

**Oracle® Fusion Middleware**  
User's Guide for Oracle Internal Service  
Request Process Accelerator 11gRelease 1  
(11.1.1.7.2)

June 2014

**ORACLE®**

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# Oracle Internal Service Request Process Accelerator

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

## Audience

This document is intended for:

- Employees who use Oracle Internal Service Request to submit service requests
- Employees who use Oracle Internal Service Request to fulfill service requests
- Managers who use Oracle Internal Service Request to disposition service requests
- Administrators who maintain Oracle Internal Service Request seeded data, business rules, and reports

Within this guide, the term *disposition* means a manager's ability to approve, reject, or request a change to an employee's submitted service request.

## Related Documents

For more information, see the following Oracle resources:

Oracle Internal Service Request Process Accelerator

- *Oracle Fusion Middleware Installation Guide for Oracle Process Accelerators*
- *Oracle Fusion Middleware Extensibility 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 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 you supply particular values.

## What's New in This Guide for Release 11.1.1.7.2

For Release 11.1.1.7.2, this guide has been updated in several ways. The What's New table depicts the sections or topics that have been added or changed.

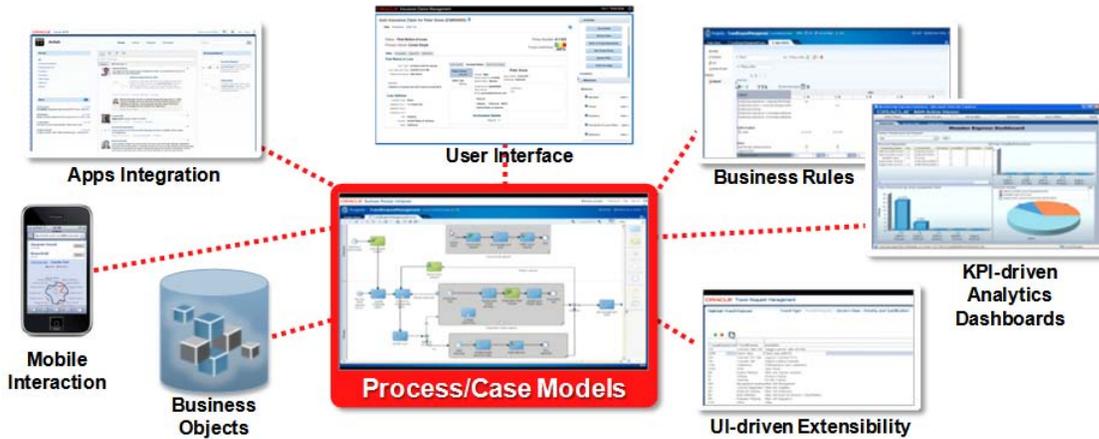
### What's New

<b>Sections / Topics</b>	<b>Changes Made</b>
<b>Overview of the Oracle Internal Service Request Process Lifecycle</b>	Section updated to document the changes to the business process model.
<b>Dispositioning an Internal Service Request</b>	Section updated to document the approval required for capital expenditure service requests.
<b>Maintaining Service Types</b>	Section updated to document the subtypes and the new service types.
<b>Understanding the Additional Approvals Decision Ruleset</b>	Section added to document the approval process for capital expenditures.

## Overview of Oracle Process Accelerators

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 Internal Service Request

This section is for new Oracle Internal Service Request (ISR) users who want a brief introduction.

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

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

### Overview of the Oracle Internal Service Request Process Lifecycle

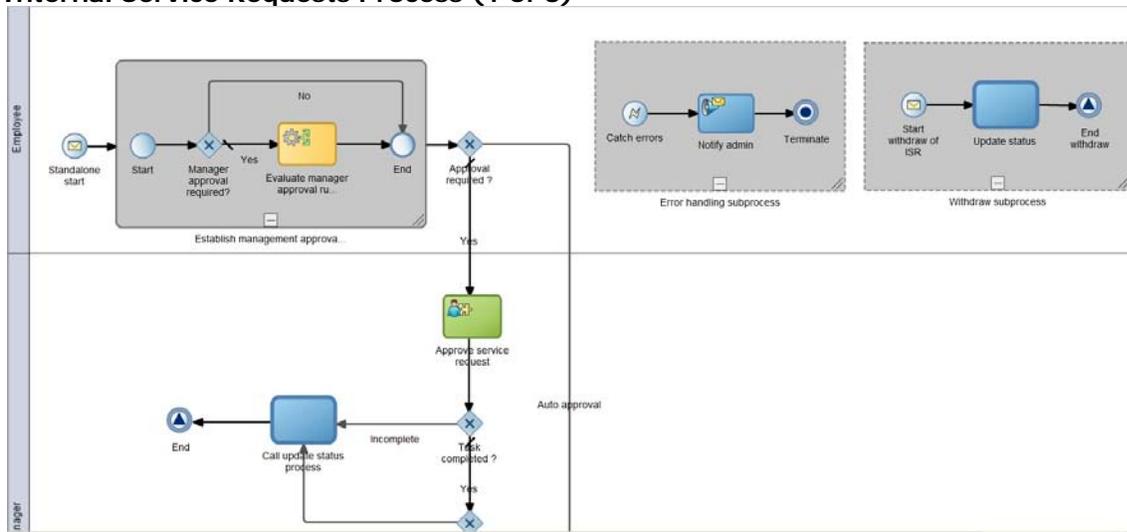
Oracle Internal Service Request (ISR) Process Accelerator is a process solution that enables organizations to submit, approve, track, and fulfill service requests. Oracle ISR provides dashboards to view process analytics and service request summary reports. Administrators can modify the business rules and seeded data.

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

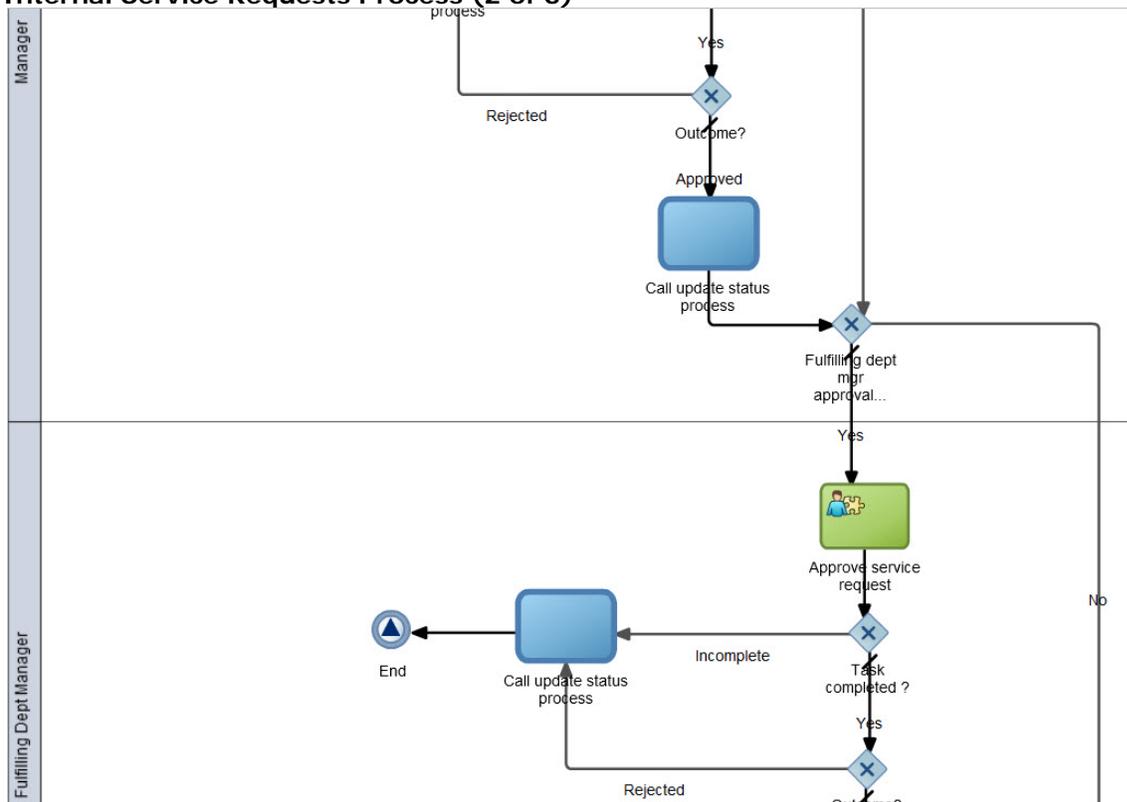
- The submitting employee submits a new service request.
- The fulfilling employee fulfills and closes the request.
- The submitting employee manager dispositions the request.
- The fulfilling department manager dispositions the request.
- The software systems manager dispositions software requests provided departmental processing is implemented.
- The IT infrastructure manager dispositions hardware requests provided departmental processing is implemented.
- The CFO dispositions capital expenditure requests provided departmental processing is implemented.
- The accounting manager dispositions financial requests provided departmental processing is implemented.
- The controller dispositions capital expenditure requests provided departmental processing is implemented.

The Internal Service Request Process is the main business process for Oracle ISR, and the focus of this topic. The Internal Service Request Process diagrams are depicted as follows, with an explanation of the process.

