Oracle® CRM Application Foundation

Concepts and Procedures

Release 11*i*

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Oracle CRM Application Foundation Concepts and Procedures Release 11*i*

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Contents

Using Resource Manager

Administering Resource Manager

Understanding Notes

Using Notes (HTML)

Using Notes (Forms)

Using Spreadtables

Understanding Territory Manager

Using Territory Manager

Administering Territory Manager

Understanding Assignment Manager

Using Assignment Manager

Understanding Task Manager (HTML)

Understanding Task Manager (Forms)

Using Task Manager (HTML)

Using Task Manager

Understanding Calendar (HTML)

Understanding Calendar (Forms)

Using Calendar (HTML)

Using Calendar

Administering Calendar

Understanding Interaction History

Using Interaction History (Forms)

Using Interaction History (HTML)

Administering Interaction History (Forms)

Administering Interaction History (HTML)

Understanding Fulfillment

Administering Fulfillment

Understanding Escalation Management

Using Escalation Manager

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Oracle CRM Application Foundation Concepts and Procedures, Release 11*i*

Part No. A92119-01

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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle CRM Application Foundation Concepts and Procedures.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area
- *Oracle CRM Application Foundation*

  If you have never used *Oracle CRM Application Foundation*, Oracle suggests you attend one or more of the *Oracle CRM Application Foundation* training classes available through Oracle University.
- The Oracle Applications graphical user interface

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use *Oracle CRM Application Foundation*. It is divided into sections, with each section containing material on an Application Foundation module.

- Chapter 1 describes the Oracle CRM Application Foundation module Resource Manager

- Chapter 2 describes the Oracle CRM Application Foundation module Notes Manager
- Chapter 3 describes the Oracle CRM Application Foundation module Spreadtable
- Chapter 4 describes the Oracle CRM Application Foundation module Territory Manager
- Chapter 5 describes the Oracle CRM Application Foundation module Assignment Manager
- Chapter 6 describes the Oracle CRM Application Foundation module Task Manager
- Chapter 7 describes the Oracle CRM Application Foundation module Calendar
- Chapter 8 describes the Oracle CRM Application Foundation module Interaction History
- Chapter 9 describes the Oracle CRM Application Foundation module Fulfillment
- Chapter 10 describes the Oracle CRM Application Foundation module Escalation Manager

Note: The *Oracle CRM Technology Foundation Concepts and Procedures Guide* contains information relating to User Management including user registration and management performed through the System Administrator's Console.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of *Oracle CRM Application Foundation*.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle CRM Application Foundation shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use *Oracle CRM Application Foundation*.

Oracle CRM Technology Foundation Concepts and Procedures Guide contains information relating to User Management including user registration and management performed through the System Administrator's Console.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of *Oracle CRM Application Foundation* (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle CRM Application Foundation Implementation Guide

The implementation process for each Application Foundation module is described in this manual.

Oracle CRM Application Foundation API Reference Guide

This manual describes the public, supported Application Foundation APIs. It includes API information for the following Application modules:

- Interaction History
- Resource Manager
- Task Manager
- Fulfillment
- Notes

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing *Oracle CRM Application Foundation*. This manual details additional steps and setup considerations for implementing *Oracle CRM Application Foundation* with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use *Oracle CRM Application Foundation* with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of *Oracle CRM Application Foundation*.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the *Oracle CRM Application Foundation* implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master *Oracle CRM Application Foundation* and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep *Oracle CRM Application Foundation* working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Understanding Resource Manager

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications. This section covers the following topics:

Resource Manager Overview

The Resource Manager provides lists of resources, as individuals, groups, and teams, for applications to access and manage their resources. Resources are defined as the employees, supplier contacts, parties and partners that are used by the different CRM components to accomplish business objectives. You can use Resource Manager to import and view resources, define resources, define roles and role types, create teams and groups, and organize resources within those teams and groups. Defining and organizing your resource information makes your resources available to the connected application modules for work action. Resources can be organized into groups and teams. Each group or team can be defined in one of two ways, a role or a role type.

What's New in This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for the Resource Manager:

- Maintaining Personal Information
- Viewing and Creating Employee Resources
- Viewing and Creating Group Information
- Managing a Resource's Skill Level
- Defining Web Availability

> **Note:** Resources created in the Forms version of Resource Manager are viewable in the HTML version. The same is true for resources created in HTML.

Terms and Definitions

The following table describes terms and definitions associated with the Resource Manager.

Resource Manager Terms and Definitions

Term	Description
Employee	An employee is a person who has been hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).
Resource Manager	A single place for defining, accessing, and maintaining all CRM and ERP Resources.

