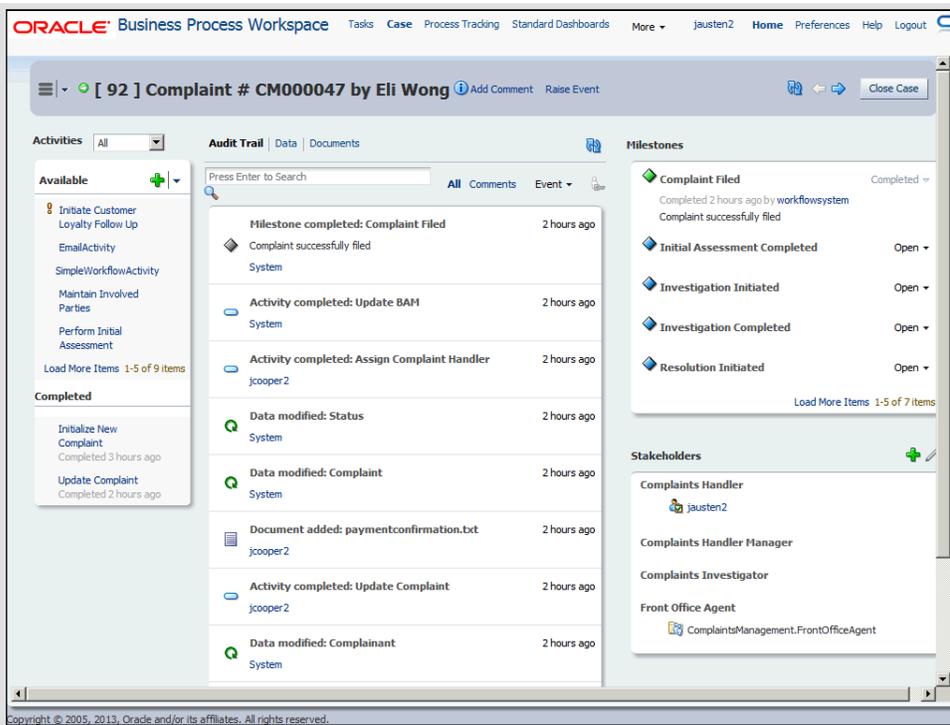
## Performing an Assessment

As a complaints handler, you assess complaints to determine if additional information is needed, if a complaint should be investigated, or if a complaint can be resolved. After you perform your assessment, use Oracle CPM to document your decision.

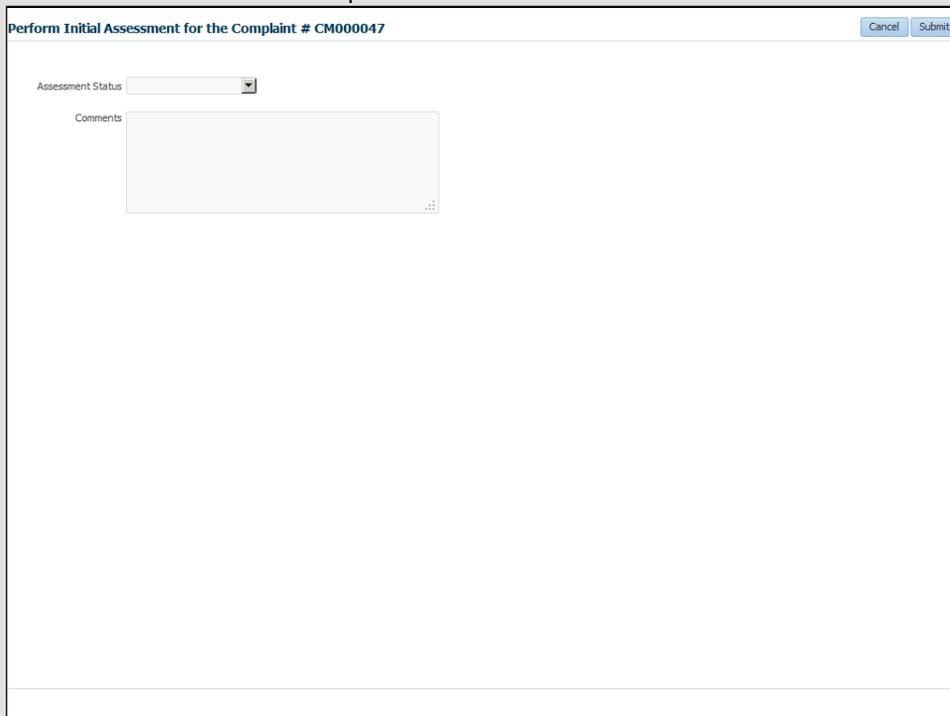
In this topic, you will set the assessment status for a complaint.

### ***Procedure: Performing an Assessment***

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Perform Initial Assessment** link.
3. Use the **Perform Initial Assessment for the Complaint # *number*** page to set the assessment status for a complaint.



4. Click the **Assessment Status** list.
5. Click the **Assessment Completed** list item.
6. Complete the remaining fields as necessary. In this example, the fields have been

completed for you.

**Perform Initial Assessment for the Complaint # CM000047** Cancel Submit

Assessment Status: Assessment Completed

Assessment Result: Investigation Required

Assessed Date: 2014-04-28 14:43:43

Assessed By: Jane Austen jausten2

Summary: Customer payment was received on the payment due date, investigate why is was not posted to his account.

Comments:

7. Click the **Submit** button.
8. After the activities within the Initial Assessment Completed phase are complete, the respective milestone is set to Completed.
9. You have completed the **Performing an Assessment** topic.

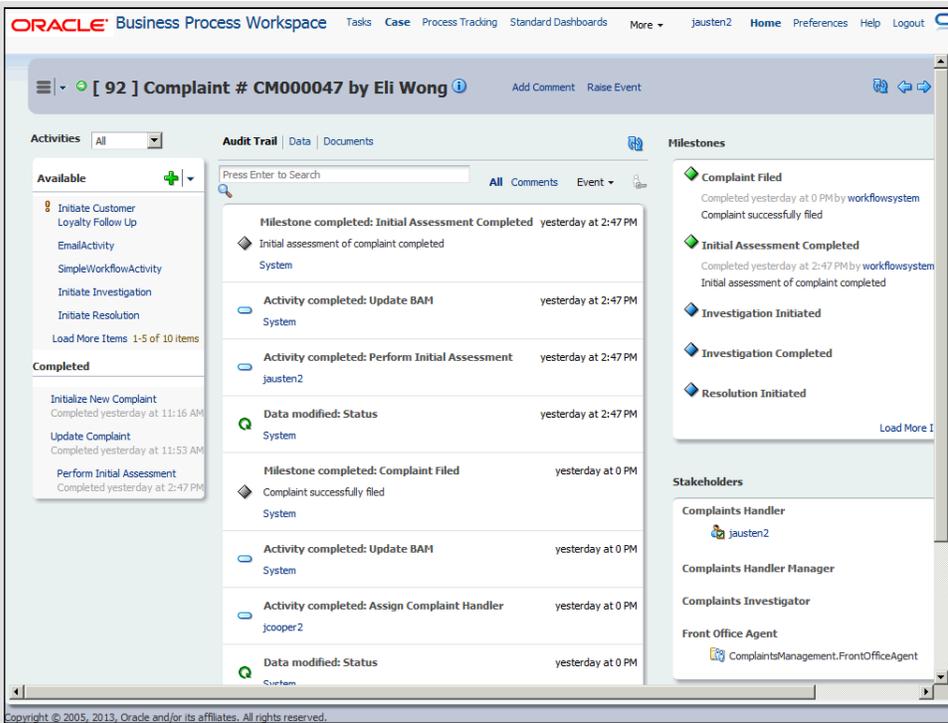
## Initiating an Investigation

As a complaints handler, once you determine an investigation is needed, you can assign a complaints investigator. By default, complaints investigators are automatically assigned. You can change the assignment to manual. All complaints investigators receive a task notification with automatic assignment. When a complaints investigator accepts the task, it is assigned to that person and the task disappears from the other complaints investigators workspace. Complaints that are manually assigned get routed directly to the assigned complaints investigator.

In this topic, you will automatically assign a complaints investigator.

### ***Procedure: Initiating an Investigation***

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Initiate Investigation** link.
3. Use the **Initiate Investigation for the Complaint # *number*** page to assign a complaint to a complaints investigator.

**Initiate Investigation for the Complaint # CM000047** Cancel Submit

\* Assignment Type  Auto  Manual

Investigator

Comments

4. By default, complaints investigator assignment is automatic. You can manually assign an investigator by selecting **Manual** and an investigator. In this example, the default is used.

Click the **Auto** option.

5. Click the **Submit** button.
6. Because the complaints investigator was automatically assigned, the complaints investigator role within the **Stakeholders** pane is not updated with an investigator's name until an investigator accepts the task notification.  
  
The complaints investigator role is updated with the investigator's name for manual assignments.
7. Because the complaints investigator was automatically assigned, the Investigation Initiated milestone remains open until an investigator accepts the task notification.  
  
The Investigation Initiated milestone is set to **Completed** for manual assignments.
8. Click the **Data** link.
9. Click the **Complaint** link.
10. The complaint's status remains in **Review** until a complaints investigator accepts the task notification, and then the status is changed to **Investigation**.
11. The owner field also remains set to the complaints handler until a complaints investigator accepts the task notification.
12. You have completed the **Initiating an Investigation** topic.

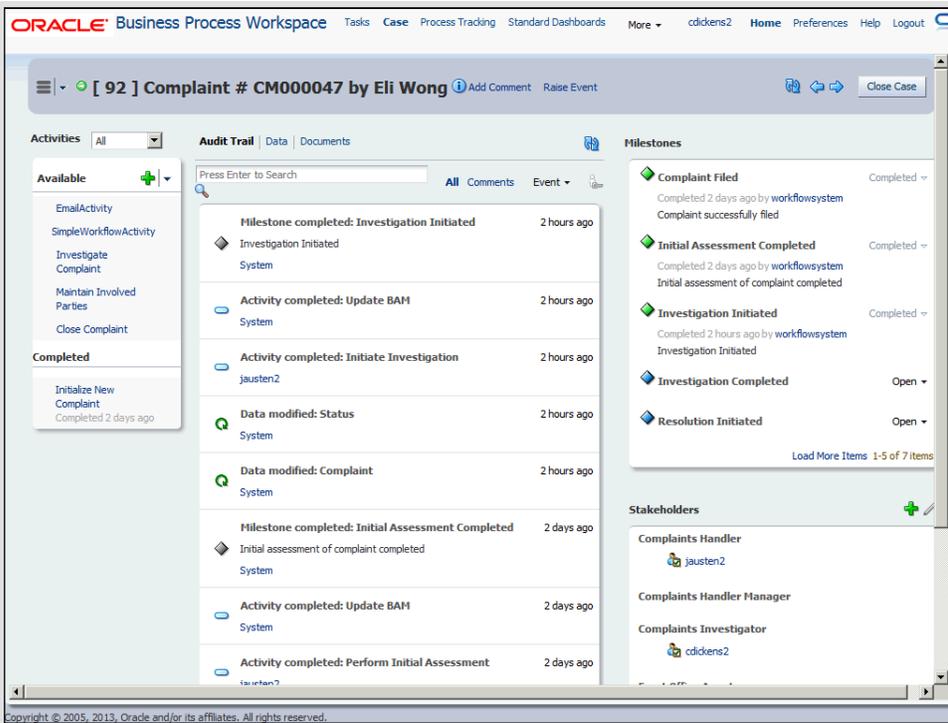
## Investigating a Complaint

As a complaints investigator, you investigate complaints by conducting interviews with the various parties involved and collecting and reviewing any related documentation. After your investigation, you document your findings in an investigation report for the complaints handler.

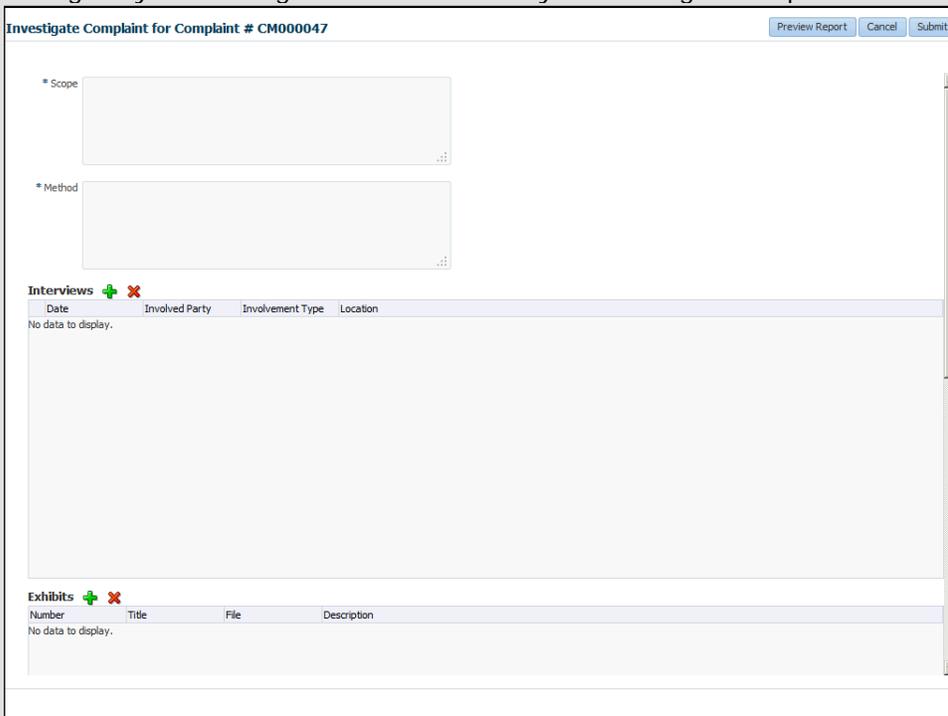
In this topic, you will document your findings for a complaint.

### ***Procedure: Investigating a Complaint***

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Investigate Complaint** link.
3. Use the **Investigate Complaint for Complaint # *number*** page to document the findings of your investigation. This becomes your investigation report.



4. Document the scope of the investigation.  
Click in the **Scope** field.
5. Enter the desired information into the **Scope** field. Enter "**Reviewing the**

documentation sent by the customer, and identifying why he was charged the finance fee".

- Document the method you used to perform the investigation.

Click in the **Method** field.

- Enter the desired information into the **Method** field. Enter "**Will manually review the customer documentation**".

- Add all parties you interviewed.

Click the **Add** button.

- Click the **Expand** button.

- Complete the fields as necessary for the parties you interviewed. Create a new line for each party interviewed. In this example, the fields have been completed for you.

The screenshot displays the 'Investigate Complaint for Complaint # CM000047' form. At the top right, there are buttons for 'Preview Report', 'Cancel', and 'Submit'. The form contains the following sections:

- \* Scope:** A text area containing the text: "Reviewing the documentation sent by the customer, and identifying why he was charged the finance fee".
- \* Method:** A text area containing the text: "Will manually review the customer documentation".
- Interviews:** A table with columns: Date, Involved Party, Involvement Type, and Location. It contains one row:
 

Date	Involved Party	Involvement Type	Location
2014-04-29 15:18	Eli Wong	Complainant	Phone interview
- Interview Detail:**
  - Notes:** A text area containing: "The customer made the payment through his bank's online bill pay system."
  - Summary:** An empty text area.
- Exhibits:** A table with columns: Number, Title, File, and Description. It shows "No data to display."

- You can attach any documentation used in your investigation to the report. Only documents that are already uploaded to the complaint can be attached to the report.

Click the **Add** button.

- Complete the fields as necessary. In this example, the fields have been completed for you.