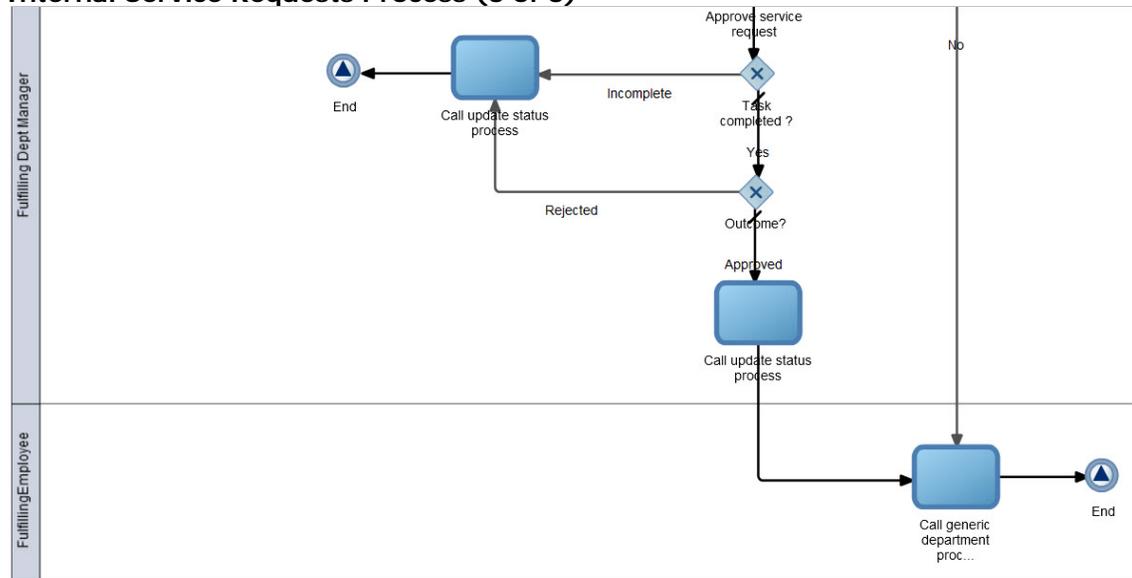
Internal Service Requests Process (1 of 3)



Internal Service Requests Process (2 of 3)



**Internal Service Requests Process (3 of 3)**



The Internal Service Request Process involves the following basic tasks:

1. An employee or delegate creates and submits a service request.
2. The service request is routed to the employee's manager and the fulfilling department manager to carry out the Approve Service Request task. Either manager can approve, reject, or request a change to a service request. If multiple approval levels are required, the process cycles through them until the final disposition. If department processing is implemented, then the service request is routed to the corresponding departmental manager for dispositioning, after the employee manager and fulfilling department manager approvals are complete.
3. The Approve Service Request task updates the service request's status and sends a notification to the submitting employee indicating approval or rejection.
4. If the request is approved, the service request is routed to the fulfilling employee to carry out the Fulfill Service Request and Close Service Request tasks.

Some actions of Oracle ISR are automated and are not depicted in the descriptive model shown previously. Business rules define whether a request is automatically approved and how many levels of management are required to finalize approval.

This topic walks through the Oracle Internal Service Request Process illustrating how an employee submits or fulfills a service request and how a manager approves the service request.

**Overview of the Oracle Internal Service Request Process Lifecycle**

1. The employee begins by navigating to the **Submit Service Request** page.
2. The employee uses the **Submit Service Request** page to create and submit a service request.
3. The employee completes all required fields pertaining to her request.
4. The employee clicks the **Submit** button to save and submit the service request to her manager.
5. The submitting employee and manager receive an email notification of the submitted service request.

This is an example email notification.

subject **Action Required:Approve Service Request ISR000142**

Task Approve Service Request ISR000142 requires your attention.  
Access this task in the [Workspace Application](#)

**Contents**

Service Request ID	ISR000142
Submitter	cdoyle2
Submit Date	5/30/2012
Priority	3
Due Date	6/4/2012
Department	IT Department
Service Type	Hardware Request
Service Subtype	Printer
Reason	Writing extensive reports for the legal department.
Fulfilling Dept Manager UID/Role	Robert Stevenson
Fulfilling Employee UID/Role	Conan Doyle

**Comments**

No data to display

6. The employee's manager and the fulfilling department manager use the **My Tasks** page to disposition service requests.
7. The manager double-clicks on the **Task** to open the service request.
8. The manager reviews the service request and clicks the **Approve** button to approve the service request.

The employee and manager receive an email notification of the disposition of the service request.

9. The fulfilling employee uses the **My Tasks** page to review service requests.
10. The fulfilling employee double-clicks on the **Task** to open the service request.
11. The fulfilling employee completes the **Estimated Fulfillment Date** and **Fulfillment Status** fields. The **Estimated Fulfillment Date** is optional.
12. The fulfilling employee reviews the service request and clicks the **Ready for Fulfillment** button to indicate that the service request can be fulfilled.

The submitting employee receives an email notification of the review of the service request.

13. The fulfilling employee uses the **My Tasks** page to close service requests.
14. The fulfilling employee double-clicks on the **Task** to open the service request.
15. The fulfilling employee completes the **Fulfillment Status** and **Close Date** fields.
16. The fulfilling employee clicks the **Close Request** button to close the service request.

The submitting employee receives an email notification of the closing of the service

request.

17. You have completed the **Overview of the Oracle Internal Service Request Process Lifecycle** topic.

## Understanding the Oracle Internal Service Request Pages

You navigate Oracle Internal Service Request (ISR) through the Oracle Business Process Management Workspace. Your role within Oracle ISR 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 ISR. Understanding the pages associated to a task or role makes you more effective in your use with Oracle ISR.

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

### *Understanding the Oracle Internal Service Request Pages*

1. The Oracle Business Process Workspace **Tasks** tab 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 service request by executing the tasks assigned to you from **Views, My Tasks**
- Access Oracle ISR from the **Applications** link

2. The **Submit Service Request** link is visible if you are granted permissions in Oracle ISR. Use this link to access the **Submit Service Request** page. This is an Oracle Business Process Management Workspace page.
3. Use the **Submit Service Request** page to create a service request. This is an Oracle Internal Service Request page.
4. The **Maintain Service Data** link is available under **Links** if you have administrator rights in Oracle ISR. Use this link to access the administration pages.
5. Use the **Maintain Fulfillment Status** page to modify the fulfillment status codes made available when reviewing or closing a service request. This is an Oracle Internal Service Request administration page.
6. Use the **Maintain Service Types** page to modify the service types made available when creating a service request. This is an Oracle Internal Service Request administration page.
7. The Oracle Business Process Workspace **My Tasks** page displays the revision requests an employee receives from their manager when logged in with an employee role.  
  
The **My Tasks** page displays the service requests a manager needs to disposition when logged in with a manager role. This is an Oracle Business Process Management Workspace page.
8. For more information on how to work with tasks, such as reassigning a task, routing a task, or setting a vacation period, see "Working on Tasks in Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.
9. For more information on understanding, navigating, and setting your preferences in Oracle Business Process Workspace, see "Getting Started with Process Workspace," in *Oracle Fusion Middleware User's Guide for Oracle Business Process Management*.

10. You have completed the **Understanding the Oracle Internal Service Request Pages** topic.

## Starting Oracle Internal Service Request

You need a valid Oracle Business Process Management Workspace URL, user ID, and password to access Oracle Internal Service Request (ISR). 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 ISR.

### ***Procedure: Starting Oracle Internal Service Request***

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. Click the **Applications** link to access any Oracle Process Accelerator, implemented by your organization and that you have permissions to.
5. Use the **Submit Service Request** link to access Oracle Internal Service Request.
6. You have completed the **Starting Oracle Internal Service Request** topic.

## Using Oracle Internal Service Request

This section is for employees who submit or fulfill service requests and managers who disposition service requests.

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

- Create a new service request.
- Withdraw a service request.
- Disposition a service request.
- Submit more information for a service request.
- Review a service request.
- Close a service request.

### Creating a New Internal Service Request

Imagine you have extensive reports to write and need your own printer. You can use Oracle Internal Service Request to submit a service request to your manager, requesting approval for the printer.

In this topic, you will create and submit a new service request.

#### **Procedure: Creating a New Internal Service Request**

1. Begin by navigating to the **Submit Service Request** page.

Click the **Submit Service Request** link.

2. Use the **Submit Service Request** page to create and submit a service request.

The screenshot displays the 'Submit Service Request' web form. At the top right, there are 'Actions' and 'Submit' buttons. The form is divided into several sections:

- Request Details:** Contains pre-filled and user-input fields: Service Request ID (ISR000001), Status (New), Submitter (Jones), Submit Date (5/13/2013), Priority (3), Department (dropdown menu), Service Type (dropdown menu), Service Subtype (dropdown menu), Due Date (calendar icon), and Reason (text area).
- Organization:** Contains input fields for Organization, Telephone Number, Extension, Building, and Room.
- Comments:** A section with a 'No data to display' message and a plus icon for adding comments.
- History:** A section with a plus icon for viewing the request history.

3. The **Service Request ID**, **Status**, **Submitter**, and **Submit Date** fields automatically

populate when the **Submit Service Request** page opens.

4. The **Priority** field automatically populates when the **Submit Service Request** page opens. By default, the priority level is set to 3. You can change this value if you require a different priority. Values range from 1 to 5, highest to lowest.
5. The **Department**, the **Service Type**, and the **Service Subtype** together define the service you select.

**Note:** All fields with an **Asterisk (\*)** are required.

6. Click the **Department** list.
  7. Click the **IT Department** list item.
  8. Click the **Service Type** list.
  9. Click the **Hardware Request** list item.
  10. Click the **Service Subtype** list.
  11. Click the **Printer** list item.
  12. The **Due Date** field automatically populates when you select the **Service Subtype**. It is calculated based on the lead time defined in the subtype. You can change this value if you require a different due date.
  13. Click in the **Reason** field.
  14. Enter the desired information into the **Reason** field. Enter "**Writing extensive reports for the legal department.**".
  15. Complete the **Organization**, **Telephone Number**, **Extension**, **Building**, and **Room** fields if required by your organization.
  16. Use the **Submit** button to save and submit the service request to your manager for approval.
- Click the **Submit** button.
17. After you submit a service request you and your manager receive an email notification of the service request.

You also receive an email notification after your manager dispositions your service request.