Resource Manager Terms and Definitions

Term	Description
Category	A category is the highest level that a resource can be rated in relation to skills management. If a resource is rated at the category level, and not rated at any one of the product, platform, or product code levels, it does not imply the resource is also rated at those levels. Categories can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Component	Within a product in skills management, there are numerous components. A resource can be rated individually for each of those components. Components can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Other/TBH	This is the only resource that is created and not imported. Use this resource to create a salesperson that is going to be hired (TBH) but is not yet an employee.
Partner	A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits. A Partner resource can be imported as resources from Accounts Receivables.
Party	A party is an entity that can enter into a business relationship. A Party resource can be imported as resources from Accounts Receivables.
Platform	Within a category, there could be numerous platforms in skills management. A resource can be rated individually for each of those platforms. Platforms can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Problem Code	Within a category in skills management, there could be numerous problem codes. A resource can be rated individually for each of those problem codes. Problem Codes can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Product	Within a category in skills management, it is possible to have numerous products. A resource can be rated individually for each of those products. A product can be sub-divided into components. Products can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Resource	A resource is the basic element of the Resource Manager and is defined as people, places and things.

Resource Manager Terms and Definitions

Term	Description
Resource Category	There are five types of resources: Party, Employee, Partner, Supplier Contact, To Be Hired (TBH), and Other.
Skills Management	Skills Management provides the ability to add a new skill rating to a resource. The resource can update and maintain their skill rating, attach a numeric value to each skill level, and change the actual name of each skill level.
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Supplier resources can be imported as resources from the Purchasing (PO) application.
Workflow	Oracle Workflow automates and continuously improves business processes, routing information of any type according to business rules you can change. Oracle Workflow manages business processes according to rules that you define. The rules, which we call a workflow process definition, include the activities that occur in the process and the relationship between those activities. An activity in a process definition can be an automated function defined by: ■ a PL/SQL stored procedure or an external function ■ a notification to a user or role that they may request a response ■ a business event ■ a subflow that itself is made up of many activities.

What are Resources?

The following table describes all five resource categories used in the Resource Manager.

Resource Category Descriptions

Resource	Description
Employee	An employee is a person who has been hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Supplier resources can be imported as resources from the Purchasing (PO) application.

Resource Category Descriptions

Resource	Description
Party	A party is an entity that can enter into a business relationship. A party resource can be imported as resources from Accounts Receivables.
Partner	A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits. A Partner resource can be imported as resources from Accounts Receivables.
Other/TBH	Other/TBH is the only resource that is created and not imported. Use this resource to create a salesperson that is going to be hired (TBH) but is not yet an employee.

Roles versus Role Types

A role may encompass one or more job description and title. You assign seeded roles to resources, resource groups and resource teams. For example, the seeded roles for Sales include manager, administrator, approver, and representative. The seeded roles for Telesales include manager, administrator, and agent. You can define custom roles for your business needs.

A role type is a collection of roles associated with a particular CRM module. For example, Sales, Telesales, Marketing, Sales Compensation, Support, Call Center are all role types. Role types are seeded by the different modules that access the Resource Manager. You can define custom role types for your business needs.

Role attributes are associated with each role, and define its responsibility within the group. Values include:

- Manager
- Admin
- Lead
- Member

In addition to these four responsibilities, a role attribute can also be designated as (currently) active, and seeded (available out-of-the-box).

The following table lists example role types, and the seeded roles associated with each along with their attributes.

Example Roles, Role Attributes, and Role Types

Role Type	Seeded Roles	Role Attribute
Sales	■ Manager ■ Administrator ■ Approver ■ Representative	■ Manager, Active, Seeded ■ Admin, Active, Seeded ■ Member, Active, Seeded ■ Member, Active, Seeded
Telesales	■ Manager ■ Administrator ■ Agent	■ Manager, Active, Seeded ■ Admin, Active, Seeded ■ Member, Active, Seeded

See Also

- Understanding Groups
- Understanding Teams

Understanding Groups

The following concepts are useful in understanding the groups function in the Resource Manager.

Resource Groups

A group is based on the similar functionality or the roles of its members. It can consist of individual resources and groups. For example, Linda’s group includes individual resources, John, Mark, and Carol, as well as another resource group, Mary’s group. A resource can belong to one or many groups at one time.

Group Member Roles

Roles and responsibilities are commonly associated with all members of a resource group, but not all group roles need to be filled. For example, a sales group has one sales manager and a few sales representatives. The sales manager and the sales representative are job roles assigned to the group members.

Each member can have multiple roles defined within a group. For example, Mid West Sales Group consists of only two people due to resource constraints, one of them plays two roles, sales manager and field sales agent, at the same time.

Group Roles

Multiple roles can be assigned to a resource group. For example, Group A has three resources (an employee, a Party, and a Partner). Those three resources play a role in Group A, even if they have different roles assigned to them individually. The Party can have an individual Team role but the role it plays in group A is Manager role.

Determining Group Hierarchy

Individual resources can be assigned to a group, and a group can belong to another group or to multiple groups. Resources therefore can be organized through a group hierarchy with a parent-child relationship.

For example, Jack William and Frank Nelson are sales representatives who belong to the Product A group and directly report to Pat Smith, the Sales Manager of Product A. However, Jack and Frank indirectly report to Jeff Walsh who leads the Field Sales Group as Field Sales Manager. The Field Sales Group and the Product A group have a parent-child relationship. You can use the group hierarchy to view direct reporting or all reporting information for a resource. Refer to the Viewing Group Hierarchy section of this manual for more detailed information.

Understanding Teams

The following concepts are useful in understanding the Teams function in the Resource Manager.