Investigate Complaint for Complaint # CM000047 Preview Report Cancel Submit

\* Scope: Reviewing the documentation sent by the customer, and identifying why he was charged the finance fee

\* Method: Will manually review the customer documentation

**Interviews** + X

Date	Involved Party	Involvement Type	Location
2014-04-29 15:17:34	Eli Wong	Complainant	Phone interview

**Interview Detail**

Notes: The customer made the payment through his bank's online bill pay system.

Summary:

**Exhibits** + X

Number	Title	File	Description
1	paymentconfir	paymentconfirmation	Payment confirmation from customer

13. Review your report.

Click the **Preview Report** button.

14. The investigation report opens in your pdf viewer. This is an example of an investigation report. After you review the report, return to Oracle CMPM.

**COMPLAINT INVESTIGATION REPORT**

**Report Information**

Report Number: 1

Report Date: Wed Apr 30 15:23:14 PDT 2014

Lead Investigator: Charles Dickens odickens2

Investigation Completion Date:

**Complaint Information**

Complaint Number: CM000047

Complaint Open Date: Mon Apr 28 11:14:10 PDT 2014

Customer Name: Eli Wong

Customer Address: 401 Island Parkway United States of America California 94085

Complaint Summary: Billing Dispute

Complaint Description: Customer claims his automatic payment was made on the day the payment was due so he should not be charged the finance charge. Customer is going to send payment confirmation.

Customer Expectation: Reverse the finance charges.

**Interviews Conducted**

Interview with Eli Wong ( Complainant ) on Tue Apr 29 15:17:34 PDT 2014 at Phone interview

Notes: The customer made the payment through his bank's online bill pay system.

Summary:

**Exhibits Leveraged**

paymentconfirmation: Payment confirmation from customer

**Investigation Overview**

Scope: Reviewing the documentation sent by the customer, and identifying why he was charged the finance fee.

Method: Will manually review the customer documentation

**Conclusion**

Recommendation:

15. Click the **Vertical** scrollbar.

16. If you are finished with your investigation, document your recommendations and check

the **Investigation Complete** option. In this example, the fields have been completed for you.

Leave the **Investigation Complete** option blank if you want to continue to work on your investigation.

17. Submit your report.

Click the **Submit** button.

18. Until you mark the investigation as complete and submit it, the **Investigate Complaint** activity is available to continue working on your investigation report.

After you mark the investigation as complete, the **Submit Investigation Report** link becomes available, and the **Investigate Complaint** link is removed.

19. You can navigate to the **Investigation** tab to review your investigation data.

Click the **Data** link.

20. Click the **Complaint** link.

21. Click the **Review** tab.

22. Click the **Investigation** tab.

23. Use the **Investigation** tab to view a summary of your investigation report.

24. You have completed the **Investigating a Complaint** topic.

## Submitting an Investigation Report

After you, the complaints investigator, complete your investigation report you submit it to the complaints handler.

In this topic, you will submit an investigation report to a complaints handler.

## Procedure: Submitting an Investigation Report

1. Use the **Case** page to perform activities on a complaint.

The screenshot shows the Oracle Business Process Workspace interface for a specific complaint case. The header includes the Oracle logo, 'Business Process Workspace', and navigation links like 'Tasks', 'Case', 'Process Tracking', and 'Standard Dashboards'. The main content area is titled '[ 92 ] Complaint # CM000047 by Eli Wong' and includes options to 'Add Comment' and 'Raise Event'. The interface is divided into several sections: 'Activities' with a search bar and filters for 'All', 'Comments', and 'Event'; 'Available' activities including 'EmailActivity', 'SimpleWorkflowActivity', 'Investigate Complaint', 'Maintain Involved Parties', 'Submit Investigation Report', and 'Close Complaint'; 'Completed' activities including 'Investigate Complaint' and 'Initialize New Complaint'; 'Audit Trail' with a search bar and a list of events such as 'Activity completed: Investigate Complaint', 'Data modified: Status', 'Milestone completed: Investigation Initiated', 'Activity completed: Update BAH', 'Activity completed: Initiate Investigation', 'Data modified: Status', 'Data modified: Complaint', and 'Milestone completed: Initial Assessment Completed'; 'Milestones' with a list of events including 'Complaint Filed', 'Initial Assessment Completed', 'Investigation Initiated', 'Investigation Completed', and 'Resolution Initiated'; and 'Stakeholders' with roles like 'Complaints Handler', 'Complaints Handler Manager', and 'Complaints Investigator'. The footer contains the copyright notice: 'Copyright © 2005, 2013, Oracle and/or its affiliates. All rights reserved.'

2. Click the **Submit Investigation Report** link.
3. Use the **Submit Investigation Report for Complaint # *number*** page to submit an investigation report to the complaints handler.

The screenshot shows the 'Submit Investigation Report for Complaint # CM000047' page. The page has a title bar with the text 'Submit Investigation Report for Complaint # CM000047' and three buttons: 'View Report', 'Cancel', and 'Submit'. Below the title bar is a large text area labeled 'Comments' with a placeholder box and a small icon in the bottom right corner. The page is otherwise blank.

4. You can optionally add a comment for the complaints handler.  
Click in the **Comments** field.
5. Enter the desired information into the **Comments** field. Enter "**Complaint should be upheld.**".
6. Upon submission of the investigation report, the complaint is automatically routed back to the complaints handler.  
Click the **Submit** button.
7. After the activities within the Investigation phase are complete, the Investigation Completed milestone is set to **Completed**.
8. You can verify the complaint is routed back to the complaints handler.  
Click the **Data** link.
9. Click the **Complaint** link.
10. With the investigation complete, the complaint's status is set back to **Review**, and the owner is set back to the complaints handler.
11. You have completed the **Submitting an Investigation Report** topic.

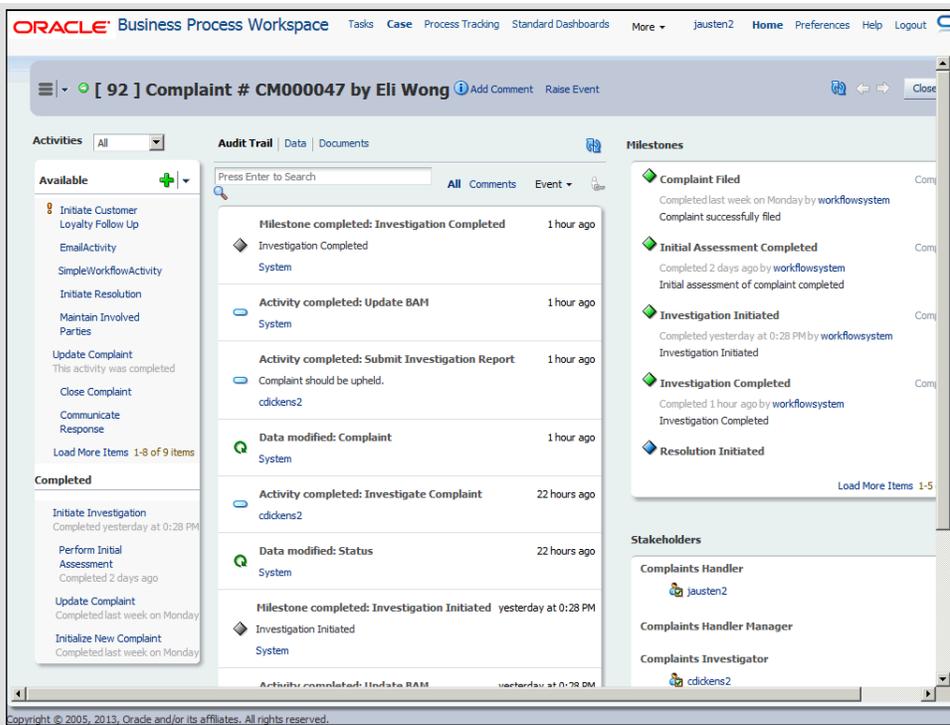
## Initiating a Resolution

After you, the complaints handler, complete your assessment and determine the validity of a complaint, you can initiate a resolution.

In this topic, you will initiate a resolution.

### ***Procedure: Initiating a Resolution***

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Initiate Resolution** link.
3. Use the **Initiate Resolution for Complaint # *number*** page to document whether a complaint is upheld or not upheld.

[Cancel](#) [Submit](#)

Decision: Pending

Comments:

4. Click the **Decision** list.
5. Click the **Complaint Upheld** list item.
6. Click the **Submit** button.

7. After a complaint resolution is initiated, the Resolution Initiated milestone is set to **Completed**.
8. Navigate to the **Data** page to see the complaint's status updates.  
Click the **Data** link.
9. Click the **Complaint** link.
10. With the resolution initiated, the complaint moves to the **Resolution** status and the decision is updated with your resolution decision.
11. You have completed the **Initiating a Resolution** topic.

## Creating a Response

As a complaint moves through the complaint lifecycle it can have various responses. As a complaints handler, you can create these responses to inform a customer of the progress. After a complaint response is submitted, Oracle CPM uses the Determine if Approval Required Ruleset to determine if the complaint response needs manager approval before it can be sent to the customer.

In this topic, you will create a response that does not need manager approval.

### Procedure: Creating a Response

1. Use the **Case** page to perform activities on a complaint.

The screenshot displays the Oracle Business Process Workspace interface for a specific complaint. The top navigation bar includes 'ORACLE Business Process Workspace' and various menu items like 'Tasks', 'Case', 'Process Tracking', and 'Standard Dashboards'. The main header shows the complaint details: '[ 92 ] Complaint # CM000047 by Eli Wong'. Below this, there are tabs for 'Activities', 'Audit Trail', 'Data', and 'Documents'. The 'Audit Trail' is active, showing a list of activities and milestones. The 'Milestones' section on the right shows a list of completed milestones. The 'Stakeholders' section at the bottom right shows the 'Complaints Handler' as 'jausten2'.

2. Click the **Create Complaint Response** link.
3. Use the **Create Response for Complaint # number** page to create responses you want to send to a customer.

The screenshot shows a web form titled "Create Response for Complaint # CM000047". At the top right, there are "Cancel" and "Submit" buttons. The form contains the following fields:

- Category:** A dropdown menu with a downward arrow.
- Type:** A dropdown menu with a downward arrow.
- Detail:** A dropdown menu with a downward arrow.
- Response Text:** A large text area with a small icon in the bottom right corner.
- Comments:** A large text area with a small icon in the bottom right corner.

4. Click the **Category** list.
5. Click the **Complaint Upheld** list item.
6. Click the **Type** list.
7. Click the **Compensation** list item.
8. Click the **Detail** list.
9. Click the **Refund** list item.
10. Various fields appear depending on what options you select for the **Category**, **Type**, and **Detail** fields.
11. Complete the remaining fields as necessary. In this example, the fields have been completed for you.

**Create Response for Complaint # CM000047** Cancel Submit

Category

Type

Detail

Amount

Payment Method

Reimbursement

Response Text

Comments

12. Submit the complaint response.

Click the **Submit** button.

13. You have submitted the complaint response. You must complete the Communicate Response activity to send the response to the customer.

14. You have completed the **Creating a Response** topic.

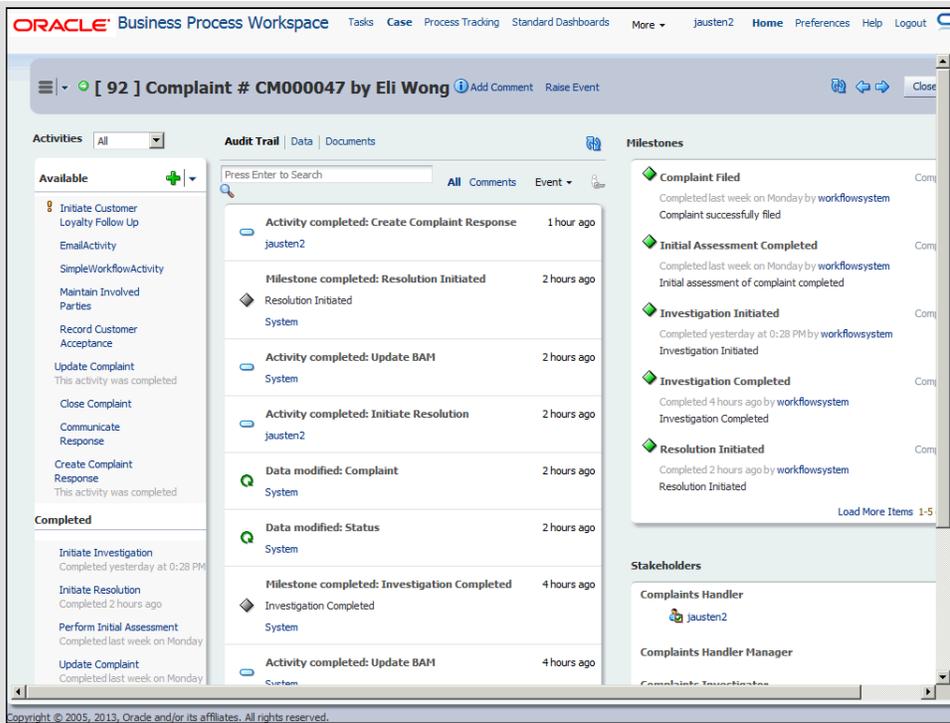
## Communicating a Response

After you complete a complaint response, and if it does not require manager approval, you can send the response to a customer.

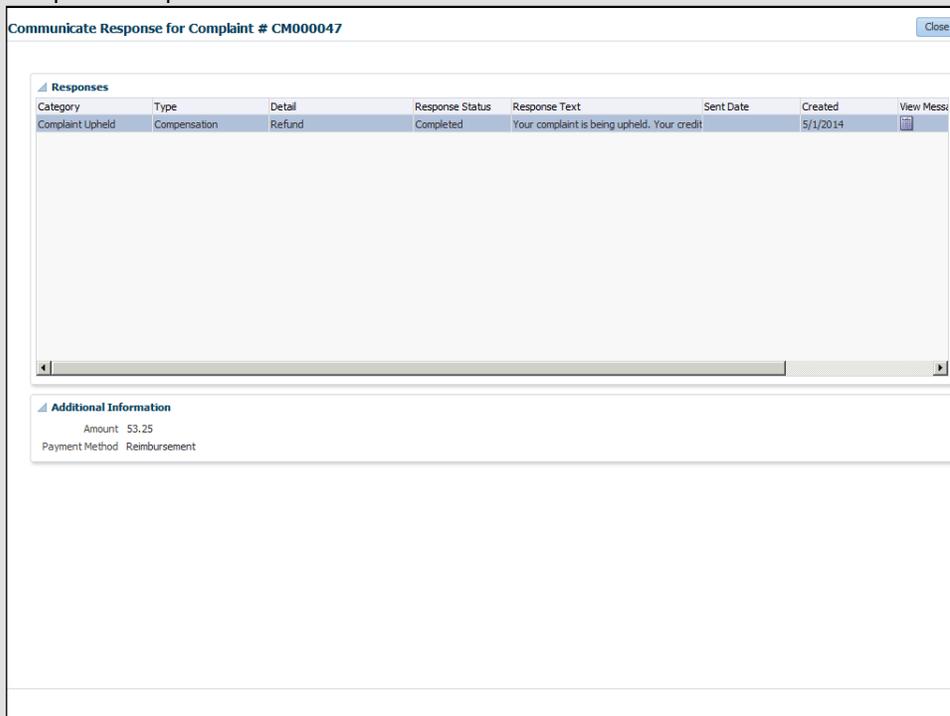
In this topic, you will communicate a response to a customer.

### ***Procedure: Communicating a Response***

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Communicate Response** link.
3. Use the **Communicate Response for Complaint # *number*** page to view and send a complaint response to a customer.



4. Click the **Horizontal** scrollbar.
5. If a complaint response does not require manager approval, then the View Message and Send Message icons display.

6. You can view the complaint response prior to sending.

Click the **View Message** button.