This is an example of an email notification.

subject **Action Required:Approve Service Request ISR000142**

Task Approve Service Request ISR000142 requires your attention.  
Access this task in the [Workspace Application](#)

**Contents**

Service Request ID	ISR000142
Submitter	cdoyle2
Submit Date	5/30/2012
Priority	3
Due Date	6/4/2012
Department	IT Department
Service Type	Hardware Request
Service Subtype	Printer
Reason	Writing extensive reports for the legal department.
Fulfilling Dept Manager UID/Role	Robert Stevenson
Fulfilling Employee UID/Role	Conan Doyle

**Comments**

No data to display

18. You have completed the **Creating a New Internal Service Request** topic.

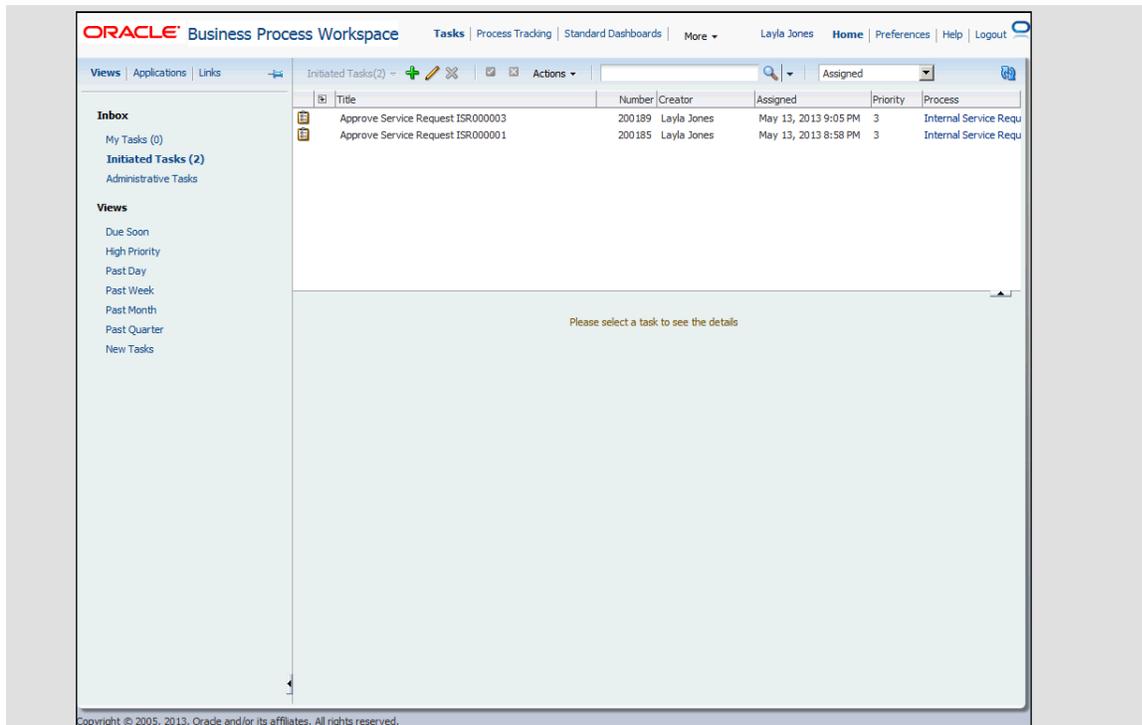
## Withdrawing an Internal Service Request

A service request can be withdrawn if the requirement is no longer needed, such as a request for a new credit card if the old one is found. Service requests can be withdrawn after submission, prior to approval, or after approval.

In this topic, you will withdraw a service request.

### ***Procedure: Withdrawing an Internal Service Request***

1. Begin by navigating to the **Initiated Tasks** page.  
Click the **Initiated Tasks** link.
2. Use the **Initiated Tasks** page to view and take action on submitted service requests.



3. Select the service request task you want to withdraw.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will click the task.

Click the **Task** object.

4. Click the **Actions** menu.
5. Click the **Withdraw** menu.
6. After you withdraw a service request it disappears from your **My Tasks** list.

An email notification is sent to approvers who have not already dispositioned the request.

7. You have completed the **Withdrawing an Internal Service Request** topic.

## Dispositioning an Internal Service Request

You log into Oracle Business Process Management Workspace and disposition a service request by approving, rejecting, or requesting more information about a service request. Regular service requests require dispositioning from the employee manager, fulfilling department manager, and the department manager. Capital expenditure service requests require dispositioning from the aforementioned roles along with the additional roles like the CFO and controller.

In this topic, you will disposition a service request.

### ***Procedure: Dispositioning an Internal Service Request***

1. You receive an email notification when you have service requests to disposition.

This is an example of an email notification.

subject **Action Required:Approve Service Request ISR000142**

Task Approve Service Request ISR000142 requires your attention.  
 Access this task in the [Workspace Application](#)

**Contents**

Service Request ID ISR000142  
 Submitter cdoyl2  
 Submit Date 5/30/2012  
 Priority 3  
 Due Date 6/4/2012  
 Department IT Department  
 Service Type Hardware Request  
 Service Subtype Printer  
 Reason Writing extensive reports for the legal department.  
 Fulfilling Dept Manager UID/Role Robert Stevenson  
 Fulfilling Employee UID/Role Conan Doyle

**Comments**  
 No data to display

2. Use the **My Tasks** page to view all service requests you have to disposition.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.

ORACLE Business Process Workspace

Tasks | Process Tracking | Standard Dashboards | More ▾ | Eli Wong | Home | Preferences | Help | Logout

Views | Applications | Links | My Task(1) | Actions ▾ | Me & My Group | Assigned ▾

Title	Number	Creator	Assigned	Priority	Process
Approve Service Request ISR000001	200185	Layla Jones	May 13, 2013 8:58 PM	3	Internal Service Requ

Please select a task to see the details

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3. Select the service request task you want to disposition.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

- Use the **Approve Service Request** page to review and disposition the service request.

The screenshot shows the 'Approve Service Request' interface for request ID ISR000001. At the top right, there are 'Approve' and 'Reject' buttons. The main content is divided into three sections:

- Request Details:**
  - Service Request ID: ISR000001
  - Status: Submitted
  - Submitter: I Jones
  - Submit Date: 5/13/2013
  - Priority: 3
  - Department: IT Department
  - Service Type: Hardware Request
  - Service Subtype: Printer
  - Due Date: 5/18/2013
  - Reason: Writing extensive reports for the legal department.
  - Organization, Telephone Number, Extension, Building, Room (fields are present but empty).
- Review Details:**
  - Fulfilling Department Manager: Scott Fitzgerald
  - Fulfilling Employee: Jack London
- Comments:**
  - Field label: Comments
  - Content: No data to display
- History:**
  - Field label: History
  - Content: (Empty)

- You are going to disposition this service request by asking for more information.

Click the **Actions** menu.

- Click the **Request Information...** menu.

- Use the **Request More Information** dialog box to ask for additional details from specific participants.

- Use the **From** options to specify one of the task participants or other users. The **Participant** option automatically populates with the submitting employee.

You are going to ask the submitting employee for more information.

- Click in the **Comments** field.

- Enter the desired information into the **Comments** field. Enter "**Which department is billed, finance or legal?**".

- Use one of the **Return Options** to specify how the information request is routed.

The **Require subsequent participants to retake action** option is automatically selected.

Use the **Require subsequent participants to retake action** option to send the information request back to the approvers for reapproval. Use the **Route directly back to me** option to route the service request back to your queue after the information is provided.

- Click the **Route directly back to me** option.

13. Click the **OK** button.
14. After you disposition a service request, it disappears from your task list.
15. You have completed the **Dispositioning an Internal Service Request** topic.

## Submitting Information for an Internal Service Request

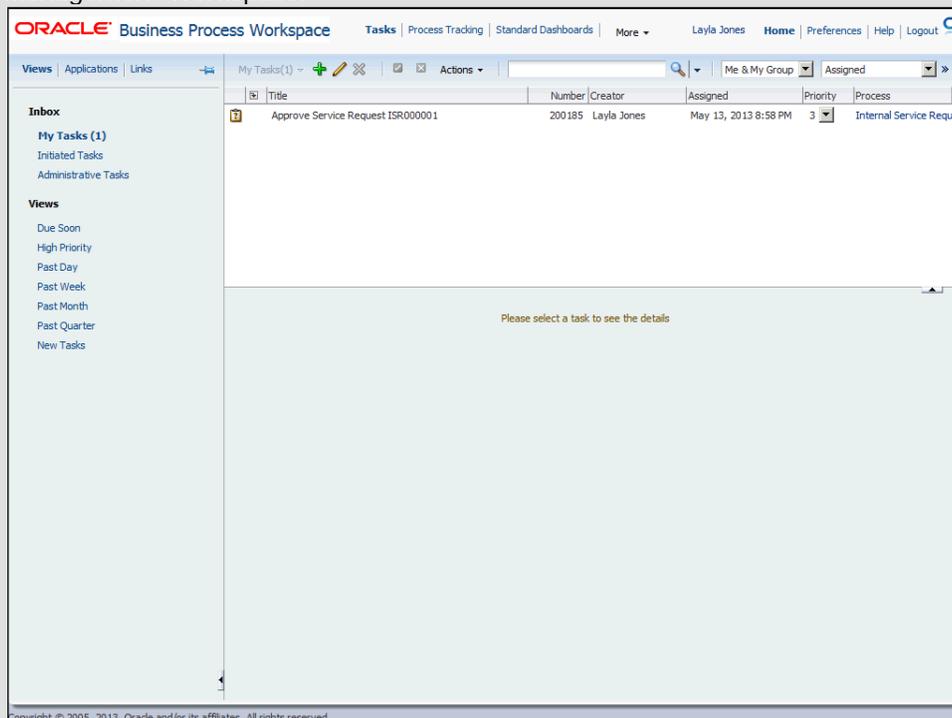
If one of the managers who dispositions a service request asks for more information, the service request is routed to the person from whom the information is needed. This could be the employee who initiated the request, one of the managers who previously approved it, or another person in the company.

In this topic, you will submit more information for a service request.

### Procedure: Submitting Information for an Internal Service Request

1. Use the **My Tasks** page to view service requests for which you have to provide information.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



2. Select the service request task for which you are providing information.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

3. Use the **Approve Service Request** page to submit information for the service request.

The screenshot displays the 'Approve Service Request' interface for request ID ISR000001. The 'Request Details' section includes fields for Service Request ID, Status (Submitted), Submitter (Jones), Submit Date (5/13/2013), Priority (3), Department (IT Department), Service Type (Hardware Request), Service Subtype (Printer), Due Date (5/18/2013), and Reason (Writing extensive reports for the legal department). The 'Review Details' section shows the Fulfilling Department Manager (Scott Fitzgerald) and Fulfilling Employee (Jack London). The 'Comments' section contains a comment from 'ewong' dated May 15, 2013, 11:17 AM, asking 'Which department is billed, finance or legal?'. The 'History' section is currently empty.