Resource Teams

A team is a collection of cross-functional resources. Team members are chosen for their availability and qualifications. You define a team to organize the necessary resources to accomplish an objective or a particular task. Teams consists of groups and individual resources that work together to efficiently complete a project. A resource can belong to multiple resource teams. For example, a solution team can have support and sales groups as well as a telesales agent as an individual resource.

Team Member Roles

Each team member, whether it is an individual resource or a resource group can have multiple roles assigned to a team. For example, a team member can have both Sales Manager and Sales Representative roles due to resource constraints in a team.

Team Roles

You can assign multiple roles to a team. For example, a solution team plays a support manager role, and a sales approver role at the same time while sales demand is strong.

What is a Salesperson?

A salesperson is any person involved in the sale or support of products and services. Salespeople are typically field personnel, but can also be support groups and other product specialists involved either directly or indirectly in generating revenue for the organization.

Depending on their relationship to the sales organization, salespeople can be internal employees or external people or organizations. Employees, Parties, Partners, and Supplier Contacts can all be further defined as salespeople by having sales numbers and relevant information assigned to them after being imported to the Resource Manager. However, these imported resources always carry their original resource categories of Employee, Party, Partner, or Supplier Contact. These resource categories never change.

For example, your company partners with Vision Enterprises to promote certain products. Vision Enterprises can be imported as category “Partner” from Accounts Receivables and be given a sales number and relevant information, thus Vision Enterprises becomes a salesperson and can be assigned to your group or team, still with the same category “Partner”, for marketing campaign or opportunities.

In addition to imported resources, the only resources you can create, and not import, is a salesperson with resource category of OTHER, or TBH.

HTML Window Descriptions

The following employee resource windows are available in the HTML version of Resource Manager.

- Employees
- Advanced Search

- Resource Detail
- Resource Detail Administrator
- Resource Detail Read-only
- Resource Detail Confirmation
- Create An Employee Resource
- Define Resource Fields for Update
- Create Group
- Group Details
- Group Hierarchy
- Parent - Child Group Hierarchy
- Skill
- Rate Skill
- Define Skill Level

Employees

The following table describes field descriptions in the Employee window.

Employee Window Description

Field label	Field Type	Description
Preferred Name	Hyperlink	Click this link to access the details for the resource selected.
Employee Number	Text Field	This read-only text field displays the employee number for the resource.
Job Title	Hyperlink	Click this link to access the organization window.
Work Phone	Text Field	This read-only text field displays the phone number for the resource.
Email	Hyperlink	Click this link to send an email message to the resource.
Manager	Text Field	This read-only text field displays the manager name for the resource.

Employee Window Description

Field label	Field Type	Description
Quick Find	Drop-down	Use the drop-down list to select search criteria for an employee resource.
Quick Find Value	Text Field	Enter the search value for the search or enter % in the text field to search all employee resources. There must be a minimum of three characters entered for the search.
Go	Button	Click this button to execute the search based upon the criteria chosen in the Quick Find field. The Results appear in the Resource Summary window.
Advanced	Hyperlink	Click this link to access the Advanced Search window.

Advanced Search

The following table describes field descriptions in the Advanced Search for Employees window.

Advanced Search Window Description

Field label	Field Type	Description
First Name	Text Field	Enter a partial or complete first name for the search in the text field. This field is case insensitive.
Last Name	Text Field	Enter a partial or complete last name for the search in the text field. This field is case insensitive.
Username	Text Field	Enter a complete or partial username for the search in the text field. This field is case insensitive.
Email	Text Field	Enter a complete or partial email address for the search in the text field. This field is case sensitive.
Resource Number	Text Field	Enter a resource number for the search in the text field.

Advanced Search Window Description

Field label	Field Type	Description
Employee Number	Text Field	Enter an employee number for the search in the text field.
Job Title	Text Field	Enter a partial or complete title for the search in the text field. This field is case insensitive.
Manager Name	Text Field	Enter the manager’s name for the search in the text field.
Go	Button	Click this button to look up a manager’s name. Once selected, the manager name populates the field.
Work Phone	Text Field	Enter the partial or complete phone number for the search in the text field.
Salesrep Number	Text Field	Enter a salesrep number for the search in the text field.
Search	Button	Click this button to execute the search and access the search results in the Resource Detail window.
Restore	Button	Click this button to refresh the window and revert back to the original values.

Resource Detail

The following table describes field descriptions in the Resource Detail window.

Resource Detail Window Description

Field label	Field Type	Description
Resource	Text Field	This read-only text field displays the name of the selected resource.
Update	Button	Click this button to update personal information.
Restore	Button	Click this button to refresh the window and revert back to the original values.