7. The complaint response opens in your pdf viewer. This is an example of a complaint response. After you review the response, return to Oracle CPM and send the response.



8. Click the **Send Message** button.
9. Click the **Close** button.
10. Navigate to the Responses tab to verify the complaint response was sent.  
Click the **Data** link.
11. Click the **Complaint** link.
12. Click the **Responses** tab.
13. Click the **Horizontal** scrollbar.
14. The **Sent Date** field confirms when the complaint response was sent.
15. You have completed the **Communicating a Response** topic.

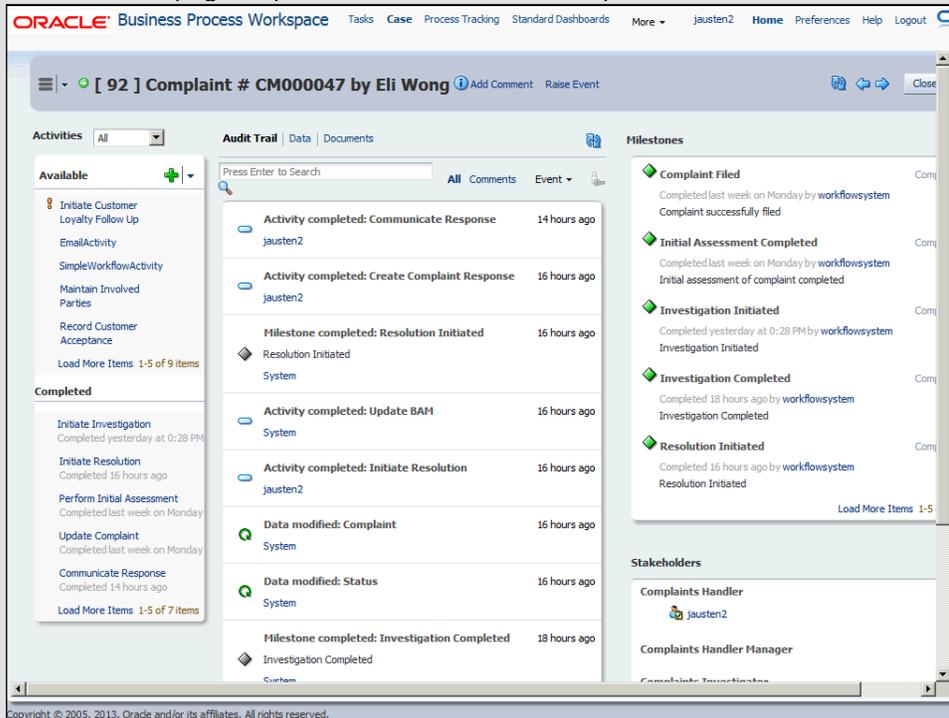
## Recording Customer Acceptance

As a complaints handler, you can document a customer's response to the resolution.

In this topic, you will record a customer's acceptance.

## Procedure: Recording Customer Acceptance

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Record Customer Acceptance** link.
3. Use the **Record Customer Acceptance for Complaint # *number*** page to document the customer's response to the resolution.



4. Click the **Outcome** list.
5. Click the **Resolution Accepted** list item.
6. Click the **Submit** button.
7. After the activities within the Resolution phase are complete and the customer accepts the resolution, the Complaint Resolved milestone is set to **Completed**.
 

**Note:** If a customer does not accept the resolution, the milestone remains open.
8. You have completed the **Recording Customer Acceptance** topic.

## Referring to Arbitration

A customer does not always accept the resolution offered. If this occurs, as the complaints handler, you may refer the complaint to arbitration.

In this topic, you will refer a complaint to arbitration.

### Procedure: Referring to Arbitration

1. Use the **Case** page to perform activities on a complaint.

The screenshot shows the Oracle Business Process Workspace interface for a complaint case. The main content area is titled 'Complaint # CM000067 by Manny Salas'. It features a central 'Audit Trail' section with a search bar and a list of activities. To the left is an 'Available' sidebar with various activity options, and to the right is a 'Milestones' sidebar showing the progress of the complaint. The 'Stakeholders' section at the bottom right lists roles like 'Complaints Handler' and 'Front Office Agent'.

Activity	Time Ago
Activity completed: Record Customer Acceptance	1 minute ago
Data modified: Status	1 minute ago
Activity completed: Create Complaint Response	5 minutes ago
Activity completed: Initiate Resolution	6 minutes ago
Data modified: Complaint	6 minutes ago
Data modified: Status	6 minutes ago
Activity completed: Perform Initial Assessment	7 minutes ago
Data modified: Status	7 minutes ago
Activity completed: Update Complaint	8 minutes ago

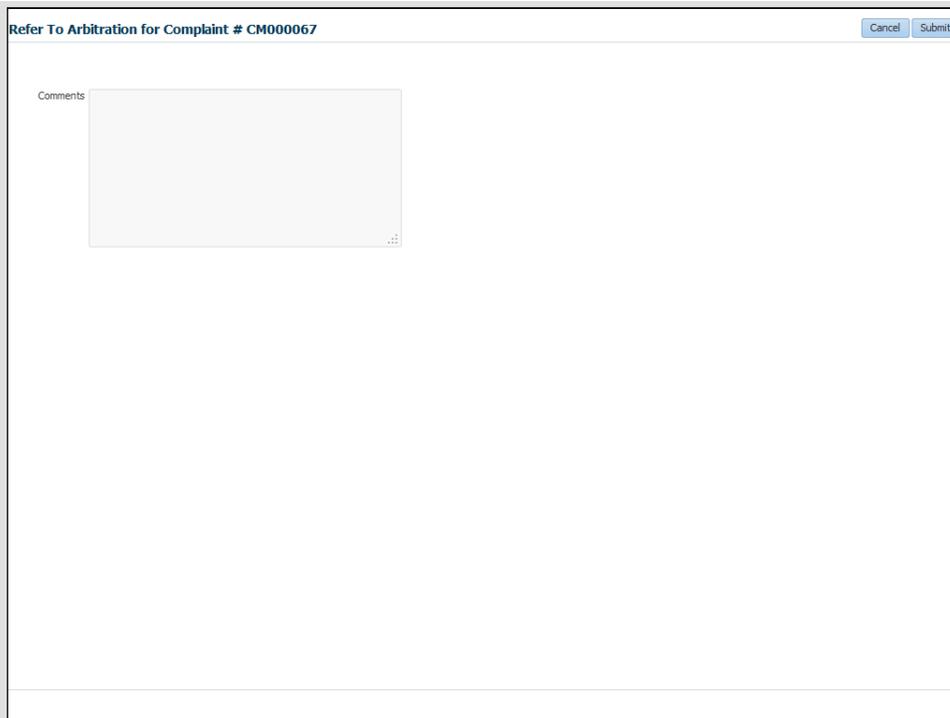
**Milestones:**

- Complaint Filed
- Initial Assessment Completed
- Investigation Initiated
- Investigation Completed
- Resolution Initiated

**Stakeholders:**

- Complaints Handler: rsteven2
- Complaints Handler Manager
- Complaints Investigator
- Front Office Agent: ComplaintsManagement.FrontOfficeAgent

2. Click the **Refer To Arbitration** link.
3. Use the **Refer to Arbitration for Complaint # *number*** page to send a complaint to arbitration.



Refer To Arbitration for Complaint # CM000067

Cancel Submit

Comments

4. Click in the **Comments** field.
5. Enter the desired information into the **Comments** field. Enter "**Customer does not accept the amount of loyalty points awarded.**".
6. Click the **Submit** button.
7. Navigate to the **Data** page to see the complaint has moved into arbitration.  
Click the **Data** link.
8. Click the **Complaint** link.
9. After the complaint is referred to arbitration the status is set to **Arbitration**.
10. You have completed the **Referring to Arbitration** topic.

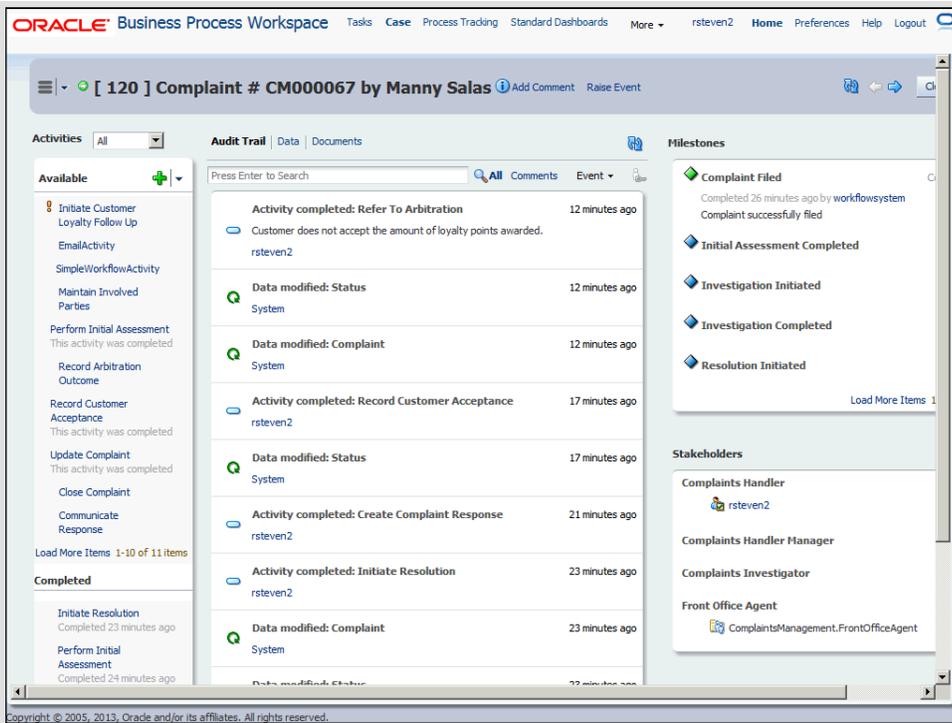
### Recording Arbitration Outcome

The arbitrator notifies you of her decision. As a complaints handler, you document the arbitration outcome in Oracle CMPM.

In this topic, you will record the arbitration outcome.

#### ***Procedure: Recording Arbitration Outcome***

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Record Arbitration Outcome** link.
3. Use the **Record Arbitration Outcome for Complaint # *number*** page to document an arbitrator's decision.

**Record Arbitration Outcome for Complaint # CM000067** Cancel Submit

Arbitration Status

Comments

4. Click the **Arbitration Status** list.
5. Click the **Complainant Lost** list item.
6. Click the **Submit** button.

- You have completed the **Recording Arbitration Outcome** topic.

## Initiating Customer Loyalty Follow Up

You can use the Initiate Customer Loyalty Follow Up activity to document your plan to retain customers with a high probability of leaving (churn). Only a front office agent or complaints handler can run the Initiate Customer Loyalty Follow Up activity any time during the complaint lifecycle. This activity can be run once, provided it is active. The Initiate Customer Loyalty Follow Up activity is active when the churn probability is greater than the threshold defined in the rules.

Oracle Complaints Management by default uses the Prediction Service Fallback Rules Ruleset to determine the probability of a customer leaving due to the complaints they file. If Oracle CPM is configured with R based predictive analytics, then the predictive model is used to determine the churn probability. Contact your system administrator to understand how your environment is configured.

In this topic, you will initiate customer loyalty follow up.

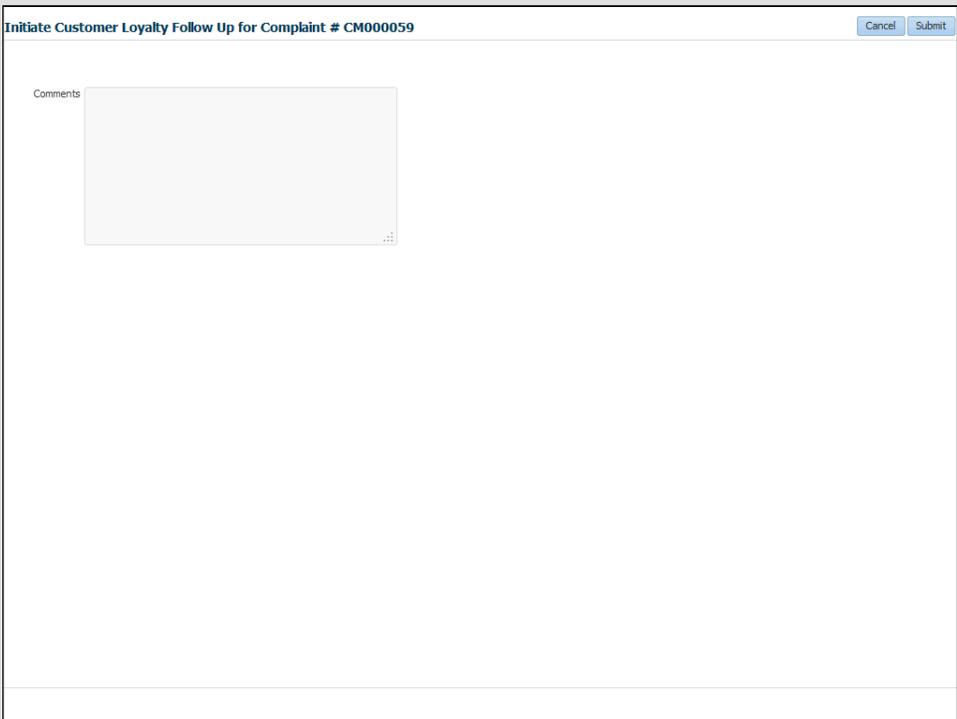
### Procedure: Initiating Customer Loyalty Follow Up

- Use the **Case** page to perform activities on a complaint.

- The Churn Probability image displays the probability of a customer leaving.

Since this complaint has a high probability of leaving, you will initiate customer loyalty follow up.

- Click the **Initiate Customer Loyalty Follow Up** link.
- Use the **Initiate Customer Loyalty Follow Up for Complaint # *number*** page to document your plan to retain a customer.



Initiate Customer Loyalty Follow Up for Complaint # CM000059

Cancel Submit

Comments

5. Click in the **Comments** field.
6. Enter the desired information into the **Comments** field. Enter "**Contact customer to restore their confidence in the company**".
7. Click the **Submit** button.
8. You have completed the **Initiating Customer Loyalty Follow Up** topic.

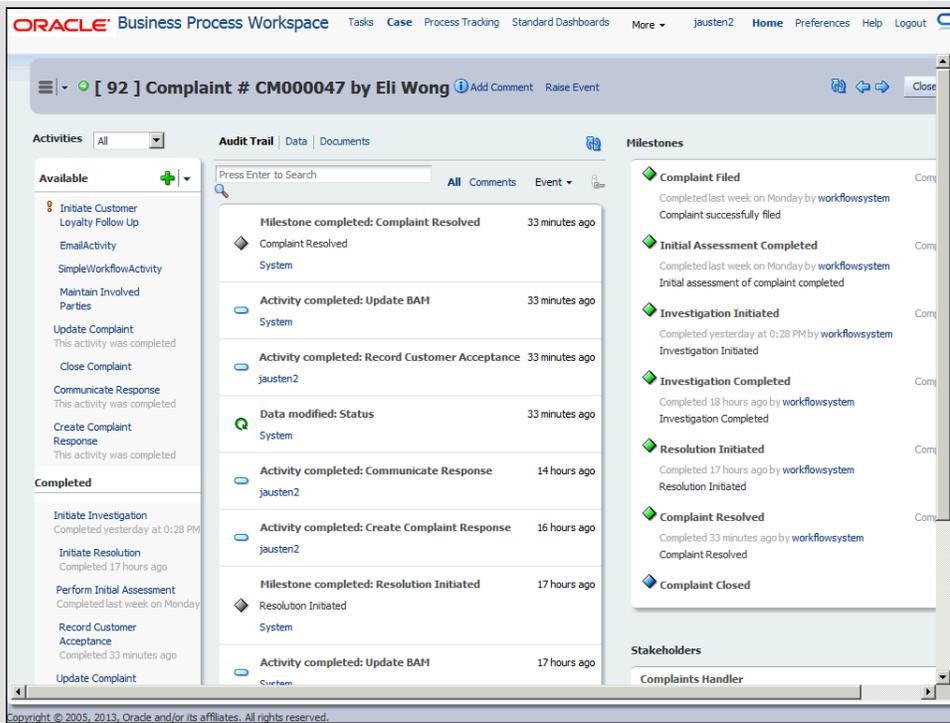
## Closing a Complaint

Any role can close a complaint at any time, provided the complaint is not already closed.

