

Oracle® Universal Work Queue

Concepts and Procedures

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Understanding Oracle Universal Work Queue

This topic group provides an overview of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationship to other Oracle or third-party applications.

The following topics are covered in this section:

- [What is Oracle Universal Work Queue?](#)
- [Understanding Oracle Universal Work Queue's Relationship, Integration and Dependencies](#)
- [Oracle Universal Work Queue Process Flow](#)

What is Oracle Universal Work Queue?

Oracle Universal Work Queue is unified view of agent work, providing a common view and simplifying multi-media access and the complexity of working across business channels and tasks. The work portal enables Oracle CRM business applications to request, receive and display data as it corresponds to media and tasks, optimizing agent work. Media items include inbound, outbound, and e-mail. Tasks include work items such as, to-do's and service requests. Tasks, which are created in Oracle CRM business applications are made available through Oracle Universal Work Queue for handling.

When Oracle Interaction Blending is installed and in use, Oracle Universal Work Queue will automatically present work items to an agent. Work items are presented based on skill level, service levels, and business rules. These attributes and requirements which are established in Oracle CRM business applications, ensure that service levels, customer support, and business requirements are satisfied.



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Oracle Universal Work Queue provides access to tasks, which originate and are, assigned in Oracle CRM business applications for an agent to work. These tasks include such functions as, to-do lists, call backs, quotes, opportunities, etc.

All agent-customer interactions that occur from the work performed through Oracle Universal Work Queue are tracked and recorded. The details of these interactions can be viewed in the applicable Oracle CRM business application.

Understanding Oracle Universal Work Queue's Relationship, Integration and Dependencies

Oracle Universal Work Queue facilitates an interaction center by serving as a gateway for the delivery and presentation of business and customer related data and work from Oracle CRM business applications, which are considered *work providers*.

They include:

- Oracle Collections
- Oracle Customer Care
- Oracle Financial Services
- Oracle Support
- Oracle TeleSales

Media work items are presented to Oracle Universal Work Queue through entities known as *media providers*.

They are:

- Inbound Telephony
- Outbound Telephony
- E-Mail

Through Oracle Universal Work Queue's integration with Oracle Interaction Blending, media work items are dynamically presented to an agent based on established business rules, service levels, and agent-specific skills. For example, an agent capable of speaking multiple languages whom is assigned to several campaigns would be presented work based on that skill set. If the same agent were also skilled in handling inbound calls, the work would be delivered to the agent based on meeting customer and business needs and requirements.

Access to tasks is provided through Oracle Universal Work Queue's common view. Tasks, as they relate to the Oracle CRM business application from which they originate, are agent-specific in their assignment.

The following list is a representative sample of tasks that can be managed and worked through Oracle Universal Work Queue:

- To-Do's
- Call Backs
- Leads
- Opportunities
- Quotes
- Personal Tasks

Customer-agent interactions that occur as a result of the work performed through Oracle Universal Work Queue are tracked and reported to the Oracle CRM business application. These interactions are available for viewing and statistical reporting within the respective Oracle CRM business application.

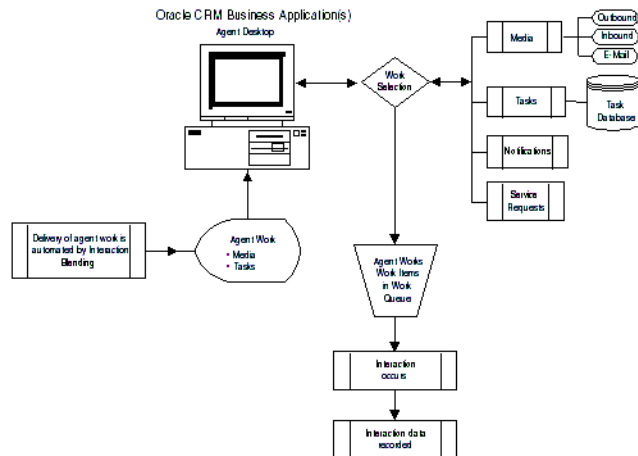
Oracle Universal Work Queue Key Terms

There are several terms that are key to understanding Oracle Universal Work Queue and how work is delivered to the *work portal*.