Resource Detail Window Description

Field label	Field Type	Description
Preferred Name	Text Field	Enter or update the preferred name. Depending upon the administration set up, you can update the resource name in one of four ways: ▪ No update/read-only ▪ Update with an FYI notification only ▪ Update with an approval workflow ▪ Update with no notification or workflow required
Job Title	Text Field	This read-only text field displays the resource title, which comes from HR.
Email	Text Field	Enter the email address. No validation is performed on the email address.
Work phone	Text Field	Enter the work phone number in any format.
Email Category	Text Field	This read-only text field displays the resource category.
Username	Text Field	This read-only text field displays the username for the resource.
Salesperson Number	Text Field	This read-only text field displays the salesrep number for the resource.
Sales Credit Type	Text Field	This read-only text field displays the sales credit type for the resource.
Start Date	Text Field	This read-only text field displays the start date for the resource.
End Date	Text Field	This read-only text field displays the end date for the resource.
Employee Number	Text Field	This read-only text field displays the employee number.
Resource Number	Text Field	This read-only text field displays the Resource Number.

Resource Detail Window Description

Field label	Field Type	Description
Work Address	List of Values	Use the list of values to select another work address location.
Office	Text Field	Enter your office number.
Mailstop	Text Field	Enter your mailstop number.
Location	Text Field	Enter your office location.
Manager	Hyperlink	Click this link to view the resource manager's details.
Role Type	Text Field	This read-only text field displays the role types for the assigned resource.
Role	Text Field	This read-only text field displays the roles that have been assigned to the resource.
Start Date	Text Field	This read-only text field displays the start date of the role.
End Date	Text Field	This read-only text field displays the end date of the role.
Group Name	Text Field	This read-only text field displays the name of the group to which the selected member belongs.
Role Type	Text Field	This read-only text field displays the role types for the roles that are assigned to the assigned resource for this group.
Role	Text Field	This read-only text field displays the roles that have been assigned to the resource for this group.
Start Date	Text Field	This read-only text field displays the start date of the role played for the particular group shown.
End Date	Text Field	This read-only text field displays the end date of the role played for the particular group shown.
Show All History	Button	Click this button to access the window that details the complete list of groups the user has belonged to in the past.

Resource Detail Administrator

The following table describes field descriptions in the Resource Detail Administrator window.

Resource Detail Administrator Window Description

Field label	Field Type	Description
Resource	Text Field	This read-only text field displays the name of the resource.
Update	Button	Click this button to save changes made to the resources personal information.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Preferred Name	Text Field	Enter or update the preferred name. Depending upon the Administration set up, you can update the resource name in one of four ways: ■ No update or read-only ■ Update with an FYI notification only ■ Update with an approval workflow ■ Update with no notification or workflow required
Job Title	Text Field	Enter or edit the title for the resource selected.
Email	Text Field	Enter or edit the email address. No validation is performed on the email address.
Work Phone	Text Field	Enter or edit the work phone number in any format they choose.
Email Category	Drop-down	This read-only field displays the resource category. Categories can include: employee, party, partner, other, to be hired, and supplier vendor.

Resource Detail Administrator Window Description

Field label	Field Type	Description
Username	Text Field	Enter or edit the username. Validation occurs on the update/save to ensure that no duplicate usernames are created.
Salesperson Number	Text Field	Enter or edit the salesrep number for the selected resource. Validation occurs on the update and save action to ensure that no duplicate salesrep numbers are created.
Sales Credit Type	Text Field	Enter or edit the sales credit type for the selected resource.
Start Date	Text Field	This text field displays the start date for the resource.
End Date	Text Field	This text field displays the end date for the resource selected.
Employee Number	Text Field	This read-only text field displays the employee number.
Resource Number	Text Field	This read-only text field displays the resource number.
Work Address	List of Values	Use the list of values to select another work address location.
Office	Text Field	Enter the office number.
Mailstop	Text Field	Enter the mailstop number.
Location	Text Field	Enter the office location.
Manager	Hyperlink	Click the manager’s name to display his or her details.
Role Type	Text Field	Enter or edit the role type for the roles that have been assigned to the resource selected. Validation occurs so that the same role can’t be played by more than one resource at the same time.
Role	Text Field	Enter or edit the roles that have been assigned to the selected resource.

Resource Detail Administrator Window Description

Field label	Field Type	Description
Start Date	Text Field	Enter the start date for the group role membership. If you add a new role, the start date defaults to the current date.
Date Picker	Icon	Click the icon to access the date picker and select the start date.
End Date	Text Field	Enter the end date for the role membership.If you are adding a new role, then the end date defaults to an open end date.
Date Picker	Icon	Click the icon to access the date picker and select the start date.
Group Name	Text Field	Enter a new group membership for the employee, or end date the current group role membership.
Role Type	Text Field	Enter or edit the role type for the roles that have been assigned to the resource selected for the group.
Role	Text Field	Enter or edit the roles that have been assigned to the selected resource for the group.
Start Date	Text Field	Enter the start date for the group role membership.The start date represents the start date for the group role membership. If you are adding a new group membership the start date defaults to the current date.
Date Picker	Icon	Enter the start date for the group role membership. If you add a new role, the start date defaults to the current date.
End Date	Text Field	Enter the end date for the group role membership which represents the end date for the group role membership. If you are adding a new group membership, then the end date defaults to an open end date.

Resource Detail Administrator Window Description

Field label	Field Type	Description
Date Picker	Icon	Enter the start date for the group role membership. If you add a new role, the end date defaults to the current date.