In this topic, you will close a complaint.

### ***Procedure: Closing a Complaint***

1. Use the **Case** page to perform activities on a complaint.



2. Click the **Close Complaint** link.
3. Use the **Close Complaint for Complaint # *number*** page to close a complaint.

The screenshot shows the 'Close Complaint for Complaint # CM000047' form. The form has a title bar with 'Cancel' and 'Submit' buttons. The main content area contains the following fields:

- \* Disposition:** A dropdown menu.
- \* Description:** A large text area with a vertical scrollbar.
- Comments:** A large text area with a vertical scrollbar.

4. Click the **Disposition** list.
5. Click the **Upheld Fulfilled** list item.
6. Click in the **Description** field.

7. Enter the desired information into the **Description** field. Enter "**Customer accepted resolution, his credit card has been refunded.**".
8. Click the **Submit** button.
9. After the complaint is closed, the Complaint Closed milestone is set to **Completed**.
10. Navigate to the **Data** page to see the complaint's status updates.  
Click the **Data** link.
11. Click the **Complaint** link.
12. With the complaint closed the status is updated to **Closed**.
13. You have completed the **Closing a Complaint** topic.

## Administering Oracle Complaints Management

This section is for administrators who maintain Oracle Complaints Management (CMPM). Use Oracle CMPM as delivered or modify it to meet your requirements. This section covers the data elements you can modify.

Upon completion of this section, you will be able to:

- Maintain the seeded data.
- Describe the Complaints Management Rules Ruleset.
- Describe the Determine if Approval Required Ruleset.
- Describe the Prediction Service Fallback Rules Ruleset.

### Maintaining the Seeded Data

Oracle CMPM ships with seeded data for the drop-down lists. This section covers the seeded data you can modify.

Upon completion of this section, you will be able to:

- Maintain lookup types.
- Maintain country and state codes.
- Maintain products.
- Maintain templates.

### *Maintaining Lookup Types*

Lookup type codes specify values used in complaints. Oracle Complaints Management ships with seeded values for lookup type codes. The seeded values are:

#### Arbitration Status

- Complainant Lost
- Complainant Won
- Initiated

#### Closed Disposition Status

- Complainant Lost
- Complainant Won Fulfilled
- Complainant Won No Action
- In Error
- Not Upheld
- Upheld Fulfilled
- Upheld No Action
- Withdrawn

Complaint Classification Level 1

- Billing
- Customer Service
- Quality

Complaint Classification Level 2

- Incorrect Amount
- Other
- Process
- Staff
- Unclear Statement
- Unjustified Charge

Complaint Classification Level 3

- Currency Conversion Fees
- Finance Charge
- Interest Rate
- Loyalty Points
- Maintenance Fees
- Unacceptable Delay
- Unhelpful
- Unprofessional Behavior

Complaint Notification Preference

- Email
- Phone

Complaint Priority

- High
- Low
- Medium

Complaint Reported Channel

- Agent
- Call Center
- Complaint Form
- Phone
- Web

Complaint Response Classification Level 1

- Acknowledgement
- Complaint Not Upheld
- Complaint Upheld
- Intermediate Response

Complaint Response Classification Level 2

- Apology
- Compensation
- Customer Side Delay
- Goodwill Gift
- Initial Assessment
- Investigation
- Process Delay

Complaint Response Classification Level 3

- Apology
- Conforms to Agreement
- Customer Did Not Pursue
- Customer Did Not Respond
- Delayed Investigation
- Information Not Accessible
- Loyalty Points
- No Breach Determined
- Refund

Complaint Severity

- High
- Low
- Medium

Filed Status

- Completed
- In Progress
- Initiated

Initial Assessment Result

- Complaint Not Valid

- Complaint Valid
- Investigation Required

Investigation Status

- Completed
- In Progress
- Initiated

Involvement Type

- Accused
- Campaign Manager
- Complainant
- Employee
- Witness

Resolution Status

- In Negotiation
- Initiated
- Resolution Accepted
- Resolution Not Accepted

Resolution Type

- Complaint Not Upheld
- Complaint Upheld
- Pending

Response Status

- Completed
- Created
- Rejected

Review Status

- Assessment Completed
- Assessment In Progress
- Initiated

Status Code

- Arbitration
- Closed

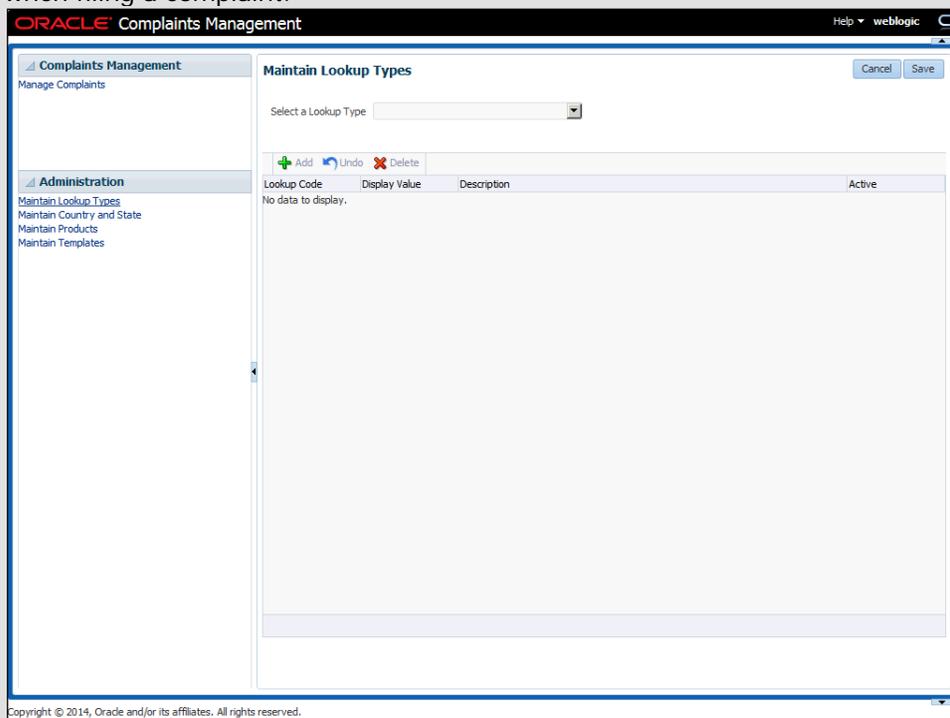
- Filed
- Investigation
- Resolution
- Review

You can add additional lookup type codes to meet your organization's needs.

In this topic, you will modify lookup type code options.

### **Procedure: Maintaining Lookup Types**

1. Begin by navigating to the **Maintain Lookup Types** page.  
Click the **Links** link.
2. Click the **Manage Complaints** link.
3. Click the **Maintain Lookup Types** link.
4. Use the **Maintain Lookup Types** page to modify the lookup type codes made available when filing a complaint.



5. Click the **Select a Lookup Type** list.
6. These are the lookup types shipped with Oracle CPM. You modify all lookup types using the same steps.  
Click the **Complaint Priority** list item.
7. Add a lookup type code.  
Click the **Add** button.

8. **Lookup Codes** are unique keys in the data tables and built into the logic of Oracle CMPM.  
  
Click in the **Lookup Code** field.
9. A **Lookup Code** can be upper or lower case.  
  
Enter the desired information into the **Lookup Code** field. Enter "**URGENT**".
10. Specify a display name. The name value appears when filing a complaint.  
  
Click in the **Display Value** field.
11. Enter the desired information into the **Display Value** field. Enter "**Urgent**".
12. Use the **Description** field to add an optional description.  
  
Click in the **Description** field.
13. Enter the desired information into the **Description** field. Enter "**Urgent Priority**".
14. Saving the lookup type code makes it available when you file a complaint.  
  
Click the **Save** button.
15. The lookup type code **Urgent** is now added.
16. To modify a lookup code:
  1. Select the lookup code you want to modify.
  2. Modify the field, then click **Save**.
17. There are two types of delete, a soft delete and a hard delete.  
  
A soft delete inactivates a lookup type code already used in complaints. Inactivated codes are not displayed as options when filing a complaint.  
  
To perform a soft delete:
  1. Select the lookup code you want to deactivate.
  2. Uncheck **Active**, then click **Save**.
18. A hard delete removes the lookup type code from the database table.  
  
To perform a hard delete:
  1. Select the lookup code you want to delete.
  2. Click **Delete**, click **OK**, then click **Save**.
19. If you have not saved a modification, then you can reverse it using the **Undo** button.
20. You have completed the **Maintaining Lookup Type Codes** topic.

### ***Maintaining Country and State Codes***

Country and state codes enable a front office agent or customer to specify the country and state where the complaint occurred when filing a complaint. Oracle Complaints Management ships with seeded values for country and state codes. The seeded values are:

### Country Codes

- Argentina
- Australia
- Brazil
- Cameroon
- Canada
- China
- France
- India
- Somalia
- United Kingdom
- United States of America

### State Codes (listed by country)

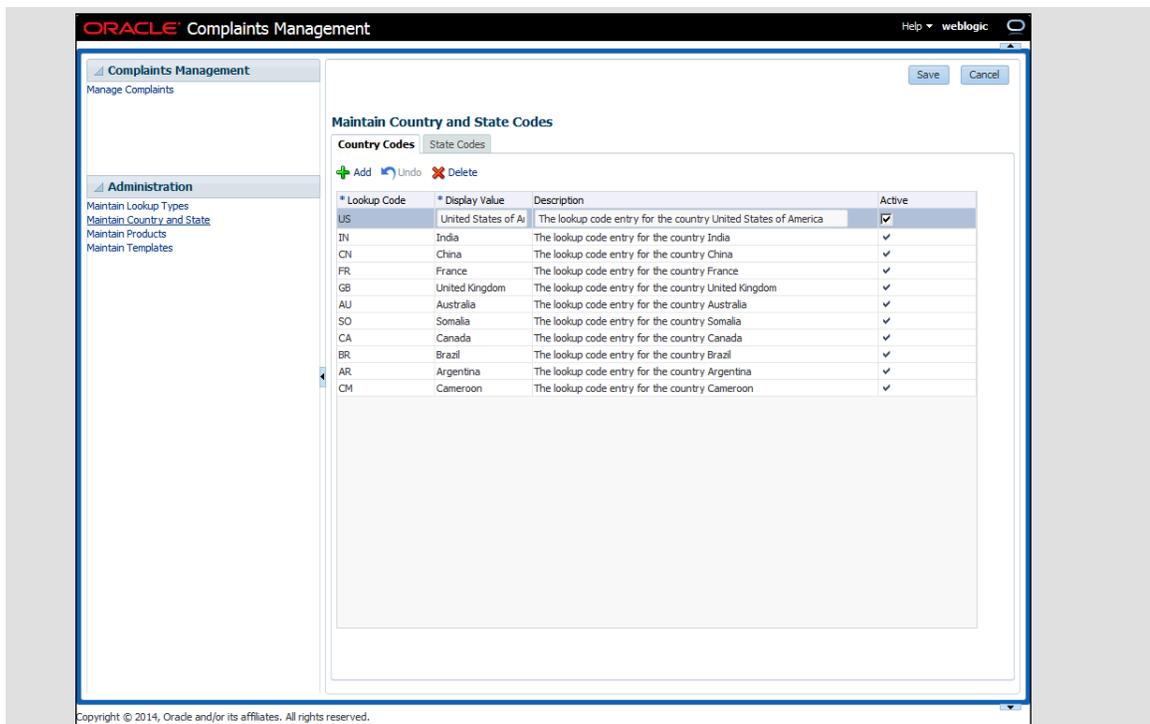
- Argentina: Buenos Aires Province, Catamarca Province, Chaco Province, Chubut Province, Mendoza Province
- Australia: Northern Territory, South Australia, Tasmania, Western Australia, Victoria
- Brazil: Acre, Amazonas, Bahia, Rio de Janeiro, Alagoas
- Cameroon: Awing, Babungo, Bakossi
- Canada: Alberta, British Columbia, Saskatchewan, Quebec, Ontario
- China: Anhu, Fujian, Shandong, Henan, Shaanxi
- France: Alsace, Aquitaine, Picardy, Burgundy, Upper Normandy
- India: Karnataka, Maharashtra, West Bengal, Tamil Nadu, Uttar Pradesh
- Somalia: Somaliland, Puntland, Galmudug
- United Kingdom: Essex, Derbyshire, Lincolnshire, Nottinghamshire, Surrey
- United States of America: California, Arizona, Massachusetts, Florida, Texas, New York

You can add additional country and state codes to meet your organization's needs.

In this topic, you will modify options for country codes.

### ***Procedure: Maintaining Country and State Codes***

1. Begin by navigating to the **Maintain Country and State Codes** page.  
Click the [Links](#) link.
2. Click the [Manage Complaints](#) link.
3. Click the [Maintain Country and State](#) link.
4. Use the **Maintain Country and State Codes** page to modify the country and state codes made available when filing a complaint.



5. Use the **Country Codes** tab to modify the country codes.
6. Add a country code.  
Click the **Add** button.
7. **Lookup Codes** are unique keys in the data tables and built into the logic of Oracle CMPM.  
Click in the **Lookup Code** field.
8. A **Lookup Code** can be upper or lower case.  
Enter the desired information into the **Lookup Code** field. Enter "**PT**".
9. Specify a display name. The name value appears when filing a complaint.  
Click in the **Display Value** field.
10. Enter the desired information into the **Display Value** field. Enter "**Portugal**".
11. Use the **Description** field to add an optional description.  
Click in the **Description** field.
12. Enter the desired information into the **Description** field. Enter "**Portugal country code**".
13. Saving the country code makes it available when you file a complaint.  
Click the **Save** button.
14. The country code **Portugal** is now added.

15. To modify a country code:
  1. Select the country code you want to modify.
  2. Modify the field, then click **Save**.

16. There are two types of delete, a soft delete and a hard delete.

A soft delete inactivates a country code already used in complaints. Inactivated codes are not displayed as options when filing a complaint.