These terms include:

- Work Provider - is used to represent any Oracle CRM business application from which agent work originates.
- Media Provider - represents the provider or source of media-based work (inbound, outbound, and e-mail).
- Media Controller - is a media control application that controls a specific media service, e.g., Softphone.
- Work Item - represents an agent-specific item, assigned in the Oracle CRM business application and presented in Oracle Universal Work Queue for processing. There are four types of work items, media, tasks, service requests, and defects.
- Media Item - represents specific media work items, such as inbound calls, outbound calls, or e-mails.
- Task Management - is the monitoring and managing of tasks.
- Tasks - refer to work items that originate in Oracle CRM business applications and are specifically assigned to an agent. An example of a task is a call back.

Oracle Universal Work Queue Process Flow



Using Oracle Universal Work Queue

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

The topics covered in this group include:

- n [Viewing Agent Work](#)
- n [Selecting Agent Work](#)
- n [Working Media Items](#)
- n [Handling Inbound Calls](#)
- n [Conducting Outbound Calls](#)
- n [Processing Electronic Mail](#)
- n [Viewing Tasks](#)
- n [Selecting Tasks to Work](#)
- n [Reviewing Defects](#)
- n [Working Service Requests](#)
- n [Monitoring My Work](#)

Viewing Agent Work

When you first enter Oracle Universal Work Queue from an Oracle CRM business application, all work assigned to an agent will display in the work portal for selecting and working. Use this procedure to view agent work to be performed.

Prerequisites

An agent must be logged into an Oracle CRM business application and must have selected the Oracle Universal Work Queue option.

Steps

1. From the Oracle CRM business application, choose **Oracle Universal Work Queue**.

The work queue for the agent will display.

References

The agent's work is displayed in two panes in Oracle Universal Work Queue. The left pane is the Work Selector and is made up of two columns, My Work and Count. The My Work view lists all work types for which an agent is assigned. The Count column contains the number of items that currently exist in the work queue for each work type to be worked.

The right pane is the Detail pane. The details associated to the work item are available in this view. The columns in the Detail pane can be filtered to support various views. Double clicking on the column header will filter the view. The work type is identified in the Class column. The type of task, if assigned to an agent, will display in the Type column. The Description, Priority, and Status columns detail this information, respectively. The Due Date column contains the date and time stamp associated to the work item. The Source Document relates to the origin of the business opportunity in the Oracle CRM business application. For example, it could represent a lead or quote that may have been provided.

Selecting Agent Work

Upon viewing work to be performed within Oracle Universal Work Queue, agents will select the work types (tasks, defects, service requests, inbound telephony, outbound telephony, and e-mail) from the view. You will have to complete work activities in each work type before selecting a different work type. For example, you will need to finish working media work types before you select tasks. Use this procedure to select work types from Oracle Universal Work Queue.

Prerequisites

Agent must have selected Oracle Universal Work Queue from the Oracle CRM business application and work items and/or tasks must have been assigned the agent.

Steps

1. From Work Selector, select **My Work**.

My Work displays agent work (tasks and media) for which the agent is assigned. The number of work items to be worked will display in the Count column for each work type.

2. Select the appropriate work type or click on the work item in the detail pane of Oracle Universal Work Queue.

The appropriate Oracle business application window for the work type will display.

3. Click **Get Work** to access the next item of the same work type.

The next item in the work queue for the selected work type will be presented to the agent for working. If Oracle Interaction Blending is being used, media work items will be presented to an agent based on level of service, agent-skill sets and business rules.

4. Click **Cancel** to undo the selection of a work item.

Working Media Items

In a blended environment within an interaction center, all media items are presented to an agent to work based on agent-skill sets, level of service, and business rules. If you are not working in a blended environment, you will select each of the work types directly from the work selector.

You will continue to work within the selected mode until you either select a different work type or you cancel from the present work type. At that point you will manually retrieve the next work item from the work queue.

Topics include:

- n [Handling Outbound Calls](#)
- n [Conducting Outbound Calls](#)
- n [Processing Electronic Mail](#)

Handling Inbound Calls

Inbound calls are handled via the access provided through Oracle Universal Work Queue to the inbound telephony media provider. Inbound calls can be presented in a continual mode to the agent, eliminating the need to navigate between applications. Use this procedure to quickly and easily handle inbound calls.