4. A comment is required when submitting information for a service request.

Click the **Create** button.

5. Click in the **Comment** field.
6. Enter the desired information into the **Comment** field. Enter "**Bill the finance department.**".
7. Specify who should see the comments by selecting the appropriate option.

The default option, **All process participants**, allows the submitting employee, the fulfilling employee, and all approvers to view the comment.

The **Only task participants** option allows only the requestor and provider to view the comment. In this example, use the **Only task participants** option.

Click the **Only task participants** option.

8. Click the **OK** button.
9. Click the **Actions** menu.
10. Click the **Submit Information** menu.
11. After you provide more information for a service request it disappears from your task list.
12. You have completed the **Submitting Information for an Internal Service Request** topic.

## Reviewing an Internal Service Request

After the appropriate personnel disposition a service request, you, as the employee in charge of fulfilling the request, receive an email notification asking you to review the request. You review the request and provide fulfillment status information.

Fulfilling the request is a manual step, performed outside of Oracle Internal Service Request.

In this topic, you will review a service request.

### **Procedure: Reviewing an Internal Service Request**

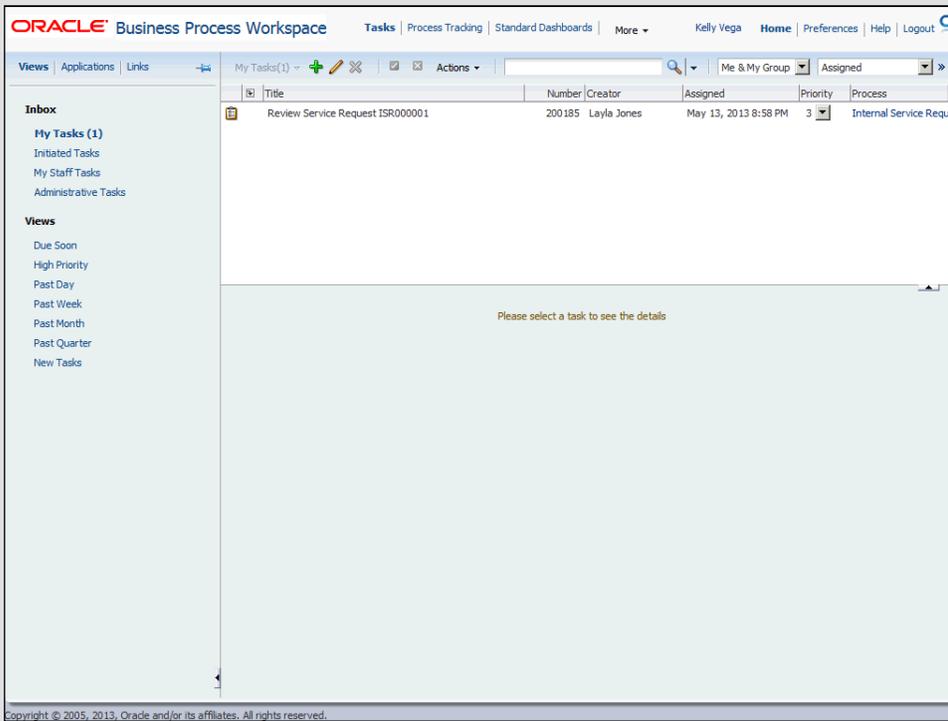
1. You receive an email notification when you have service requests to review.

This is an example of an email notification.



2. Use the **My Tasks** page to view all service requests you have to review.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.

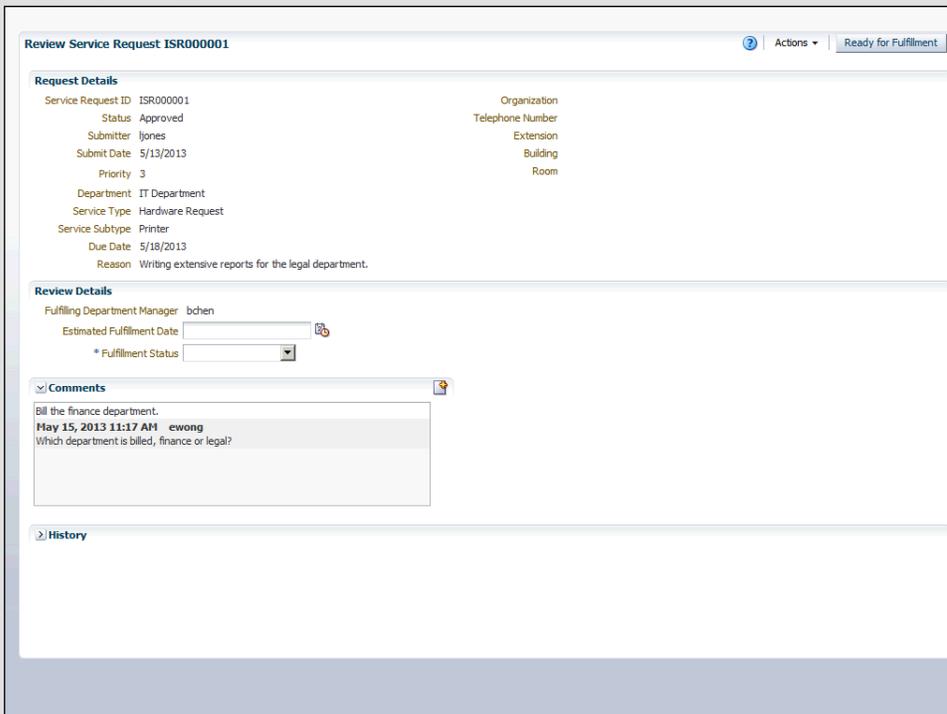


3. Select the service request task you want to review.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

4. Use the **Review Service Request** page to review the service request and complete the fulfillment details.



5. Click in the **Estimated Fulfillment Date** field.
6. Enter the desired information into the **Estimated Fulfillment Date** field. Enter **"05/17/2013"**.
7. Click the **Fulfillment Status** list.
8. Click the **In Process** list item.
9. Click the **Ready for Fulfillment** button.
10. After you review a service request, it reappears on your task list as a service request to close.
11. You have completed the **Reviewing an Internal Service Request** topic.

## Closing an Internal Service Request

After you, as the employee in charge of fulfilling the service request, fulfill it or determine that it cannot be fulfilled, you log into Oracle Business Process Management Workspace and close the service request.

In this topic, you will close a service request.

### **Procedure: Closing an Internal Service Request**

1. You receive an email notification when you have service requests to close.

This is an example of an email notification.

**subject** Action Required:Close Service Request ISR000142

Task Close Service Request ISR000142 requires your attention.  
Access this task in the [Workspace Application](#)

**Contents**

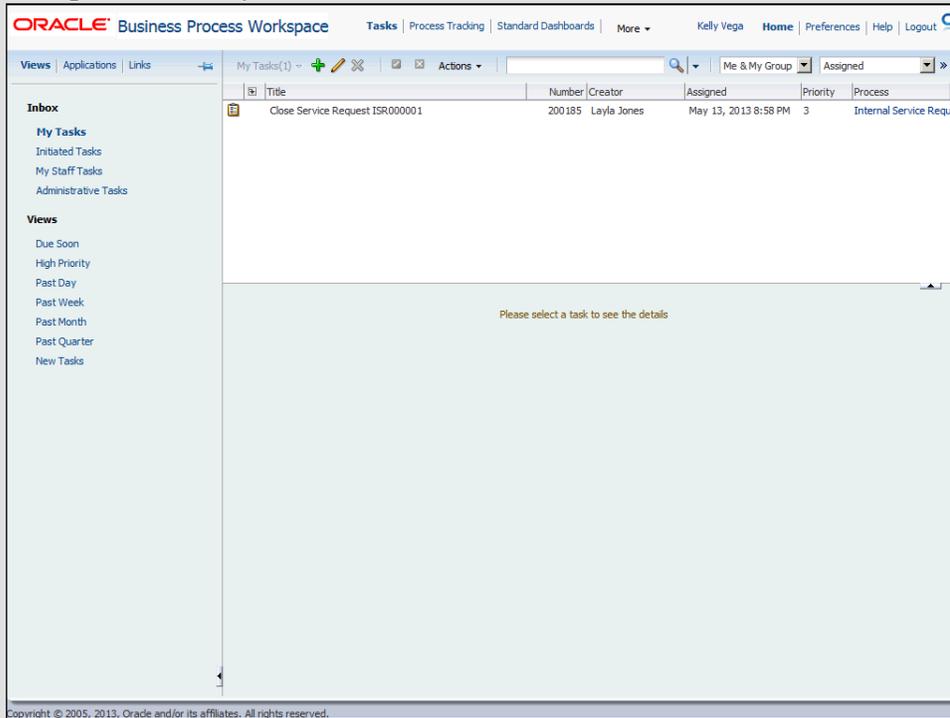
Service Request ID	ISR000142
Submitter	cdoyle2
Submit Date	5/30/2012
Priority	3
Due Date	6/4/2012
Department	IT Department
Service Type	Hardware Request
Service Subtype	Printer
Reason	Writing extensive reports for the legal department.
Fulfilling Dept Manager UID/Role	Robert Stevenson
Fulfilling Employee UID/Role	Conan Doyle
Fulfillment Status	In Process
Estimated Fulfillment Date	6/15/2012
Close Date	

**Comments**

No data to display

2. Use the **My Tasks** page to view all service requests you have to close.

The **My Tasks** page automatically opens after you log into Oracle Business Process Management Workspace.



3. Select the service request task you want to close.

Click on the task to open it in the **Task Details** section. Double-click the task to open in a new window. In this example, you will double-click the task.

Double-click the **Task** object.

4. Use the **Close Service Request** page to close the service request.

Close Service Request ISR000001 Actions Close Request

**Request Details**

Service Request ID	ISR000001	Organization	
Status	Ready for Fulfillment	Telephone Number	
Submitter	Ijones	Extension	
Submit Date	5/13/2013	Building	
Priority	3	Room	
Department	IT Department		
Service Type	Hardware Request		
Service Subtype	Printer		
Due Date	5/18/2013		
Reason	Writing extensive reports for the legal department.		