Resource Detail Read-only

The following table describes field descriptions in the Resource Detail Read-only window.

Resource Detail Read-only Window Description

Field label	Field Type	Description
Resource: Resource Name	Text Field	This read-only text field displays the name of the resource.
Close	Button	Click this button to close the window.
Preferred Name	Hyperlink	Click this link to view the resource details.
Title	Text Field	This read-only text field displays the title for the resource.
Email	Hyperlink	Click this link to send an email to the address provided.
Work Phone	Text Field	This read-only text field displays the work phone number.
Category	Text Field	This read-only text field displays the resource category.
Username	Text Field	This read-only text field displays the username for the resource.
Salesrep Number	Text Field	This read-only text field displays the salesrep number for the resource.
Sales Credit Type	Text Field	This read-only text field displays the sales credit type for the resource.
Start Date	Text Field	This read-only text field displays the start date for the resource.

Resource Detail Read-only Window Description

Field label	Field Type	Description
End Date	Text Field	This read-only text field displays the end date for the resource.
Employee Number	Text Field	This read-only text field displays the employee number.
Resource Number	Text Field	This read-only text field displays the resource number.
Work Address	List of Values	This read-only text field displays the employee’s work location.
Office	Text Field	This read-only text field displays the office number.
Mailstop	Text Field	This read-only text field displays the mailstop number.
Location	Text Field	This read-only text field displays the office location.
Manager	Hyperlink	Click this link to view the manager’s information in a read-only format.
Role Type	Text Field	This read-only text field displays the role type for the roles that have been assigned to the resource.
Role	Text Field	This read-only text field displays the roles that have been assigned to the resource.
Start Date	Text Field	This read-only text field displays the start date for the role.
End Date	Text Field	This read-only text field displays the end date for the role.
Group Name	Text Field	This read-only text field displays the group name.
Role Type	Text Field	This read-only text field displays the role type associated with the group.
Role	Text Field	This read-only text field displays the roles associated with the group.
Start Date	Text Field	This read-only text field displays the date when the resource became a member of the particular group.

Resource Detail Read-only Window Description

Field label	Field Type	Description
End Date	Text Field	This read-only text field displays the end date for the role played in the particular group.
Show History	Button	Click this button to display the complete history of the group memberships for the resource in read-only format.

Resource Detail Confirmation

The following table describes field descriptions in the Resource Detail Confirmation window.

Resource Detail Confirmation Window Description

Field label	Field Type	Description
Resource Detail for <name> Updated Successfully	Text Field	This read-only text field displays the name of the resource whose information was just updated and serves as a confirmation that the update was successful (pending approvals / notifications, if required).
Close	Button	Click this button to close the confirmation window and return to the Resource Detail window.

Create An Employee Resource

The following table describes field descriptions in the Create An Employee Resource window.

Create An Employee Resource Window Description

Field label	Field Type	Description
Resource: Resource Name	Text Field	This read-only text field displays the name of the resource.

Create An Employee Resource Window Description

Field label	Field Type	Description
Create	Button	Click this button to save the resource information. Once you click the button, a confirmation window displays detailing the new resource and employee number.
Last Name	Text Field	Enter the employee's last name.
First Name	Text Field	Enter the employee's first name.
Middle Name	Text Field	Enter the employee's middle name.
Username	Text Field	Enter a username for the employee. Validation occurs upon update to ensure that no duplicate usernames are created.
Work Phone	Text Field	Enter the employee's work phone number.
Title	Drop-down	Use the drop-down list to select a personal title for the employee. Option include: Mr., Mrs., Ms., and Dr..
Job Title	List of Values	Select a job title from the list of values.
Go	Button	Click this button to search for a job title.
Email	Text Field	Enter the employee's email address. No validation occurs on the email address.
Category	Text Field	This read-only text field displays the resource category "Employee".
Start Date	Text Field	Enter the start date for the employee.
Date Picker	Icon	Click the icon to access the date picker and select the start date. The date automatically populates into the start date field for the group membership.
End Date	Text Field	Enter the end date for the employee.

Create An Employee Resource Window Description

Field label	Field Type	Description
Date Picker	Icon	Click the icon to access the date picker and select the end date. The date automatically populates into the end date field for the group membership.
Gender	Option Button	Select the gender for the employee. Options include: male, female, and unknown. The default is male.
Salesrep Number	Text Field	Enter the salesrep number for the employee. Validation occurs upon update to ensure that no duplicate salesrep numbers are created.
Sales Credit Type	Drop-down	Use the drop-down list to select the sales credit type for the employee.
Work Address	Drop-down	Use the drop-down list to select work address location.
Mailstop	Text Field	Enter the employee's mailstop number.
Office	Text Field	Enter the employee's office number.
Location	Text Field	Enter the employee's office location.
Manager	Text Field	Enter the employee's manager name.
Go	Button	Click this button to look up the manager's name. Once selected, the manager's name populates the field.

Define Resource Fields for Update

The following table describes field descriptions in the Define Resource Fields for Update window.

Define Resource Fields for Update Window Description

Field label	Field Type	Description
Field Name	Text Field	This read-only text field displays the name of the field in the Resource Detail window, determining the update status.