Prerequisites

Agent must be assigned to handle inbound calls and inbound calls must exist in the queue.

Steps

1. From the **Work Selector**, click **Media**.
2. Double-click on the appropriate campaign.

The applications window for the Oracle CRM business application will display. Refer to the documentation for the Oracle CRM business application for detailed information about handling inbound calls.
3. Click **Get Work** to select the next call when handling calls in a non-continuous mode.
4. Click **Cancel** undo the selection of a work item.

Conducting Outbound Calls

The Outbound Telephony option allows you to conduct outbound calls for designated campaigns. Use this procedure to perform outbound dialing.

Prerequisites

Agent must be assigned to handle outbound calls and call list must exist.

Steps

1. From the **My Work**, click **Outbound Telephony**.

The outbound campaigns in which you are assigned to work will display in the Detail pane. The number of outbound calls to be conducted for each campaign will display next to the campaign name.
2. Select the appropriate campaign by double clicking on the campaign name.

The applications window for the Oracle CRM business application will display. Refer to the documentation for the Oracle CRM business application for detailed information about handling outbound calls.

3. Click **Get Work** to select the next call when conducting calls in a non-continuous mode.
4. Click **Cancel** undo the selection of a work item.

Processing Electronic Mail

The Electronic Mail option from the Work Selector in Oracle Universal Work Queue allows you to access e-mail campaigns. Use this procedure to access and manage e-mail campaigns.

Prerequisites

Agent must be assigned to handle e-mail campaigns and e-mail campaigns must have been defined.

Steps

1. From the **My Work**, click **Electronic Mail**.

The e-mail campaigns in which the agent has been assigned to work will display for selection in the Detail pane. The number of e-mails to be worked within each campaign will display next to the campaign name.

2. Double-click on the appropriate e-mail campaign.

The applications window for the Oracle CRM business application will display. Refer to the documentation for the Oracle CRM business application for detailed information about processing electronic mail.

3. Click **Get Work** to select the next e-mail within the assigned campaign for processing. You will use this button when you are working in a non-continuous mode.
4. Click **Cancel** undo the selection of a work item.

Working Non-Media Items

Oracle Universal Work Queue is used to provide agents with non-media work items such as tasks, defects, and service requests. Oracle Universal Work Queue can be set up as a work portal to provide agents with both media and non-media work items *or* it can be set up as a work portal for *only* non-media work items.

Topics include:

- n [Viewing Tasks](#)
- n [Selecting Tasks to Work](#)
- n [Reviewing Defects](#)

Viewing Tasks

Tasks that have been created and assigned to an agent in Oracle CRM business applications, can be viewed and selected by the agent in Oracle Universal Work Queue. The total number of tasks to be worked along with a detail count by task type will display in the Work Selector. Use this procedure to view tasks to be worked in Oracle Universal Work Queue.

Prerequisites

An agent must be logged into an Oracle CRM business application and must have selected the Oracle Universal Work Queue option. The agent must be set up and assigned to work tasks. Tasks must have been assigned, specifically to the agent in the Oracle CRM business application.

Steps

1. From the Work Selector, choose **Tasks**.

A list of tasks that are to be worked by the agent will display in the Detail pane. The first task in the list will be highlighted by default and additional details pertaining to the task will display in the lower portion of the screen. Each task is categorized by number, type, description, priority, status, due date, and source document.

References

Tasks within the Work Selector can be viewed or selected. When a task is highlighted for viewing, details associated to the task will display in the bottom half of the Detail pane. You can drill down to a specific task type within the Work Selector. When you drill down by task type, only tasks for that particular type will display in the Detail pane for viewing. When you select a task to work, the applications window for the Oracle CRM business application in which the task is associated will display.

Selecting Tasks to Work

Tasks are assigned to agents for working and follow-up in the Oracle CRM business applications. When you need to work a task for a customer or client, you will have to select it from the tasks that have been assigned to you. These tasks can be selected from the Task Detail pane in Oracle Universal Work Queue. Use this procedure to select tasks to work in work queue.