**Review Details**

Fulfilling Department Manager: Scott Fitzgerald  
Fulfilling Employee: Jack London  
\* Fulfillment Status:   
\* Close Date: 5/18/2013

**Comments**

Bill the finance department.  
May 15, 2013 11:17 AM ewong  
Which department is billed, finance or legal?

**History**

5. Click the **Fulfillment Status** list.
6. Click the **Fulfilled, Closed** list item.
7. **Close Date** defaults to today's date. You can change it if necessary.
8. Click the **Close Request** button.
9. All task participants receive an email notification when a service request is closed.

This is an example of an email notification.

subject **Submitted:Close Service Request ISR000142**

Task Close Service Request ISR000142 requires your attention.  
Access this task in the [Workspace Application](#)

**Contents**

Service Request ID	ISR000142
Submitter	cdoyle2
Submit Date	5/30/2012
Priority	3
Due Date	6/4/2012
Department	IT Department
Service Type	Hardware Request
Service Subtype	Printer
Reason	Writing extensive reports for the legal department.
Fulfilling Dept Manager UID/Role	Robert Stevenson
Fulfilling Employee UID/Role	Conan Doyle
Fulfillment Status	Fulfilled, Closed
Estimated Fulfillment Date	6/15/2012
Close Date	6/5/2012

**Comments**

No data to display

10. After you close a service request it disappears from your task list.

11. You have completed the **Closing an Internal Service Request** topic.

## Administering Oracle Internal Service Request

This section is for administrators who maintain Oracle Internal Service Request (ISR). Use Oracle ISR 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 service type options.
- Maintain fulfillment status options.
- Describe the business rules.

### Maintaining Service Types

Service types specify the type of service an employee is requesting and to which department the request is being made. Each service type has service subtypes under it. Oracle Internal Service Request ships with seeded values for service types and subtypes. The seeded values are:

#### IT Department

- Hardware Request: Laptop Docking Station, Printer, Laptop, Locking Cable with Key, Laptop Loaner, Desktop Computer, Server CapEx
- Provisioning Request: Accounting Subsystem, Employee SSO, New Hire Portal, CRM Subsystem, BI Subsystem, Email Account
- Software Request: Enterprise Software, PC Software

#### Finance Department

- Credit Card Request: Corporate Direct Amex, Corporate Amex
- Petty Cash: Petty Cash Reimbursement
- Capital Expenditure: Building Extension CapEx

#### Facilities Department

- Maintenance Request: Dangerous Conditions, Paint, Office Key
- Tour Request: VIP Tour, Class Tour
- Office Assignment: Cube, Office, Executive, Name Plate, Office Phone
- Parking Assignment: Assigned Garage Space

#### Inventory Department

- Product Request: Product for Demo, Product Long Term

#### HR Department

- Payroll: Time Card

You can add additional departments, service types, and service subtypes to meet your organization's needs. You must update the Oracle ISR Approval Decision Ruleset if you add new service types and want them used in the processing of service requests.

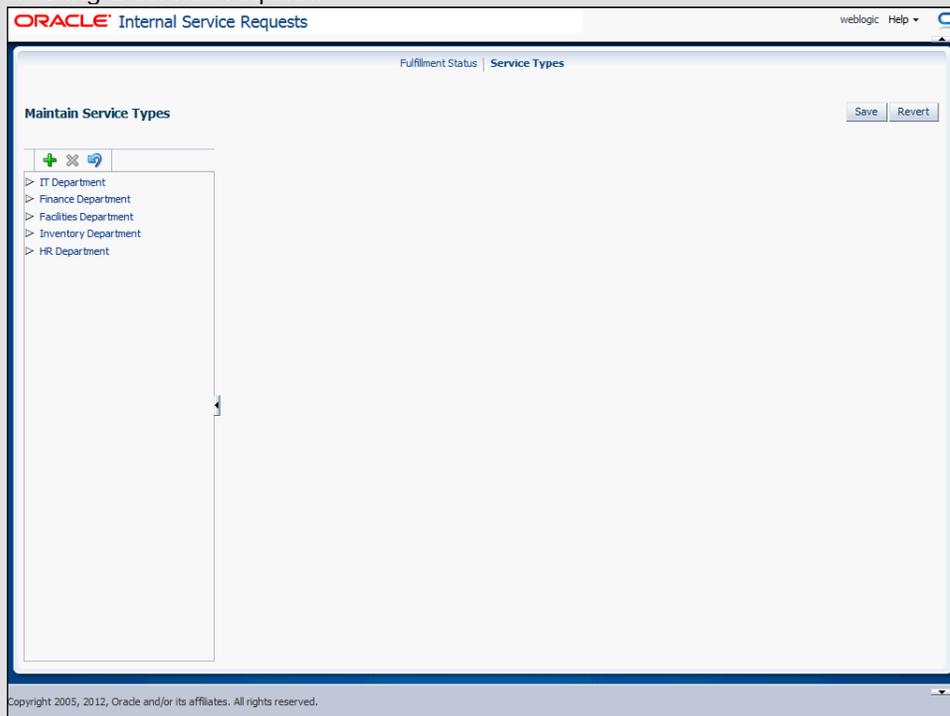
The Hardware Request service type is used in the Oracle ISR Approval Decision Ruleset. Service types that appear in this ruleset are critical; modifying or deleting these values could mean modifications will be needed to the ruleset.

The Credit Card Request service type is used in the Oracle ISR Additional Approvals Ruleset. Service types that appear in this ruleset are critical; modifying or deleting these values could mean modifications will be needed to the ruleset.

In this topic, you will modify service type options.

### **Procedure: Maintaining Service Types**

1. Begin by navigating to the **Maintain Service Types** page.  
Click the **Links** link.
2. Click the **Maintain Service Data** link.
3. Click the **Service Types** link.
4. Use the **Maintain Service Types** page to modify the service types made available when creating a service request.



5. To see the service types under a department, click the arrow to the left of the department name.  
Click the **Expand** button.
6. To see the service subtypes under a service type, click the arrow to the left of the service type name.  
Click the **Expand** button.
7. Select an item to display the options for that item.

Click the **Facilities Department** list item.

8. Use the **Deselect** button to reset the list so nothing is selected.

To add a department, which you will do next, you must have nothing selected.

Click the **Deselect** button.

9. The **Add** button creates a new item under the selected item. For example, if a service type is selected; clicking this button adds a new service subtype.

Clicking this button with nothing selected adds a new department.

Click the **Add** button.

10. **Lookup Codes** are unique keys in data tables and are built into the logic of Oracle ISR.

Click in the **Lookup Code** field.

11. A **Lookup Code** can be upper or lower case.

Enter the desired information into the **Lookup Code** field. Enter "**Marketing Department**".

12. Click the **OK** button.

13. Clicking the **Add** button with a department selected creates a new service type under the department.

Click the **Add** button.

14. The Lookup Code field is populated with the last text entered. First clear this text.

Press **[Shift+Home]**.

15. Press **[Delete]**.

16. Enter the desired information into the **Lookup Code** field. Enter "**Materials Request**".

17. Click the **OK** button.

18. Clicking the **Add** button with a service type selected creates a new service subtype under the service type.

Click the **Add** button.

19. The Lookup Code field is populated with the last text entered. First clear this text.

Press **[Shift+Home]**.

20. Press **[Delete]**.

21. Enter the desired information into the **Lookup Code** field. Enter "**Brochures**".

22. Click the **OK** button.

23. Use the **Description** field to add an optional description.

Click in the **Description** field.

24. Enter the desired information into the **Description** field. Enter "**Box of 1000 Brochures**".
25. Click the **Manager Approval Required** list.
26. Click the **No** list item.
27. If manager approval is required for this subtype, this field specifies the number of managerial levels of approval required.  
Click in the **Number of approval levels** field.
28. Although no manager approval is required, you must still enter a value.  
Enter the desired information into the **Number of approval levels** field. Enter "**0**".
29. Click in the **Lead Time(Days)** field.
30. Enter the desired information into the **Lead Time(Days)** field. Enter "**1**".
31. Click the **Fulfilling Department Manager Approval** list.
32. Click the **No** list item.
33. Click the **Search** button.
34. Click in the **Search** field.
35. You can search for a full or partial name.  
Enter the desired information into the **Search** field. Enter "**kvega**".
36. Click the **Search** button.
37. Click the **Manager** option.
38. The details for the selected employee are displayed.  
Click the **OK** button.
39. Use the **Revert** button to cancel adding a service type. This only works if the service type has not been saved.
40. Click the **Save** button.
41. Next, modify the **Lead Time** for the **Brochures** service subtype.  
Click the **Expand** button.
42. Click the **Expand** button.
43. Click the **Brochures** list item.
44. Click in the **Lead Time(Days)** field.
45. Enter the desired information into the **Lead Time(Days)** field. Enter "**2**".
46. Click the **Save** button.

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

A hard delete removes the department, service type, or service subtype from the database table, provided it is not used in a service request.

Hard-deleting a department deletes all service types under it. Hard-deleting a service type deletes all service subtypes under it.

First, perform a hard delete on the **Marketing Department**.

Click the **Marketing Department** list item.

48. Click the **Delete** button.

49. Click the **OK** button.

50. A soft delete is used for inactivating a department, service type, or service subtype already used in service requests. Inactivated types are not displayed as options on the **Submit Service Request** page.

Next, perform a soft delete on the **Paint** service subtype.

Click the **Expand** button.