Define Resource Fields for Update Window Description

Field label	Field Type	Description
Full Update	Text Field	This read-only text field displays a particular field allowable for update by anyone at any time without any notification or approval. Upon selecting this option button, you can specify that the particular field can be updated by anyone at any time without sending any notification or approval message to anyone.
Update with Notification	Text Field	This read-only text field displays a particular field allowable for update by anyone at any time with an FYI notification being sent. Upon selecting this option button, you specify that the particular field can be updated by anyone at any time when sending an FYI notification. Notification is sent to the appropriate manager.
Update with Approval	Text Field	This read-only text field displays a particular field allowable for update by anyone at any time as long as that individual obtains a manager's approval. Upon selecting this option button, you specify that the particular field can be updated by anyone as long as that individual obtains an approval.
No Update	Text Field	This read-only text field displays a particular field not allowed for update. Upon selecting this option button, you specify that the particular field cannot be updated at any time by anyone.
Preferred Name	Option Button	Select the option button to determine the update status for this field. This allows resources to enter and maintain their full name information.
Resource Address	Option Button	Select the option button to determine the update status for this field. Resources can enter and maintain their work address information.

Define Resource Fields for Update Window Description

Field label	Field Type	Description
Work Phone Number	Option Button	Select the option button to determine the update status for this field. Resources can enter and maintain their work phone information.
Email Address	Option Button	Select the option button to determine the update status for this field. Resources can enter and maintain their email address information.
Update	Button	Click the button to save changes made to your preferences.
Restore	Button	Click this button to refresh the window and revert back to the original values.

Group Summary Window

The following table describes field descriptions in the Group Summary window.

Group Summary Window Description

Field label	Field Type	Description
Create	Button	Click this button to access the Create Group window and create a new group.
Group Name	Hyperlink	Click this link to view the groups details.
Description	Text Field	This read only text field is the description of the group.
Start date	Text Field	This read only text field displays the start date of the group.
End Date	Text Field	This read-only text field displays the end date of the group.
Parent	Hyperlink	Click this link to view the group’s parent information.
Child	Hyperlink	Click this link to view the group’s child information.

Create Group

The following table describes field descriptions in the Create Group window.

Create Group Window Description

Field label	Field Type	Description
Name	Text Field	Enter the name of the group in the text field.
Description	Text Field	Enter the description of the group in the text field.
Start Date	Text Field	Enter the start date of the group in the text field.
Date Picker	Icon	Click this icon to select a start date.
End Date	Text Field	Enter the end date of the group in the text field.
Date Picker	Icon	Calcite this icon to select an end date.
Parent	Text Field	Enter the parent of the group in the text field.
Email	Text Field	Enter the email address of the group in the text field.
Usage	Drop-down	Use the drop-down list to select a usage for the group.
Category	Drop-down	Use the drop-down to select a category for the group.
Resource Name	Text Field	Enter the resource name associated with the group in the text field.
Go	Button	Click this button to select a resource name.
Role Type	Drop-down	Use the drop-down list to select a role type.
Role	Text Field	Enter the role of the group in the text field.
Go	Button	Click this button to select a role.
Start Date	Text Field	Enter the start date of the group in the text field.
Date Picker	Icon	Click this icon to select an start date.

Create Group Window Description

Field label	Field Type	Description
End Date	Text Field	Enter the end date of the group in the text field.
Date Picker	Icon	Click this icon to select an end date.
Add Another Row	Button	Click this button to add another row to the table.
Create	Button	Click this button to create the group.

Group Detail

The following table describes field descriptions in the Group Detail window.

Group Detail Window Description

Field label	Field Type	Description
Group Name	Text Field	This read-only text field displays the group name.
Group Number	Text Field	This read-only text field displays the group number.
Name	Text Field	This editable field displays the group name.
Description	Text Field	This editable field displays the group description.
Start date	Text Field	This editable field displays the start date of the group.
Date Picker	Icon	Click this icon to select the start date.
End Date	Text Field	This editable field displays the end date of the group.
Date Picker	Icon	Click this icon to select the end date.
Parent	Text Field	This editable field displays the parent of the group.
Email	Text Field	This editable field displays the email address of the group.
Usage	Drop-down	Use the drop-down list to select the usage for the group.

Group Detail Window Description

Field label	Field Type	Description
Remove	Check Box	Select this check box to remove the group member role.
Category	Drop-down	Use the drop-down to select the category for the group.
Resource Name	Text Field	This editable field displays the resource name.
Go	Button	Click this button to select the resource.
Role Type	Drop-down	Use the drop-down to select the role type.
Role	Text Field	This editable field displays the role of the group.
Go	Button	Click this button to select a role for the resource.
Start Date	Text Field	This editable field displays the start date.
Date Picker	Icon	Click this icon to select the start date.
End Date	Text Field	This editable field displays the end date.
Date Picker	Icon	Click this icon to select the end date.
Update	Button	Click this button to update the information in the window.
Restore	Button	Click this button to revert to your last saved changes.
Add Another Row	Button	Click this button to add another row to the table.
Create	Button	Click this button to create a group window.

Group Hierarchy

The following table describes field descriptions in the Group Detail window.