Prerequisites

An agent must be logged into an Oracle CRM business application and must have selected the Oracle Universal Work Queue option. The agent must be set up and assigned to work tasks. Tasks must have been assigned, specifically to the agent in the Oracle CRM business application.

Steps

1. From My Work, choose **Tasks**.

The Tasks option displays all of the task types that have been assigned to you to work. They may include functions such as, call backs, quotes, leads, etc. In the Task Detail pane, the details associated to each of the tasks in the work queue will display. Each task is identified by number, type, description, priority, status, due date, and source document. The first task in the list is highlighted by default and a preview of the task details will display in the bottom portion of the screen.

2. Identify the task to work.
3. Double-click on the task to select it or select the **Details** button.

The applications window for the Oracle CRM business application in which the task originated will display for you to work and manage the task.

4. Click **Get Work** to access the next item of the same work type.

The next task in the work queue for the selected work type will be presented to you to work.

5. Click **Cancel** undo the selection of a work item.

Reviewing Defects

Defects that have been created and assigned to an agent in Oracle CRM business applications, can be viewed and worked from within Oracle Universal Work Queue. The total number of defects you are assigned to review will display in the Work Selector. Use this procedure to review defects from within Oracle Universal Work Queue.

Prerequisites

An agent must be logged into an Oracle CRM business application and have selected the Oracle Universal Work Queue option. The agent must be assigned the task of reviewing defects. Defects must exist for the agent in the Oracle CRM business.

Steps

1. From My Work, choose **Defects**.

The Defects option displays the total number of defects that have been assigned to the agent for reviewing. The detail for each defect is will display in the Defect detail pane. Each is categorized by class, type, description, priority, status, due date, and source document. The first defect in the list by default is highlighted. You can filter the view of defects to satisfy work priorities.

2. Identify the defect to review.
3. Double-click on the defect to select it or choose the **Get Work** button.

The applications window for the Oracle CRM business application in which the defect originated, will display for you to review and process the defect.

4. Click **Get Work** to access the next defect.

When you choose the Get Work button, the next defect assigned to you for reviewing will display. Refer to the documentation for the Oracle CRM business application in which you were working for information about how to review and process defects.

5. Click **Cancel** undo the selection of a defect.

Working Service Requests

Service requests that have been assigned to an agent in an Oracle CRM business application, can be viewed, selected and worked from Oracle Universal Work Queue. The total number of service requests assigned to you will display in the Work Selector. Use this procedure to access and work service requests from within Oracle Universal Work Queue.

Prerequisites

An agent must be logged into an Oracle CRM business application and have selected the Oracle Universal Work Queue option. The agent must be assigned the task of working service requests. Service requests must exist for the agent to work in the Oracle CRM business.

Steps

1. From My Work, choose **Service Requests**.

The Service Requests option displays the total number of service requests that have been assigned to the agent to work. The detail for each service request will display in the Service Request Detail pane. Each is categorized by class, type, description, priority, status, due date, and source document. The first service request in the list by default, is highlighted. You can filter the view of service requests to be worked, to satisfy assigned work priorities.

2. Identify the service request to work.
3. Double-click on the service request to select it or select the **Get Work** button.

The applications window for the Oracle CRM business application in which the service request originated, will display for you to complete the service request.

4. Click **Get Work** to access the next service request.

When you choose the Get Work button, the next service request assigned to work will display. Refer to the documentation for the Oracle CRM business application in which you were working for information about how to process service requests.

5. Click **Cancel** undo the selection of a service request.

Monitoring My Work

Within Oracle Universal Work Queue, you can obtain a real-time view of the number of work items that have been assigned to you and their status. Use this procedure to monitor the number of work items assigned to an agent.

Prerequisites

An agent must be logged into an Oracle CRM business application and have selected the Oracle Universal Work Queue option. The agent must be assigned to work one or more of the work types (tasks, defects, service requests, inbound telephony, outbound telephony, or electronic mail). Work items must exist in the Oracle CRM business for the work type.

Steps

6. From the Work Selector, choose **My Work**.

The total number of work items for each work type assigned to you will display in the Work Selector view. The number of work items for individual work types can also be viewed from the Work Selector view. As you process these items in the Oracle CRM business application and work between the work types, the count will reflect the work performed. The counts will change as new items are assigned and items are processed.