51. Click the **Expand** button.

52. Click the **Paint** list item.

53. Click the **Active** option.

54. Click the **Save** button.

55. The **Paint** service subtype is now inactive.

56. You have completed the **Maintaining Service Types** topic.

## Maintaining Fulfillment Status

Fulfillment status codes specify the progress toward satisfying the service request. Oracle Internal Service Request ships with seeded values for fulfillment status codes. The seeded values are:

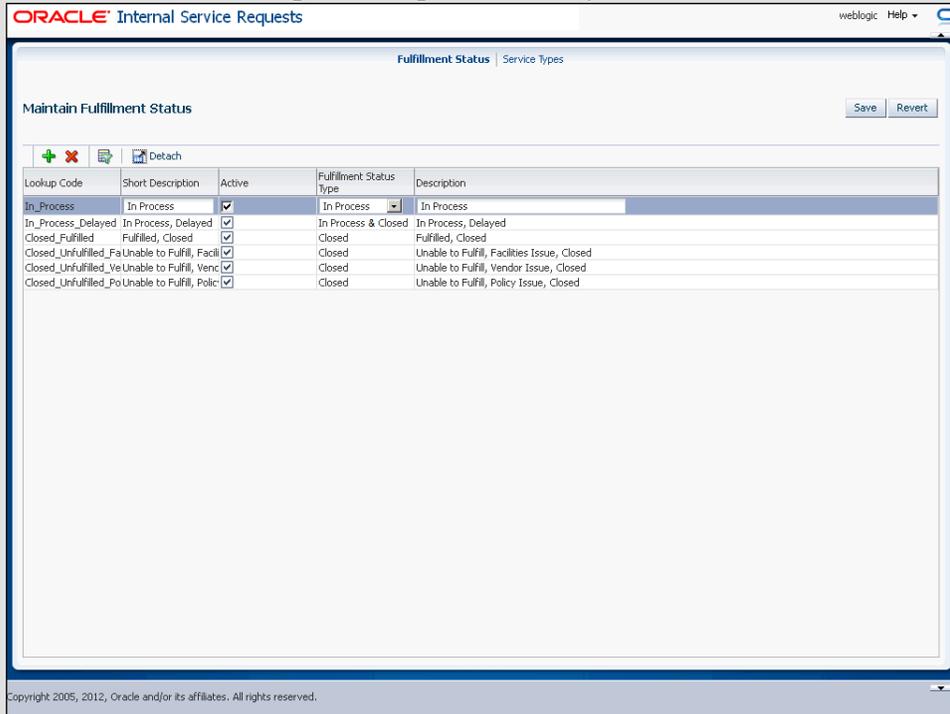
- In Process
- In Process, Delayed
- Fulfilled, Closed
- Unable to Fulfill, Facilities Issue, Closed
- Unable to Fulfill, Vendor Issue, Closed
- Unable to Fulfill, Policy Issue, Closed

You can add additional fulfillment status codes to meet your organization's needs.

In this topic, you will modify fulfillment status code options.

**Procedure: Maintaining Fulfillment Status**

1. Begin by navigating to the **Maintain Fulfillment Status** page.  
Click the **Links** link.
2. Click the **Maintain Service Data** link.
3. Use the **Maintain Fulfillment Status** page to modify the fulfillment status codes made available when reviewing or closing a service request.



4. First, add a fulfillment status code.  
Click the **Add** button.
5. **Lookup Codes** are unique keys in data tables and are built into the logic of Oracle ISR.  
Click in the **Lookup Code** field.
6. A **Lookup Code** can be upper or lower case.  
Enter the desired information into the **Lookup Code** field. Enter **"Closed\_Unfulfilled\_Legal"**.
7. Next, specify a short description. Short descriptions appear when the fulfilling employee reviews or closes a service request.  
Click in the **Short Description** field.
8. Enter the desired information into the **Short Description** field. Enter **"Unable to Fulfill, Legal Issue, Closed"**.
9. Click the **Active** option.
10. Click the **Fulfillment Status Type** list.

11. Next, specify a fulfillment status type.  
Click the **Closed** list item.
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 "**Unable to Fulfill, Legal Issue, Closed**".
14. Use the **Revert** button to cancel adding a fulfillment status code. This only works if the fulfillment status code has not been saved.
15. Save the fulfillment status code to make it available on the **Review Service Request** and **Close Service Request** pages.  
Click the **Save** button.
16. The fulfillment status code **Closed\_Unfulfilled\_Legal** is now added.
17. Next, modify the description for the **Closed\_Unfulfilled\_Legal** fulfillment status code.  
  
By default, the first row is automatically selected. When modifying or deleting a status code, ensure that the row you want to take action on is selected. You can click anywhere in the row to select it.  
  
Click the row header.
18. Click in the **Description** field.
19. Enter the desired information into the **Description** field. Enter "**, Confidential**".
20. Click the **Save** button.
21. The **Closed\_Unfulfilled\_Legal** lookup code is now modified.
22. There are two types of delete, a hard delete and soft delete.  
  
A hard delete removes the fulfillment status code from the database table, provided it is not used in a service request.  
  
First, perform a hard delete on the code **Closed\_Unfulfilled\_Legal**.  
  
Click the row header.
23. Click the **Delete** button.
24. The fulfillment status code **Closed\_Unfulfilled\_Legal** is now deleted.
25. A soft delete is used for inactivating a fulfillment status code already used in service requests. Inactivated codes are not displayed as options on the **Review Service Request** and **Close Service Request** pages.  
  
Next, perform a soft delete on the **Closed\_Unfulfilled\_Policy** code.  
  
Click the row header.
26. Click the **Active** option.

27. Confirm that you want to make the **Closed\_Unfulfilled\_Policy** code inactive.

Click the **OK** button.

28. The fulfillment status code **Closed\_Unfulfilled\_Policy** is now inactive.

29. Click the **Save** button.

30. Next, query the **Closed** fulfillment status codes.

Click the **Query By Example** button.

31. You can query on any field by clicking into that field.

Click in the **Fulfillment Status Type** field.

32. You can query using whole or partial words.

Enter the desired information into the **Fulfillment Status Type** field. Enter "**Closed**".

33. Press the Enter key to initiate the query.

Press **[Enter]**.

34. Only the **Closed** fulfillment status codes appear.

35. You must clear the queried data to view the full list of fulfillment status codes.

Click in the **Fulfillment Status Type** field.

36. Select the queried data.

Press **[Shift+Home]**.

37. Press **[Delete]**.

38. Press **[Enter]**.

39. The full list of fulfillment status codes is viewable again.

The **Query By Example** button can be toggled on or off.

40. You have completed the **Maintaining Fulfillment Status Codes** topic.

## Understanding the Business Rules

Oracle ISR ships with predefined business rules. This section covers the business rules you can modify.

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

- Describe the Approval Decision Ruleset.
- Describe the Management Chain Ruleset.
- Describe the Additional Approvals Ruleset.
- Describe the Additional Approvals Decision Ruleset.

## Understanding the Approval Decision 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 Suite and Oracle Business Process Management Suite*

Oracle Internal Service Request uses the ISR Approval Decision Table, in the Approval Decision Ruleset, to determine whether management approval is required for a service request, and if so, how many management levels are required. This decision table includes conditions and actions as its rows and rules as its 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 value of otherwise means "all values not listed." A dash means "this value doesn't matter." Bucketsets and/or globals are used to set pre-defined values for certain rules.

Upon submission of a service request, the rules engine tests each condition. If a combination of condition values matches a rule, the corresponding actions are taken. The ISR Approval Decision Table provides the details for each condition, its rules, and the actions to execute. Following the table is an example scenario explaining how a service request is processed based on a given condition and action.

### ISR Approval Decision Table

		R1	R2	R3
<b>Conditions</b>	ServiceRequestBOType.empTitle	otherwise	otherwise	"Manager2"
	ServiceRequestBOType.serviceTypeCode	otherwise	"Hardware_Request"	-
<b>Actions</b>	Assert new ApprovalRulesOutcomeBOType	✓	✓	✓
	approvalReqd:Boolean	true	true	false
	numOfApprLevels:Integer	ServiceRequestBOType.numOfApprovalLevels	ServiceRequestBOType.numOfApprovalLevels	null

Layla Jones does not have the employee title of a second level manager, and she submits a service request with a service subtype other than Hardware Request. This request would take one or two levels of management approval depending on the nature of the request.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Service request 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 Management Chain 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 Suite and Oracle Business Process Management Suite*

Oracle Internal Service Request uses the Management Chain Rule, in the Management Chain Ruleset, which includes a condition (IF) statement and an action (THEN) statement. The condition statement simply ensures that a service type has been selected. The action

statement creates a list of managers whose approval is required based on the following information:

- The service request subtype, which determines how many levels of management approval are normally required for a service request.
- The identity of the submitting employee, which determines the specific managers whose approval is needed.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Service request 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 Additional Approvals 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 Suite and Oracle Business Process Management Suite*

Oracle Internal Service Request uses the Additional Approvals Rule 1 and Rule 2, in the Additional Approvals Ruleset, each of which includes a condition (IF) statement and an action (THEN) statement.

The condition statement of Rule 1 specifies that the service type is Credit Card Request. The action statement creates a resource list that includes Central Region.

The condition statement of Rule 2 specifies that the service type isn't Credit Card Request. The action statement creates a resource list that does not include Central Region.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Service request 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 Additional Approvals Decision 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 Suite and Oracle Business Process Management Suite*

Oracle Internal Service Request uses the CapEx Additional Approval Decision Table, in the Additional Approval Decision Ruleset, to determine whether additional approval is required for a capital expenditure service requests. This decision table includes conditions and actions as its rows and rules as its 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 value of otherwise means "all values not listed."

Upon submission of a capital expenditure service request, the rules engine tests each condition. If a combination of condition values matches a rule, the corresponding actions are taken. The CapEx Additional Approval Decision Table provides the details for each condition,

its rules, and the actions to execute. Following the table is an example scenario explaining how a capital expenditure service request is processed based on a given condition and action.

**CapEx Additional Approval Decision Table**

		R1	R2	R3
<b>Conditions</b>	ServiceRequestBOType.serviceSubTypeCode	otherwise	"Server_CapEx"	"Building_CapEx"
<b>Actions</b>	assert new CapExRuleOutcomeBOType	✓	✓	✓
	additionalApprovalReqd;java.lang.Boolean	false	true	true

Manny Salas submits a capital expenditure service request for a new building. Because this request is a capital expenditure, it requires additional approval.

You can modify the existing ruleset, conditions, or actions. Take caution before modifying a condition or action, it can require source code changes. Service request 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 Internal Service Request Reports

This section is for managers reviewing reports for their directs. Use Oracle BAM Active Viewer to view the reports delivered with Oracle Internal Service Request (ISR).