Group Hierarchy Window Description

Field label	Field Type	Description
Group Name	Text Field	This read-only text field displays the group name.
Group Number	Text Field	This read-only text field displays the group number.
Update	Button	Click this button to update the information in the window.
Restore	Button	Click this button to revert to your last saved changes.
Delete	Button	Click this button to delete the group.
Name	Hypertext	Click this link to view the group details.
Description	Text Field	This read-only text field displays the description of the group.
Start date	Text Field	This read-only text field displays the start date of the group.
Date Picker	Icon	Click this icon to select a start date.
End Date	Text Field	This read-only text field displays the end date of the group.
Date Picker	Icon	Click this icon to select an end date.
Parent	Hyperlink	Click this link to view the parent group details.
Email	Hyperlink	Click this link to send an email message to the group.
Remove	Check Box	Select this check box to remove the parent relationship from the group.
Group Name	Hyperlink	Click this link to view the parent group details.
Go	Button	Click this button to select a parent group.
Description	Text Field	This read-only text field displays the description for the parent group.
Start Date	Text Field	This text field displays the start date of the parent group.

Group Hierarchy Window Description

Field label	Field Type	Description
Date Picker	Icon	Click this icon to select the start date.
End Date	Text Field	This text field displays the end date of the parent group.
Date Picker	Icon	Click this icon to select the end date.
Update	Button	Click this button to save your changes.
Restore	Button	Click this button to revert back to your last saved information.
Show All	Button	Click this button to view all parent relationships of the group.
Remove	Check Box	Select this check box to remove child relationships from the group.
Group Name	Hyperlink	Click this link to view the child group details.
Go	Button	Click this button to select a group.
Description	Text Field	This read-only text field displays the description of the child group.
Start Date	Text Field	This text field displays the start date of the child group.
Date Picker	Icon	Click this icon to select the start date.
End Date	Text Field	This text field displays the end date of the child group.
Date Picker	Icon	Click this icon to select the end date.
Update	Button	Click this button to update the information in the window.
Restore	Button	Click this button to revert to your last saved changes.
Add Another Row	Button	Click this button to add another row to the table.
Show All	Button	Click this button to view all child relationships of the group.

Parent - Child Group Hierarchy

The following table describes field descriptions in the Parent - Child Group Hierarchy window.

Parent - Child Group Hierarchy Window Description

Field label	Field Type	Description
Group Name	Text Field	This read-only text field displays the group name.
Group Number	Text Field	This read-only text field displays the group number.
Group Name	Hyperlink	Click this link to view the groups details.
Group Description	Text Field	This read-only text field displays a description of the group.
Start date	Text Field	This read-only text field displays the start date of the group.
End Date	Text Field	This read-only text field displays the end date of the group.

Advanced Group Search

The following table describes field descriptions in the Advanced Search for Employees window.

Advanced Search Window Description

Field label	Field Type	Description
Group Name	Text Field	Enter a partial or complete group name for the search in the text field. This field is case insensitive.
Group Email	Text Field	Enter a partial or complete email address for the search in the text field.
Group Number	Text Field	Enter a complete or partial group number for the search in the text field. This field is case insensitive.

Advanced Search Window Description

Field label	Field Type	Description
Description	Text Field	Enter a complete or partial description of the group for the search in the text field. This field is case sensitive.
Group Usage	Drop-down	Use the drop-down to select the group usage.
Active From Date	Text Field	Enter the date the group was active.
Date Picker	Icon	Click this icon to select a date.
To Date	Text Field	Enter the end date of the group.
Date Picker	Icon	Click this icon to select an end date.
Search	Button	Click this button to execute the search and access the search results in the Resource Detail window.
Restore	Button	Click this button to refresh the window and revert back to the original values.

Skills

The following table describes field descriptions in the Skills window.

Skills Window Description

Field label	Field Type	Description
Resource name	Text Field	This read-only text field displays the name of the resource.
Add New Skill	Button	Click this button to access the Rate Skill window where you can define your skills.
Name	Text Field	This read-only text field displays the name of the skill.
Level	Text Field	This read-only text field displays the level associated with the skill for the selected resource.

Rate Skills

The following table describes field descriptions in the Rate Skills window.

Rate Skills Window Description

Field label	Field Type	Description
Resource name	Text Field	This read-only text field displays the name of the resource.
Create	Button	Click this button to create the skill rating
Cancel	Button	Click this button to return to the Skills window.
Category	Text Field	Enter the category for the Skill rating.
Go	Button	Click this button to select the category.
Type	Drop-down	Use the drop-down to select a type for the skill rating.
Name	Text Field	Enter the name of the skill rating.
Go	Button	Click this button to select the name.
Component	Text Field	Only viewable when you select Product from the Type drop-down,
Level	Drop-down	Use the drop-down to select a level for the skill rating.
Create	Button	Click this button to create the skill rating
Cancel	Button	Click this button to return to the Skills window.

Define Skill Levels

The following table describes field descriptions in the Define Skill Levels window.

Define Skill Level Window Description

Field label	Field Type	Description
Update	Button	Click this button to update the information in the window.