To perform a soft delete:

1. Select the country code you want to deactivate.
2. Uncheck **Active**, then click **Save**.

17. A hard delete removes the country code from the database table.

To perform a hard delete:

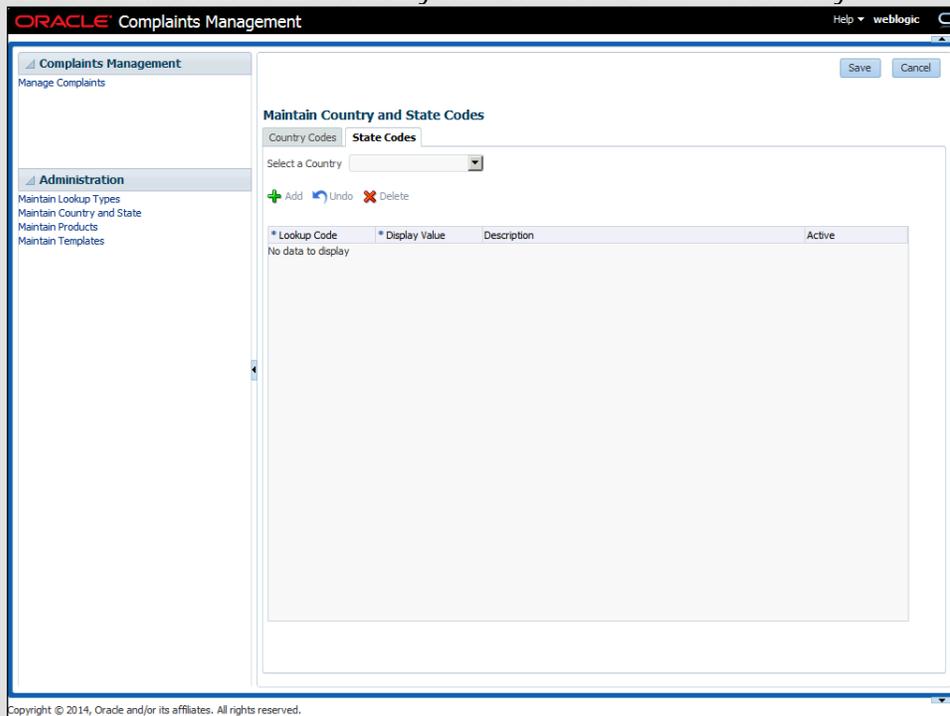
1. Select the country code you want to delete.
2. Click **Delete**, click **OK**, then click **Save**.

18. If you have not saved a modification, then you can reverse it using the **Undo** button.

19. Add a state code.

Click the **State** tab.

20. Use the **State Codes** tab to modify state codes for a selected country.



21. After you select a country code, you modify state codes the same as you modified the country codes.

22. You have completed the **Maintaining Country and State Codes** topic.

## ***Maintaining Products***

When filing a complaint, the front office agent can select what product and product information the customer has a complaint against. Oracle Complaints Management ships with seeded values for products and product information. The seeded values are:

### Product Categories

- Asset
- Appliances
- Automobiles

### Product Types (listed by product category)

- Asset: Consumer Credit
- Appliances: Household Appliances
- Automobiles: Cars

### Product Sub Types (listed by product type)

- Consumer Credit: Credit Card, Consumer Loan
- Household Appliances: Dishwashers, Air Conditioner
- Cars: 4 Door Sedan, Sports Utility Vehicles

### Product Codes (listed by product sub type)

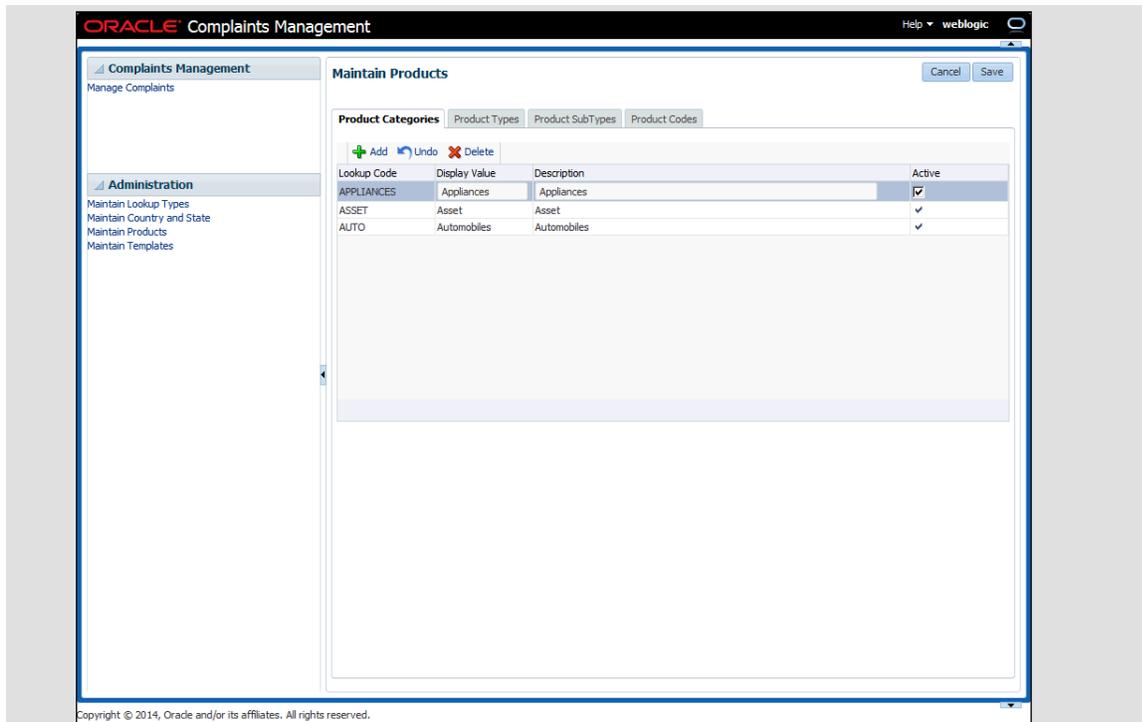
- Credit Card: Gold Credit Card, Platinum Credit Card
- Consumer Loan: No seeded values
- Dishwashers: DW100 Dishwasher, DW120 Heavy Duty Dishwasher
- Air Conditioner: PS100 Power Saver Air Conditioner
- 4 Door Sedan: No seeded values
- Sports Utility Vehicles: Veracruz SL3900, Santa Fe SL3223

You can add additional products and product information to meet your organization's needs.

In this topic, you will modify options for products.

### ***Procedure: Maintaining Products***

1. Begin by navigating to the **Maintain Products** page.  
Click the [Links](#) link.
2. Click the [Manage Complaints](#) link.
3. Click the [Maintain Products](#) link.
4. Use the **Maintain Products** page to modify the products and product information made available when filing a complaint.



5. Use the **Product Categories** tab to modify the product categories.
6. Add a product category.  
Click the **Add** button.
7. **Lookup Codes** are unique keys in the data tables and built into the logic of Oracle CPM.
- Click in the **Lookup Code** field.
8. A **Lookup Code** can be upper or lower case.  
Enter the desired information into the **Lookup Code** field. Enter "**Furniture**".
9. Specify a display name. The name value appears when filing a complaint.  
Click in the **Display Value** field.
10. Enter the desired information into the **Display Value** field. Enter "**Furniture**".
11. Use the **Description** field to add an optional description.  
Click in the **Description** field.
12. Enter the desired information into the **Description** field. Enter "**Furniture pieces**".
13. Saving the product category makes it available when you file a complaint.  
Click the **Save** button.
14. The product category **Furniture** is now added.
15. To modify a product category:

1. Select the product category you want to modify.

2. Modify the field, then click **Save**.

16. There are two types of delete, a soft delete and a hard delete.

A soft delete inactivates a product category already used in complaints. Inactivated product categories are not displayed as options when filing a complaint.

To perform a soft delete:

1. Select the product category you want to deactivate.

2. Uncheck **Active**, then click **Save**.

17. A hard delete removes the product category from the database table.

To perform a hard delete:

1. Select the product category you want to delete.

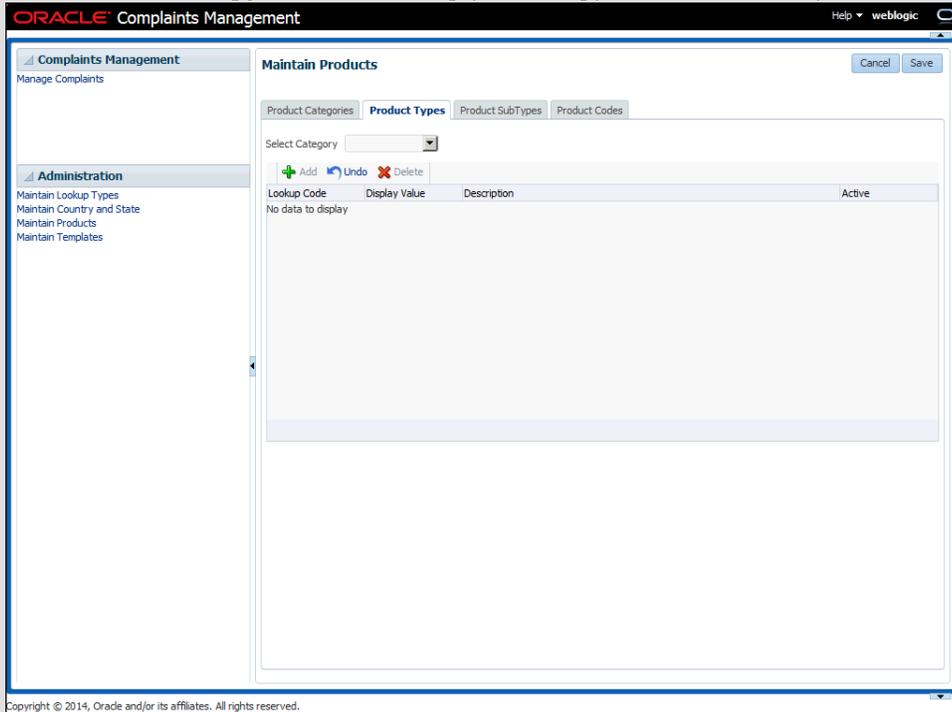
2. Click **Delete**, click **OK**, then click **Save**.

18. If you have not saved a modification, then you can reverse it using the **Undo** button.

19. Add a product type.

Click the **Product Types** tab.

20. Use the **Product Types** tab to modify product types for a selected product category.

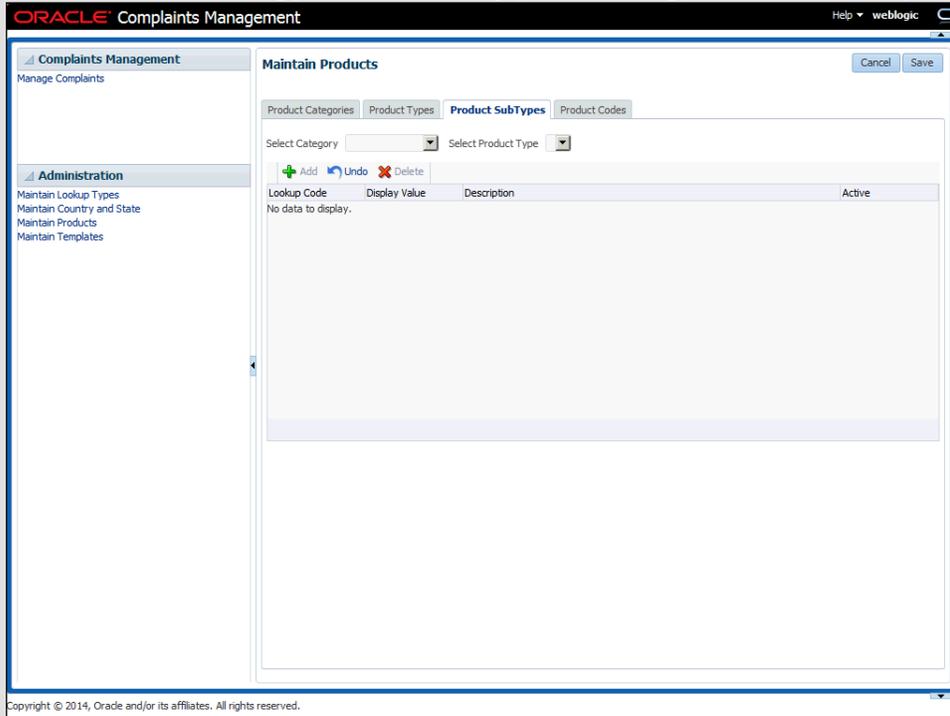


21. After you select a product category, you modify product types the same as you modified the product categories.

22. Add a product subtype.

Click the **Product SubTypes** tab.

23. Use the **Product Subtypes** tab to modify product subtypes for a selected product type.

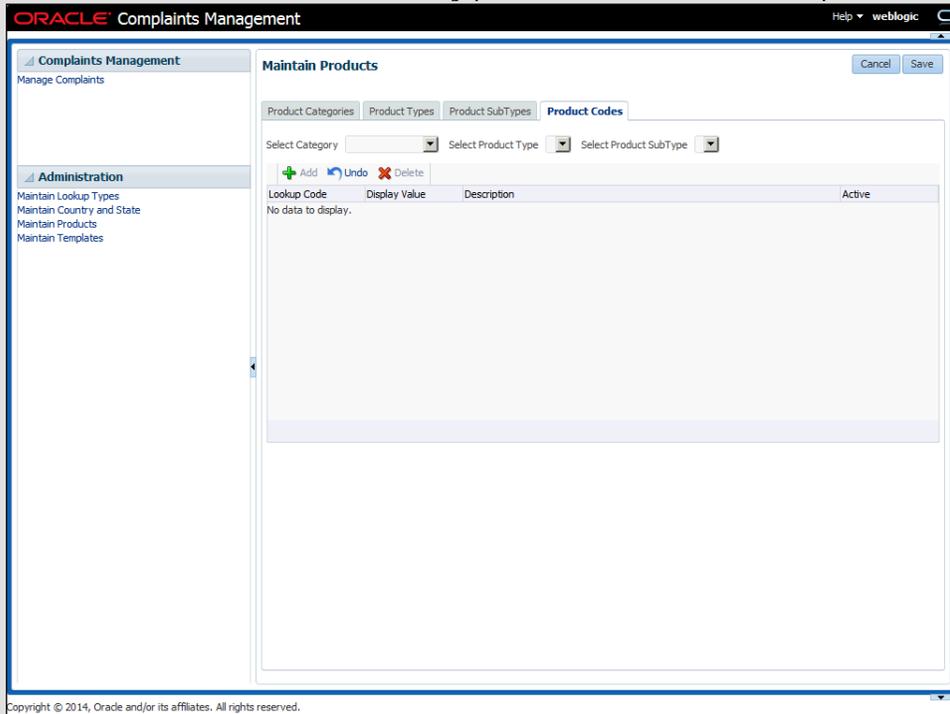


24. After you select a category and product type, you modify product subtypes the same as you modified the product categories.

25. Add a product code.

Click the **Product Codes** tab.

26. Use the **Product Codes** tab to modify product codes for a selected product subtype.



27. After you select a category, product type, and product subtype, you modify product codes the same as you modified the product categories.
28. You have completed the **Maintaining Products** topic.