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 Internal Service Request includes eight reports within two dashboards, Count of Request Status by Service Type and Service Request Analysis. These reports use information from the service requests submitted in Oracle ISR. Information from saved service requests is not used in the reports.

### Count of Request Status by Service Type

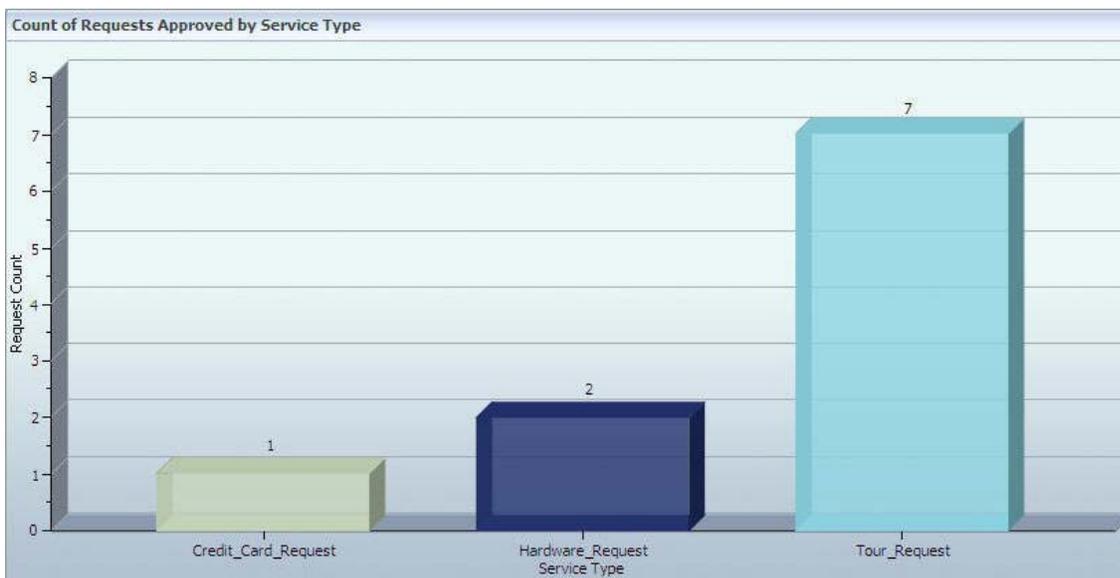
The Count of Request Status by Service Type dashboard includes four reports pertaining to request counts by service type with these statuses: approved, reviewed, fulfilled, and closed without fulfillment. The following provides an explanation of each report on the dashboard, along with an image of a sample report for each.

For all four Count of Request Status by Service Type dashboard reports, clicking on a bar shows the list of requests used to create the bar. For example:

Count of Requests Approved by Service Type		
METRIC_serviceType	BI_NAME	EVALUATION_EVENT
Tour_Request	Manager approve service request	COMPLETE
Tour_Request	Manager approve service request	COMPLETE
Tour_Request	Manager approve service request	COMPLETE
Tour_Request	Manager approve service request	COMPLETE
Tour_Request	Manager approve service request	COMPLETE
Tour_Request	Manager approve service request	COMPLETE
Tour_Request	Manager approve service request	COMPLETE

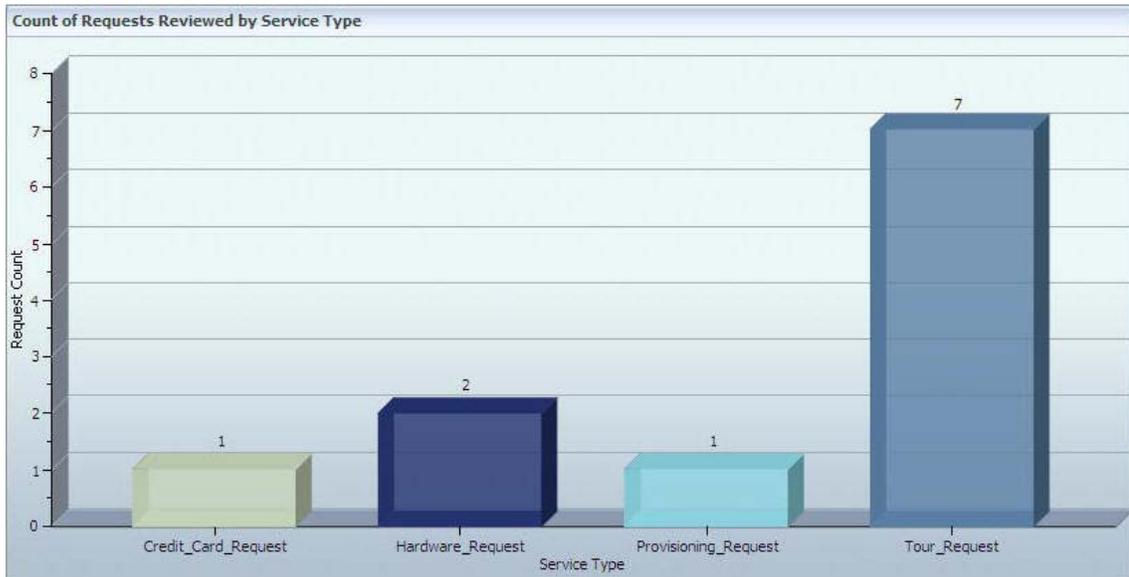
### Count of Requests Approved by Service Type

The Count of Requests Approved by Service Type is a bar chart report summarizing the approved request count on the Y-axis for the service types on the X axis.



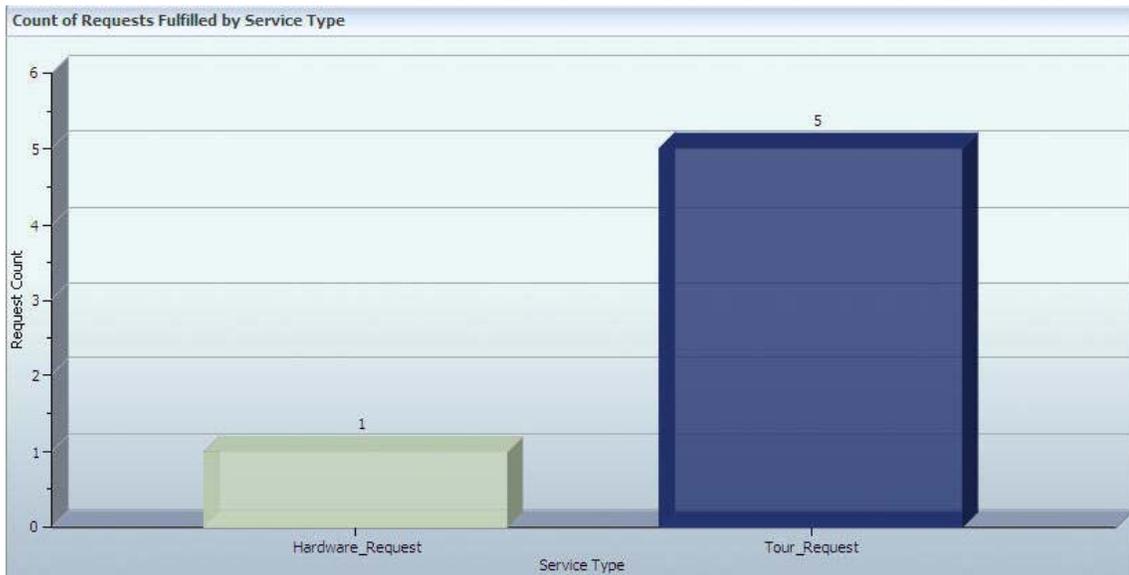
Count of Requests Reviewed by Service Type

The Count of Requests Reviewed by Service Type is a bar chart report summarizing the reviewed request count on the Y-axis for the service types on the X-axis.



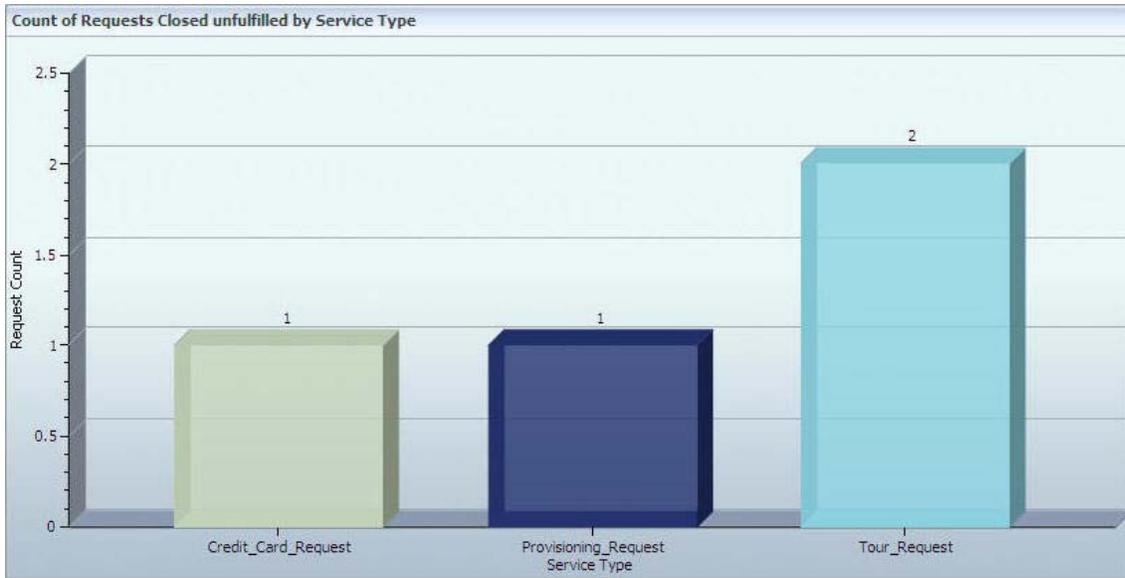
Count of Requests Fulfilled by Service Type

The Count of Requests Fulfilled by Service Type is a bar chart report summarizing the fulfilled request count on the Y-axis for the service types on the X-axis.



Count of Requests Closed Unfulfilled by Service Type

The Count of Requests Closed Unfulfilled by Service Type is a bar chart report summarizing the unfulfilled request count on the Y-axis for the service types on the X-axis.