### ***Maintaining Templates***

Oracle Complaints Management ships with predefined templates for customer correspondence and investigation reports. A complaints handler can use a customer correspondence template to respond to a customer. An investigator can use an investigation report template to document his finding. The predefined templates for each template type are:

#### Customer Correspondence Templates

- Complaint Upheld - Compensation, Loyalty Points
- Complaint Upheld - Compensation, Refund
- Complaint Not Upheld - Initial Assessment, Conforms to Agreement
- Complaint Not Upheld - Investigation, No Breach Determined
- Intermediate Response - Customer Side Delay, Customer Did Not Respond
- Intermediate Response - Process Delay, Delayed Investigation

#### Investigation Templates

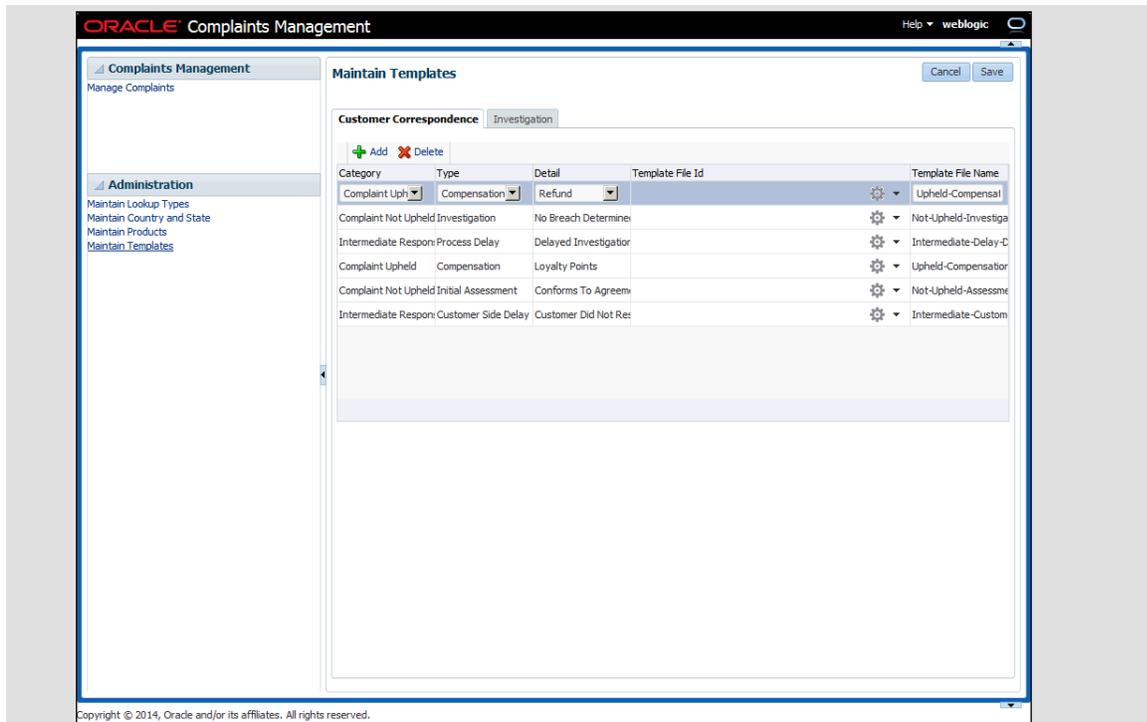
- Investigation Template Report

You can add additional templates to meet your organization's needs.

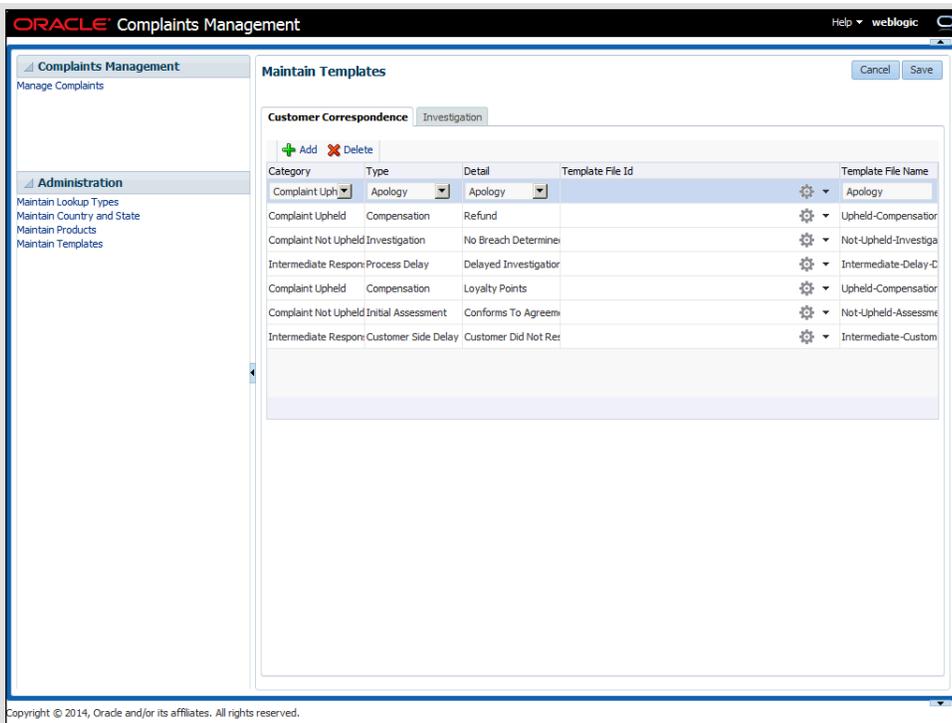
In this topic, you will add and delete templates.

### ***Procedure: Maintaining Templates***

1. Begin by navigating to the **Maintain Templates** page.  
Click the **Links** link.
2. Click the **Manage Complaints** link.
3. Click the **Maintain Templates** link.
4. Use the **Maintain Templates** page to modify the customer correspondence and investigation templates.



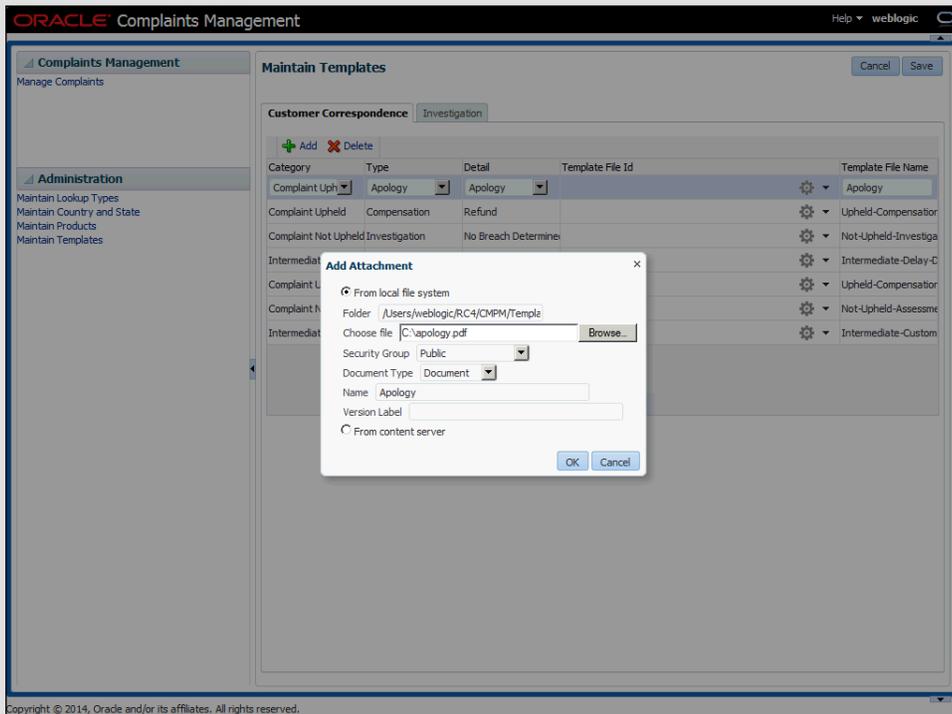
5. Use the **Customer Correspondence** tab to add templates for the complaints handler to utilize when responding to a customer.
6. Add a customer correspondence template.  
Click the **Add** button.
7. Click an entry in the row.
8. Select the category, type, and detail, then enter a template file name. In this example, the fields have been completed for you.



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9. Click the **Action** list.
10. Click the **Add** list item.
11. Use the **Add Attachment** dialog box to attach a template.
12. In this example, the template has been selected for you.

Click the **OK** button.



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13. Save the template.

Click the **Save** button.

14. The template is now attached.

15. Oracle CMPM uses the first template in the database table for the customer response. If you add additional templates for the same category, type, and detail; where a template already exists, then check out the existing template and check in the new template. This updates the database table and activates the new template to be used for the customer response.

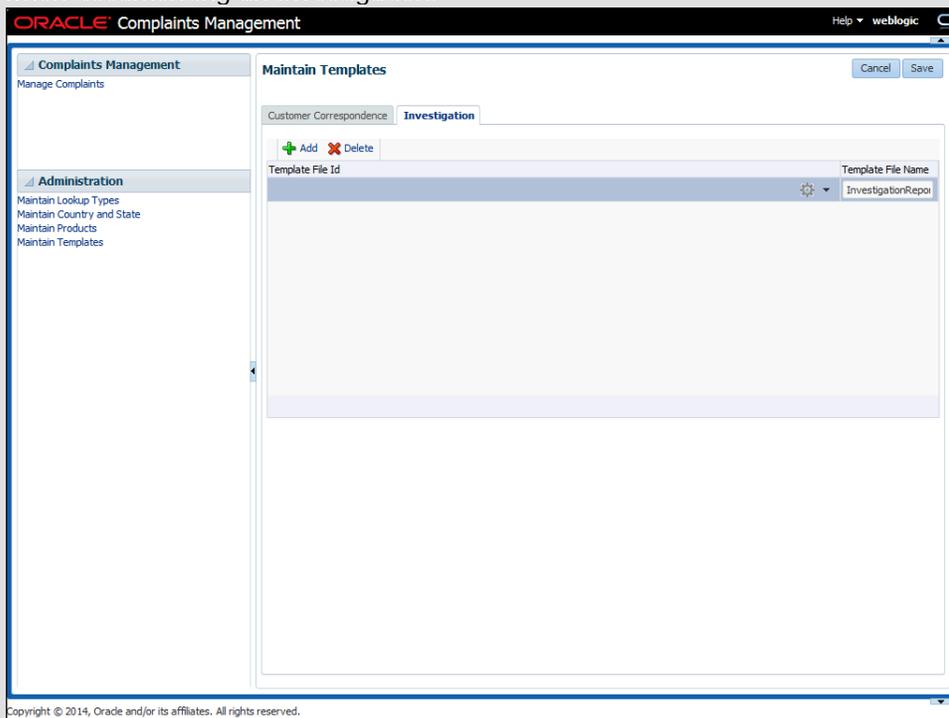
16. To delete a template:

1. Select the template you want to delete.

2. Click **Delete**, click **OK**, then click **Save**.

17. Click the **Investigation** tab.

18. Use the **Investigation** tab to add templates for the complaints investigator to utilize when documenting an investigation.



19. You modify investigation templates the same as you modified the customer correspondence templates.

20. You have completed the **Maintaining Templates** topic.

## Understanding the Complaints Management Rules Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*

- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Complaints Management uses the Complaints Management Rules and the various decision tables in the Complaints Management Rules Ruleset to determine how to process a complaint based on the status. The decision tables also determine the activities available to a user in conjunction with their role. The decision tables include conditions and actions as the rows and rules as the columns. The rules test the values of the conditions and set corresponding values for the actions. The rules must account for all possible combinations of values of all conditions in the table. A dash means "this value doesn't matter." Bucketsets and global are used to set pre-defined values for certain rules.

Upon submission of a new complaint or a subsequent complaint activity, the rules engine tests each condition. If a combination of condition values matches a rule, the corresponding actions are taken. The decision tables below provide the details for each condition, its rules, and the actions to execute. Following each table is an example scenario explaining how a complaint is processed based on a given condition for that decision table.

**CM\_Status\_Filed**

		R1
<b>Conditions</b>	ComplaintType.statusCode	FILED
<b>Actions</b>	call activateActivity	✓
	activityName:String	UpdateComplaint
	call activateActivity	✓
	activityName:String	AssignComplaintHandler
	call activateActivity	✓
	activityName:String	MaintainInvolvedParties
	call activateCustomerLoyalty	✓
	churnProbability:BigDecimal	ComplaintType:churnProbability

For example, if a complaint status is set to FILED, then the following activities are activated in the Complaint page: Update Complaint, Assign Complaint Handler, Maintain Involved Parties, and Customer Loyalty.

**CM\_Status\_Review**

		R1	R2	R3
<b>Conditions</b>	ComplaintType.statusCode	REVIEW	REVIEW	REVIEW
	StatusType.reviewStatus	INITIATED	ASSESSMENT_COMPLETED	ASSESSMENT_COMPLETED
	StatusType.investigationStatus	-	null	COMPLETED
<b>Actions</b>	call activateActivity	✓	✓	✓
	activityName:String	PerformInitialAssessment	InitiateResolution	InitiateResolution
	call activateActivity	✓	✓	
	activityName:String	CreateComplaintResponse	InitiateInvestigation	
	call activateActivity	✓		
	activityName:String	CommunicateResponse		
	call withdrawActivity		✓	
	activityName:String		PerformInitialAssessment	

For example, if a complaint status is set to REVIEW and the review status is INITIATED, then the following activities are activated in the Complaint page: Perform Initial Assessment, Create Complaint Response, and Communicate Response.

**CM\_Status\_Investigation**

		R1	R2
<b>Conditions</b>	ComplaintType.statusCode	INVESTIGATION	INVESTIGATION
	StatusType.investigationStatus	INITIATED	COMPLETED
<b>Actions</b>	call activateActivity	✓	✓
	activityName:String	InvestigateComplaint	SubmitInvestigationReport
	call withdrawActivity	✓	✓
	activityName:String	InitiateResolution	InvestigateComplaint

For example, if the complaint status is set to INVESTIGATION and the investigation is completed, then the Investigate Complaint activity is withdrawn because the investigation is completed.

**CM\_Status\_Resolution**

		R1	R2	R3
<b>Conditions</b>	ComplaintType.statusCode	RESOLUTION	RESOLUTION	RESOLUTION
	StatusType.resolutionStatus	INITIATED	RESOLUTION_ACCEPTED	RESOLUTION_NOT_ACCEPTED
<b>Actions</b>	call activateActivity	✓		✓
	activityName:String	RecordCustomerAcceptance		"ReferToArbitration"
	call withdrawActivity	✓	✓	✓
	activityName:String	InitiateInvestigation	RecordCustomerAcceptance	RecordCustomerAcceptance

For example, if the complaint status is set to RESOLUTION and the resolution status is INITIATED, then the Record Customer Acceptance activity is activated in the Complaint page.

**CM\_Status\_Arbitration**

		R1	R2
<b>Conditions</b>	ComplaintType.statusCode	ARBITRATION	ARBITRATION
	StatusType.arbitrationStatus	INITIATED	COMPLAINANT_WON; COMPLAINANT_LOST
<b>Actions</b>	call activateActivity	✓	
	activityName:String	RecordArbitrationOutcome	
	call withdrawActivity		
	activityName:String		RecordArbitrationOutcome

For example, if the complaint status is set to ARBITRATION and the arbitration status is set to INITIATED, then the Record Arbitration Outcome is activated in the Complaint page.

**CM\_Status\_Closed**

		R1
Conditions	ComplaintType.statusCode	CLOSED
Actions	call withdrawActivity	✓
	activityName:String	UpdateComplaint
	call withdrawActivity	✓
	activityName:String	“InitiateCustomerLoyaltyFollowup”
	call withdrawActivity	✓
	activityName:String	AssignComplaintHandler
	call withdrawActivity	✓
	activityName:String	PerformInitialAssessment
	call withdrawActivity	✓
	activityName:String	CreateComplaintResponse
	call withdrawActivity	✓
	activityName:String	CommunicateResponse
	call withdrawActivity	✓
	activityName:String	InitiateResolution
	call withdrawActivity	✓
	activityName:String	RecordCustomerAcceptance
	call withdrawActivity	✓
	activityName:String	CloseComplaint
	call withdrawActivity	✓
	activityName:String	InitiateInvestigation
	call withdrawActivity	✓
	activityName:String	InvestigateComplaint
	call withdrawActivity	✓
	activityName:String	SubmitInvestigationReport
	call withdrawActivity	✓
	activityName:String	ReferToArbitration
	call withdrawActivity	✓
	activityName:String	RecordArbitrationOutcome
	call withdrawActivity	✓
	activityName:String	MaintainInvolvedParties

For example, if the complaint status is set to CLOSED, then the following activities are no longer available in the Complaint page:

- Update Complaint
- Initiate Customer Loyalty Follow up
- Assign Complaint Handler
- Perform Initial Assessment
- Create Complaint Response
- Communicate Response
- Initiate Resolution
- Record Customer Acceptance
- Close Complaint
- Initiate Investigation
- Investigate Complaint
- Submit Investigation Report
- Refer to Arbitration

- Record Arbitration Outcome
- Maintain Involved Parties

**CM\_Bam\_Milestone (1 of 3)**

	R1	R2	R3	R4
<b>Conditions</b>	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED
	CaseActivityEvent.activityName "InitializeNewComplaint"	CaseActivityEvent.activityName "AssignComplaintHandler"	CaseActivityEvent.activityName "PerformInitialAssesment"	CaseActivityEvent.activityName "InitiateInvestigation"
	StatusType.reviewStatus -	StatusType.reviewStatus -	StatusType.reviewStatus ASSESSMENT_COMPLETED	StatusType.reviewStatus -
	StatusType.resolutionStatus -	StatusType.resolutionStatus -	StatusType.resolutionStatus -	StatusType.resolutionStatus -
	StatusType.arbitrationStatus -	StatusType.arbitrationStatus -	StatusType.arbitrationStatus -	StatusType.arbitrationStatus -
<b>Actions</b>	call activateActivity ✓	call activateActivity ✓	call activateActivity ✓	call activateActivity ✓
	activityName:String UpdateBAM	activityName:String UpdateBAM	activityName:String UpdateBAM	activityName:String UpdateBAM
	call reachMilestone ✓	call reachMilestone ✓	call reachMilestone ✓	call reachMilestone ✓
	milestoneName:String _4InvestigationCompleted	milestoneName:String _1ComplaintFiled	milestoneName:String _2InitialAssessmentCompleted	milestoneName:String _3InvestigationInitiated
	comments:String "Investigation Completed"	comments:String "Complaint successfully filed"	comments:String "Initial assessment of complaint completed"	comments:String "Investigation Initiated"

**CM\_Bam\_Milestone (2 of 3)**

	R5	R6	R7	R8
<b>Conditions</b>	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED
	CaseActivityEvent.activityName "SubmitInvestigationReport"	CaseActivityEvent.activityName "InitateResolution"	CaseActivityEvent.activityName "RecordCustomerAcceptance"	CaseActivityEvent.activityName "RecordCustomerAcceptance"
	StatusType.reviewStatus -	StatusType.reviewStatus -	StatusType.reviewStatus -	StatusType.reviewStatus -
	StatusType.resolutionStatus -	StatusType.resolutionStatus -	StatusType.resolutionStatus RESOLUTION_ACCEPTED	StatusType.resolutionStatus RESOLUTION_NOT_ACCEPTED
	StatusType.arbitrationStatus -	StatusType.arbitrationStatus -	StatusType.arbitrationStatus -	StatusType.arbitrationStatus -
<b>Actions</b>	call activateActivity ✓	call activateActivity ✓	call activateActivity ✓	call activateActivity ✓
	activityName:String UpdateBAM	activityName:String UpdateBAM	activityName:String UpdateBAM	activityName:String UpdateBAM
	call reachMilestone ✓	call reachMilestone ✓	call reachMilestone ✓	call reachMilestone ✓
	milestoneName:String _4InvestigationCompleted	milestoneName:String _5ResolutionInitiated	milestoneName:String _6ComplaintResolved	milestoneName:String _6ComplaintResolved
	comments:String "Investigation Completed"	comments:String "Resolution Initiated"	comments:String "Complaint Resolved"	comments:String "Complaint Resolved"

**CM\_Bam\_Milestone (3 of 3)**

	R9	R10	R11	R12
<b>Conditions</b>	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED	CaseActivityEvent:activityEvent COMPLETED
	CaseActivityEvent.activityName "ReferToArbitration"	CaseActivityEvent.activityName "RecordArbitrationOutcome"	CaseActivityEvent.activityName "CloseComplaint"	CaseActivityEvent.activityName otherwise
	StatusType.reviewStatus -	StatusType.reviewStatus -	StatusType.reviewStatus -	StatusType.reviewStatus -
	StatusType.resolutionStatus -	StatusType.resolutionStatus -	StatusType.resolutionStatus -	StatusType.resolutionStatus -
	StatusType.arbitrationStatus -	StatusType.arbitrationStatus COMPLAINANT_WON; COMPLAINANT_LOST	StatusType.arbitrationStatus -	StatusType.arbitrationStatus -
<b>Actions</b>	call activateActivity ✓	call activateActivity ✓	call activateActivity ✓	call activateActivity ✓
	activityName:String UpdateBAM	activityName:String UpdateBAM	activityName:String UpdateBAM	activityName:String UpdateBAM
	call reachMilestone ✓	call reachMilestone ✓	call reachMilestone ✓	call reachMilestone ✓
	milestoneName:String _6ComplaintResolved	milestoneName:String _6ComplaintResolved	milestoneName:String _7ComplaintClosed	milestoneName:String _7ComplaintClosed
	comments:String "Investigation Completed"	comments:String "Complaint resolved by arbitration"	comments:String "Complaint closed"	comments:String "Complaint closed"

For example, if the complaint activity Refer to Arbitration is completed, then BAM is updated.

**Understanding the Determine if Approval Required Ruleset**

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Complaints Management uses Loyalty Points and Refund in the Ruleset to Determine if Manager Approval is Required, each of which includes a condition (IF) statement and an action (THEN) statement. Globals are used to set pre-defined values for certain rules.

The Loyalty Points rule condition statement sets the following:

- There is a complaint response type and a response record1, and
- Response category is Complaint Upheld, and
- Response type is Compensation, and
- Response detail is Loyalty Points, and

- Response record1 name is Points, and
- Response record1 value is more than the Points threshold

The action statement sets the response approval flag to true.

The Refund rule condition statement sets the following:

- Response category is Complaint Upheld, and
- Response type is Compensation, and
- Response detail is Refund, and
- Response record name is Amount, and
- Response record value is more than the Amount threshold

The action statement sets the response approval flag to true.

For example, if the points threshold is set to 20000 and a complaint is upheld with 30000 loyalty points as compensation, then the approval flag is set to true. You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Complaint processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

## Understanding the Prediction Service Fallback Rules Ruleset

You must have a solid working knowledge of Oracle SOA Suite, Oracle BPM Suite, and Oracle Business Rules before modifying any business rules. For information on these products, see:

- *Oracle Fusion Middleware User's Guide for Oracle Business Rules*
- *Oracle Fusion Middleware Administrator's Guide for Oracle SOA and Oracle Business Process Management Suite*

Oracle Complaints Management by default uses the Prediction Service Fallback Rules Ruleset to determine the probability of a customer leaving due to the complaints they file. If Oracle CMPM is configured with R based predictive analytics, then the predictive model is used to determine the churn probability. If the predictive model is unavailable at the time a complaint is initialized, then the Prediction Service Fallback Rules Ruleset is used. The following explains the Prediction Service Fallback Rules Ruleset.

Oracle Complaints Management uses the Platinum Customer, Gold Customer, and Silver Customer rules in the Default Churn Ruleset, each of which includes a condition (IF) statement and an action (THEN) statement. Globals are used to set pre-defined values for certain rules.

The condition of the Platinum Customer rule specifies that the customer is platinum. The action sets the churn probability to the platinum churn global value.

The condition of the Gold Customer rule specifies that the customer is gold. The action sets churn probability to the gold churn global value.

The condition of the Silver Customer rule specifies that the customer is silver. The action sets churn probability to the silver churn global value.

To change the churn probability, change the values of the Platinum Churn, Gold Churn, and Silver Churn globals. By default, Platinum Churn is set to 80, Gold Churn at 60, and Silver Churn at 40.

For example, if a customer is a gold customer, then the churn probability is set to 60.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Complaint processing fails if this ruleset is deleted. To modify the ruleset, conditions, or actions, see "Editing Rules in an Oracle Business Rules Dictionary at Run Time," in *Oracle Fusion Middleware User's Guide for Oracle Business Rules*.

## Understanding the Oracle Complaints Management Reports

This section is for front office agents, complaints handlers, and complaints investigators reviewing reports on complaints. Use Oracle BAM Active Viewer to view the reports delivered with Oracle Complaints Management (CMPM).

You must have a solid working knowledge of Oracle Business Activity Monitoring (BAM) before creating or editing reports. For information on creating and editing Oracle BAM reports, see "Creating and Managing Reports," in *Oracle Fusion Middleware User's Guide for Oracle Business Activity Monitoring*.

Oracle Complaints Management includes two dashboards, Operational Dashboard and Trend Analysis Dashboard, with fifteen views. These views use information from the claims submitted in Oracle CMPM. Information from saved claims is not used in the views.

### Operational Dashboard

The Operational Dashboard consists of nine views. The first four are listed under the Today's Activities report. These display the number of new complaints, complaints in investigation, and complaints upheld and not upheld. The remaining views provide information on open complaints. You can click on a view to get more details. The following provides an explanation and a sample image of the views.

#### Today's Activities

##### New Complaints

The New Complaints view is a collapsed list that displays the number of new complaints filed within the day.

New Complaints
1

##### Complaints in Investigation

The Complaints in Investigation view is a collapsed list that displays the number of complaints sent for investigation within the day.

Complaints in Investigation
0

##### Complaints Upheld

The Complaints Upheld view is a collapsed list that displays the number of complaints being upheld within the day.

Complaints Upheld
1

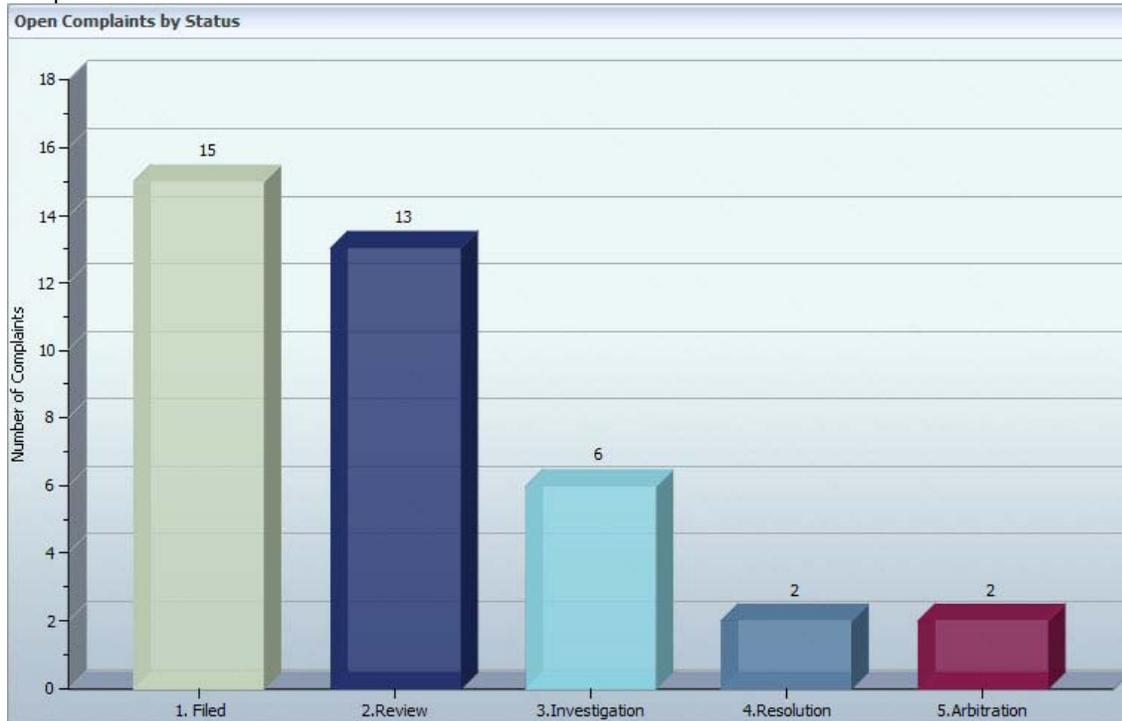
##### Complaints Not Upheld

The Complaints Not Upheld view is a collapsed list that displays the number of complaints not upheld within the day.

Complaints Not Upheld
1

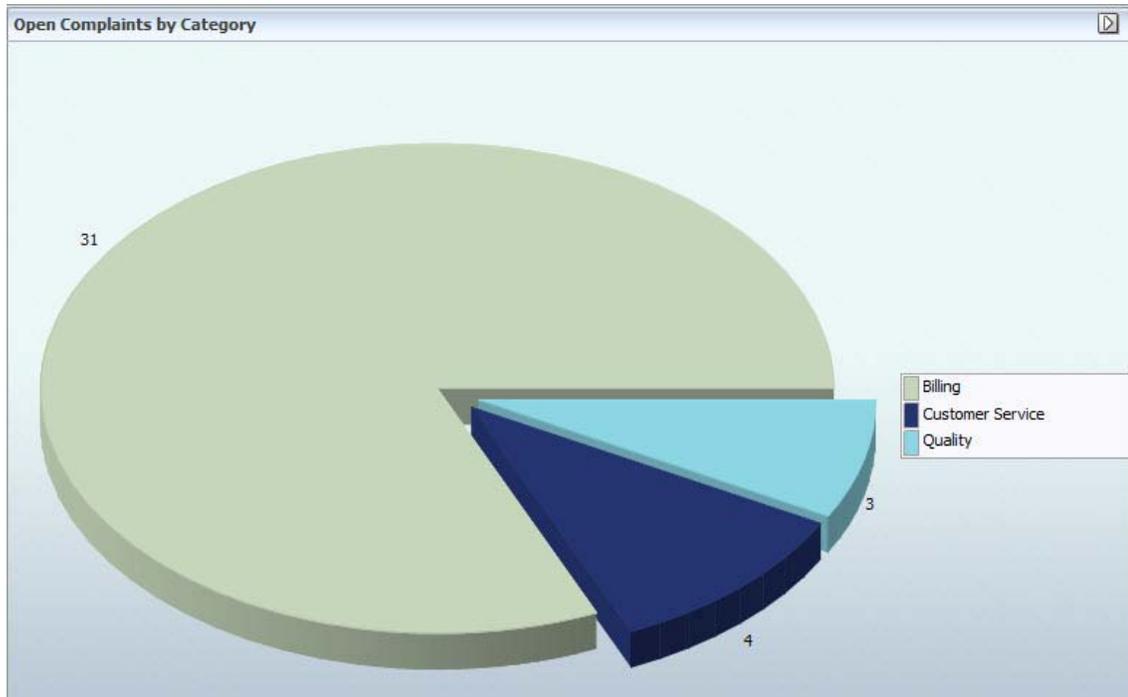
Open Complaints by Status

The Open Complaints by Status view is a 3D bar chart summarizing the number of complaints by status on the X-axis. The statuses vary based on what is set up in Oracle CPM. The total number of complaints appears on top of each bar. The Y-axis shows the total number of complaints.