**Service Request Analysis**

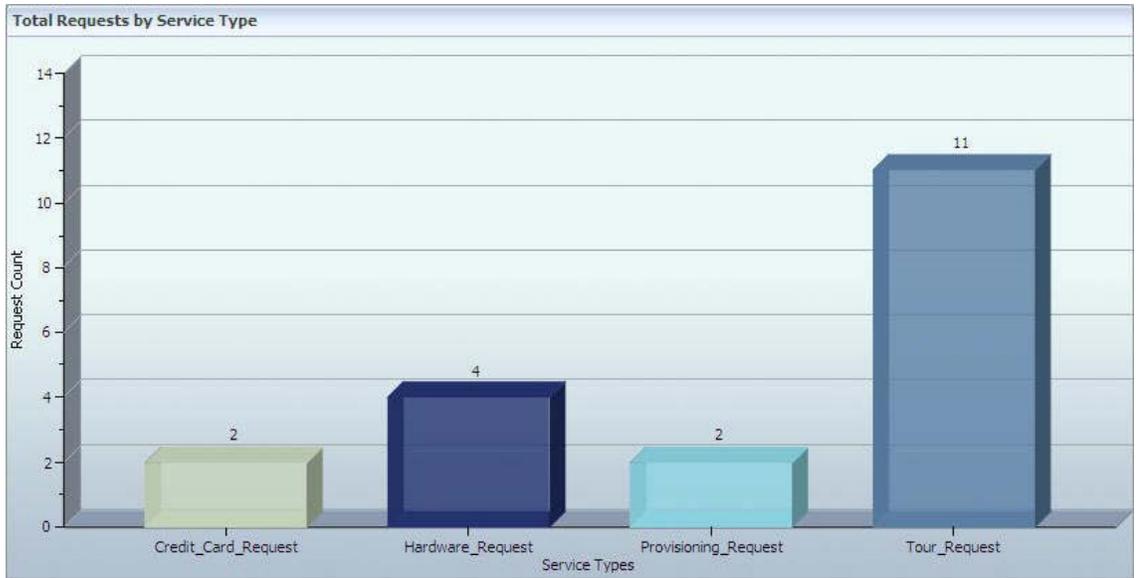
The Service Request Analysis dashboard includes four reports pertaining to total requests by service type, submitter, manager, and fulfilling department. The following provides an explanation of each report on the dashboard, along with an image of a sample report for each.

For all four Service Request Analysis dashboard reports, clicking on a bar or pie slice shows the list of requests used to create the bar or slice. For example:

METRIC_submitterEmployee	LATEST	METRIC_fulfillingEmployee
jcooper	Y	cdoyle
jcooper	Y	jlondon

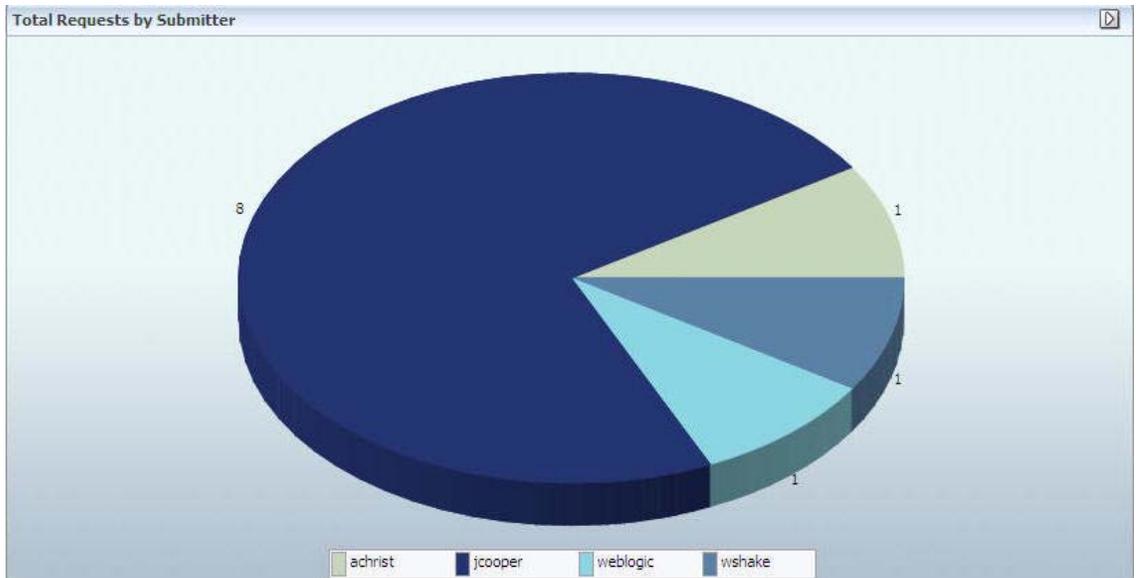
**Total Requests by Service Type**

The Total Requests by Service Type is a bar chart report summarizing the total requests on the Y-axis for the service types on the X-axis.



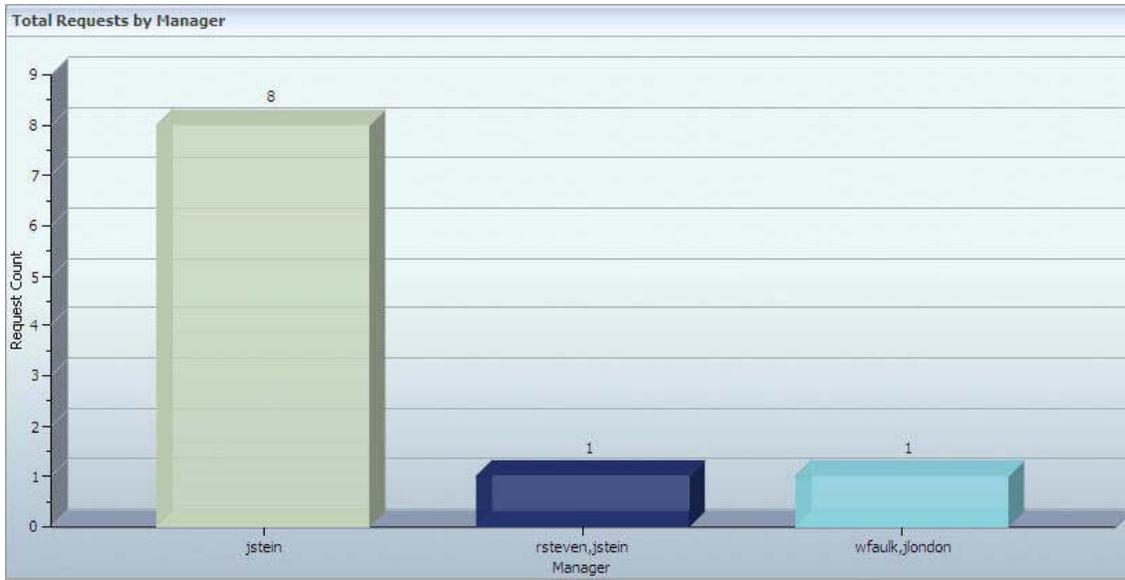
Total Requests by Submitter

The Total Requests by Submitter is a pie chart report summarizing total requests broken down by submitter.



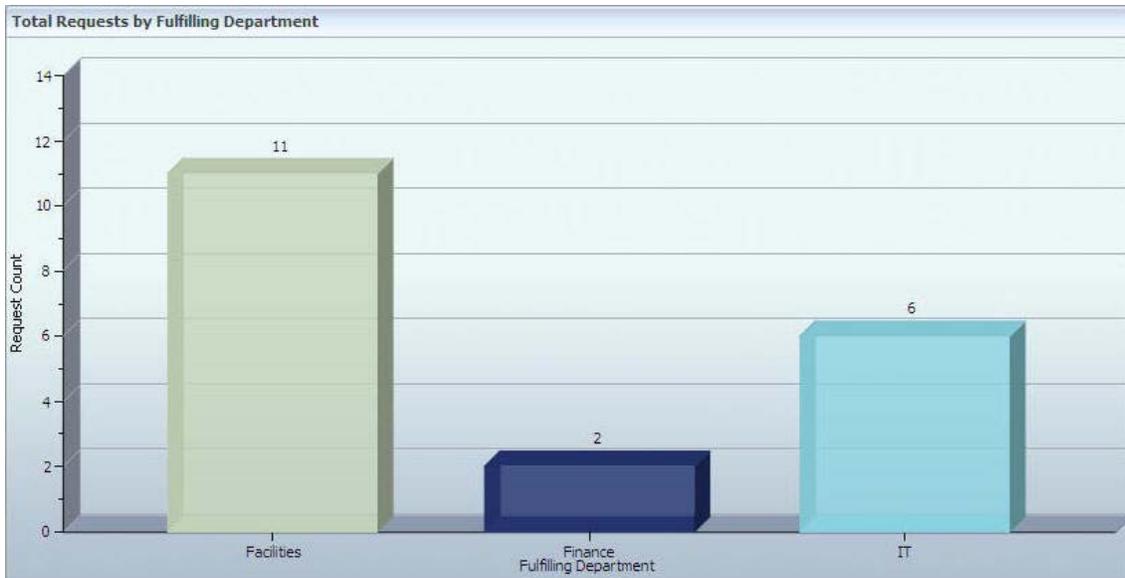
Total Requests by Manager

The Total Requests by Manager is a bar chart report summarizing the total requests on the Y-axis for the managers on the X-axis.



Total Requests by Fulfilling Department

The Total Requests by Fulfilling Department is a bar chart report summarizing the total requests on the Y-axis for the departments on the X-axis.



## Delivered Documentation

This section provides a complete list of the delivered documentation for Oracle Internal Service Request (ISR).

The delivered documents are:

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

**Oracle Fusion Middleware Extensibility Guide for Oracle Process Accelerators** - This content provides information about customizing and extending Oracle Process Accelerators.

**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 Internal Service Request Process Accelerator** - This content provides information on how to use and modify Oracle Internal Service Request Process Accelerator. The content of this manual is also available in the following formats:

- Process Accelerator Help system
- User Productive 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.