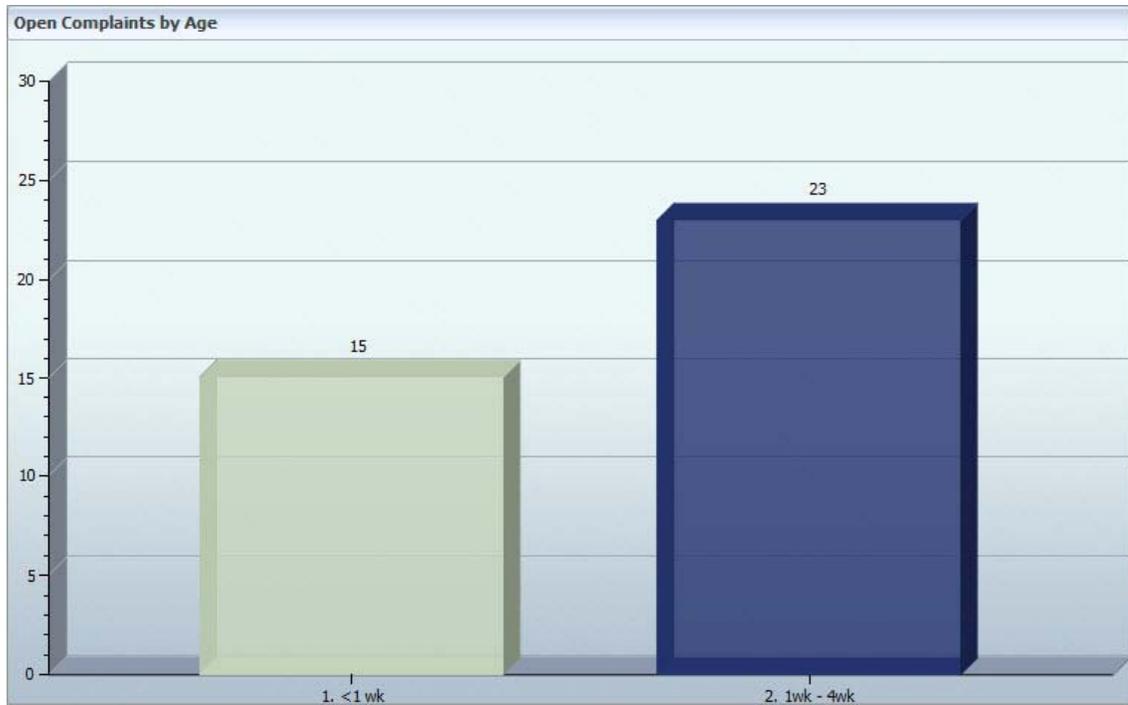
Open Complaints by Category

The Open Complaints by Category view is a 3D pie chart summarizing the number of complaints by category. The category types vary depending on what is set up in Oracle CPM. Each slice displays the number of complaints for that slice.



Open Complaints by Age

The Open Complaints by Age view is a 3D bar chart summarizing the number of complaints by age on the X-axis. The statuses are less than 1 week and 1 week to 4 weeks. The total number of complaints appears on top of each bar. The Y-axis shows the total number of complaints.



Participant Workload

The Participant Workload view is a collapsed list summarizing the total number of complaints by role. The roles are listed in the left column with a row for each role. The roles are Complaint Handler, Complaint Investigator, and Front Office Agent. The right column displays the total number of complaints for each role.

Participant Workload	
Complaint Handler	17
Complaint Investigator	6
Front Office Agent	15

**Alerts**

Alerts is an updating ordered list view that displays alert messages when a complaint has been open for more than 30 days. The left column displays the alert message. The right column specifies the date and time when the alert was received.

Alerts	
CM000064 Resolution pending 30 days or longer	4/15/2014 1:16:10 PM
CM000063 Resolution pending 30 days or longer	4/15/2014 12:36:10 PM
CM000063 Resolution pending 30 days or longer	4/15/2014 12:36:10 PM
CM000063 Resolution pending 30 days or longer	4/15/2014 12:36:10 PM
CM000063 Resolution pending 30 days or longer	4/15/2014 12:36:10 PM
CM000063 Resolution pending 30 days or longer	4/15/2014 12:36:10 PM
CM000063 Resolution pending 30 days or longer	4/15/2014 12:36:10 PM
CM000053 Resolution pending 30 days or longer	4/15/2014 3:33:10 AM
CM000043 Resolution pending 30 days or longer	4/15/2014 3:16:10 AM
CM000041 Resolution pending 30 days or longer	4/15/2014 12:54:10 AM
CM000040 Resolution pending 30 days or longer	4/14/2014 11:48:10 PM

**Trend Analysis Dashboard**

The Trend Analysis Dashboard consists of five views pertaining to the historical analysis of processed complaints. You can filter the views using the Category and Period parameters. The following provides an explanation and a sample image of the views.

Average Processing Time

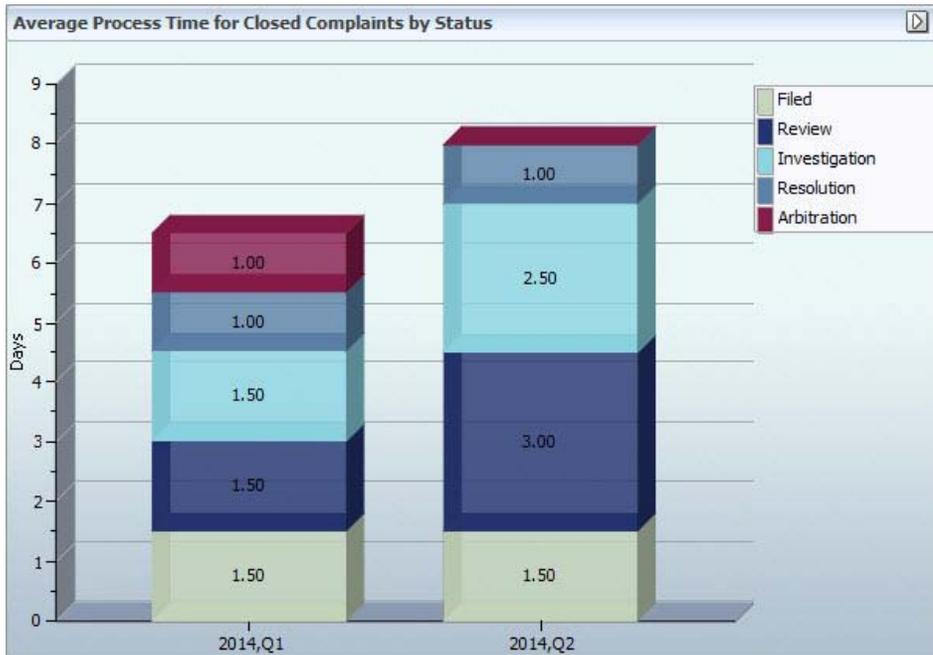
The Average Processing Time view is a 3D bar chart summarizing the average time it takes to process a complaint. This view only accounts for complaints with a Closed status. The X-axis displays the time period by year and quarter. The average processing time is displayed on the top of the bar. The Y-axis displays the number of days to process the complaint.



Average Process Time for Closed Complaints by Status

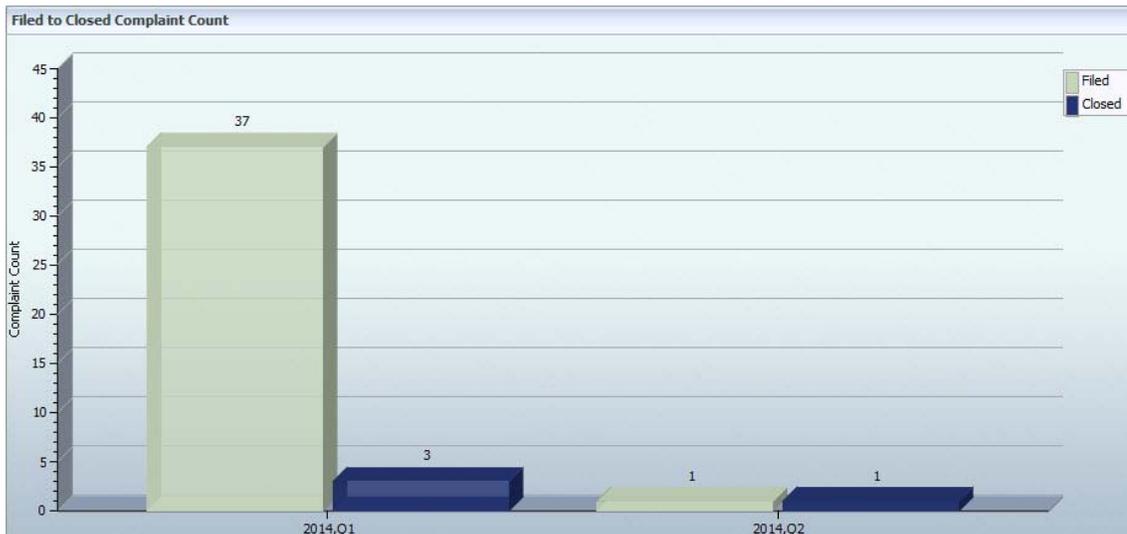
The Average Process Time for Closed Complaints by Status view is a 3D stacked bar chart summarizing the average time it took to process complaints through the five statuses. This view only accounts for complaints with a Closed status. The X-axis displays the time period by year and quarter for the five statuses. The statuses are: Filed, Review, Investigation,

Resolution, and Arbitration. Each status has a label that shows the average number of days it took to process that status. The Y-axis displays the number of days it took for the complaint to move through each status. You can click the arrow in the title bar to drill down to a monthly or weekly view.



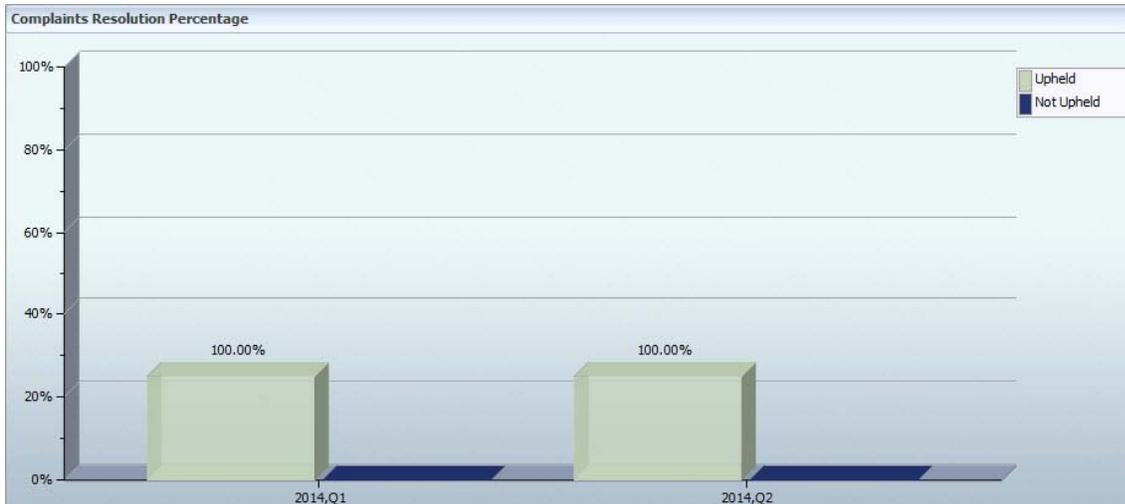
Filed to Closed Complaint Count

The Filed to Closed Complaint Count view is a 3D bar chart summarizing the number of filed and closed complaints. The X-axis displays the time period by year and quarter for filed and closed complaints. The Y-axis displays the number of complaints.



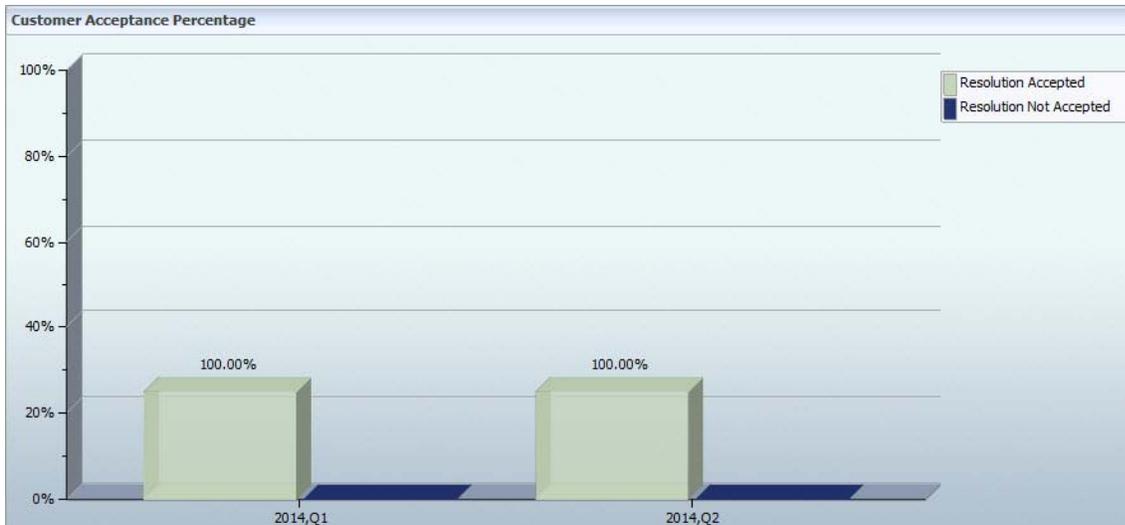
Complaints Resolution Percentage

The Complaints Resolution Percentage view is a 3D bar chart summarizing the resolution percentage for Upheld and Not Upheld complaints. This view only accounts for complaints with a Closed status. The X-axis displays the time period by year and quarter for Upheld and Not Upheld complaints. The Y-axis displays the percentage of complaints.



Customer Acceptance Percentage

The Customer Acceptance Percentage view is a 3D bar chart summarizing the percentage for customer acceptance or non acceptance of the resolution. This view only accounts for complaints with a Closed status. The X-axis displays the time period by year and quarter for Resolution Accepted and Resolution Not Accepted. The Y-axis displays the percentage of customers.



## Delivered Documentation

This section provides a complete list of delivered documentation for Oracle Complaints Management (CMPM).

The delivered documents are:

**Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators** - This content provides instructions for installing any Oracle Process Accelerator.

**Oracle Process Accelerators Known Issues** - This content provides information about the known issues with any Oracle Process Accelerator.

**Oracle Fusion Middleware User's Guide for Oracle Complaints Management Process Accelerator** - This content provides information on how to use and modify Oracle Complaints Management Process Accelerator. The content of this manual is also available in the following formats:

- Process Accelerator Help system
- User Productivity Kit (UPK) demo
- UPK source content

**Process Accelerator Help System** - The Help system is available when you launch the  or the **User Productivity Kit** link from the process accelerator Help menu.

**UPK Demo** - You can use the User Productivity Kit demo for training or presentation purposes while installing the process accelerator. To utilize the UPK demo, unzip the **PA acronymUPK.zip** file and distribute the PlayerPackage directory and its contents to those who need training; or place the PlayerPackage directory and its contents on a web server and provide the URL to its location. The **play.exe** file launches the UPK Player.

**UPK Source Content** - If you have a licensed version of Oracle User Productivity Kit you can modify the UPK content using the **UPKSource.zip** file. Use the following steps to deploy your modified UPK content as the Help for the Process Accelerator.

1. Unzip **UPKsource.zip**.
2. In UPK Developer, import the **PA acronymUPKsrc.odarc** file you want to modify.
3. Modify and publish your updated content to the Player.
4. Rename the **PlayerPackage** directory to **PA acronymUPK**.
5. Convert the **PA acronymUPK** directory and its contents into a web application archive (war) file called **PA acronymUPK.war**.
6. On your Oracle WebLogic Server, navigate to `$PA_HOME/pa/src/PA acronym/UPKObjects`, rename **PA acronymUPK.war** to **PA acronymUPK.warORIG**.
7. Copy your new **PA acronymUPK.war** to `$PA_HOME/pa/src/PA acronym/UPKObjects`.
8. Navigate to `$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/PA acronymUPK/app`, rename **PA acronymUPK.war** to **PA acronymUPK.warORIG**.
9. Copy your new **PA acronymUPK.war** to `$MW_HOME/user_projects/domains/soainfra/servers/AdminServer/upload/PA acronymUPK/app`.
10. In Oracle WebLogic Server Administration Console, navigate to the **Domain Structure** navigation tree, click **Deployments**.
11. On the Summary of Deployments page, select the **PA acronymUPK** check box, and click **Update**.
12. On the Update Application Assistant page, change the **Source Path** to the location you extracted the **PA acronymUPK.war** file to.
13. Click **Next**, **Next**, then **Finish**.

14. Launch the Process Accelerator Help to view the updated documentation.