Define Skill Level Window Description

Field label	Field Type	Description
Restore	Button	Click this button to revert to your last saved changes.
Level name	Column Name	This column displays the skill level name.
Numeric Value	Column Name	This column displays the numeric value of the skill.
Not Applicable	Text Field	This text field displays the skill level not applicable.
Expert	Text Field	This text field displays the skill level expert.
Experienced	Text Field	This text field displays the skill level Experienced.
Knowledged	Text Field	This text field displays the skill level knowledged.
Functional	Text Field	This text field displays the skill level functional.
Basic	Text Field	This text field displays the skill level Basic.
0	Text Field	This text field displays the Not Applicable skill level’s numeric value.
20	Text Field	This text field displays the Expert skill level’s numeric value.
40	Text Field	This text field displays the Experienced skill level’s numeric value.
60	Text Field	This text field displays the Knowledged skill level’s numeric value.
80	Text Field	This text field displays the Functional skill level’s numeric value.
100	Text Field	This text field displays the Basic skill level’s numeric value.

Define Skill Level Window Description

Field label	Field Type	Description
Update	Button	Click this button to update the information in the window.
Restore	Button	Click this button to revert to your last saved changes.

Resource Manager Rules for HTML

Resource Manager has several rules it follows for security purposes:

- The logged in user can only modify his or her information.
- A user can not update their own job title.
- A manager of a group cannot change their directs personal information.
- An administrator can change any resources personal information.
- Group Hierarchy is the ability to alter the group structure.
  - A member of a group who has a role within that group and the role type of admin can update the group hierarchy.
  - A member of a group who has a role within that group and the role type of admin can edit group structure of the child groups of the parent group where they have this role.
  - A manager of a group who has a role within that group and the role type of admin or manager can update the group hierarchy.
  - A manager of a group who has a role within that group and the role type of admin or manager can edit group structure of the child groups of the parent group where they have this role.
- Skills Management is the ability to rate resources based on their skill level.
  - Only positive integers are acceptable for skill ratings.
  - No two skill ratings can have the same numeric value.
  - You cannot change the numeric value of the category N/A.
  - Skill rating names are editable for specific business needs.
  - No two skill ratings can have the same name.

  - A resource's manager cannot add or modify new skill levels to their subordinates.
  - Any user can view a resource's skill rating.
- Web Availability is the ability for a resource to make their status web available or unavailable.
  - Only the logged in resource can make their status available or unavailable.

Resource Manager Process Flow

The following table describes the order and process of using, administering and implementing and using the Task Manager.

Resource Manager Process Flow

Steps	Description	Required	Performed By
Viewing Your Personal Information	Use the Resource Manager to view your personal information.	Optional	All User
Defining Your Personal information	Use the Resource Manager to update your personal information.	Optional	All User
Viewing Your Organizational Structure	Use the Resource Manager to view your organizational structure, including your manager and subordinates.	Optional	All User
Defining Your Skill Rating	Use the Resource Manager to define your skill rating.	Optional	All User
Viewing a Resource's Skill Rating	Use the Resource Manager to view a resource's skill rating.	Optional	All User
Searching for Resources	Use the Resource Manager to search for a resource.	Optional	All User
Viewing Your Group Membership Information	Use the Resource Manager to view your group membership information.	Optional	All User
Defining Your Group Membership Information	Use the Resource Manager to define your group membership information.	Optional	All User
Defining Group Hierarchy	Use the Resource Manager to define group hierarchy.	Optional	All User

Resource Manager Process Flow

Steps	Description	Required	Performed By
Importing Resources	Use the Resource Manager to import resources.	Yes	System Administrator
Defining a Salesperson	Use the Resource Manager to define a salesperson	Yes	System Administrator
Defining Resource Groups	Use the Resource Manager to define resource groups.	Yes	System Administrator
Defining Dynamic Groups	Use the Resource Manager to define dynamic groups.	Yes	System Administrator
Viewing Role Types	Use the Resource Manager to view role types.	Optional	System Administrator
Viewing Roles and Role Attributes	Use the Resource Manager to view roles and role attributes.	Optional	System Administrator
Defining Resource Teams	Use the Resource Manager to define resource teams.	Yes	System Administrator
Running Concurrent Programs	Use the Resource Manager to run concurrent programs.	Optional	System Administrator
Running a Group Audit Report	Use the Resource Manager to run a group audit report.	Optional	System Administrator
Viewing an Audit Report	Use the Resource Manager to view a group audit report.	Optional	System Administrator
Running a Group Structure Report	Use the Resource Manager to run a group structure report.	Optional	System Administrator
Viewing a Group Structure Report	Use the Resource Manager to view a group structure report.	Optional	System Administrator
Create an Employee Resource	Use the HTML Resource Manager to create an employee resource.	Yes	System Administrator
Creating a Group Resource	Use the HTML Resource Manager to create a group resource.	Yes	System Administrator
Defining Resource Fields for Update	Use the HTML Resource Manager to define whether a notification is sent to the employee resource if their personal information is modified.	Optional	System Administrator
Assigning a Numeric Value to a Skill Rating	Use the Resource Manager to assign a numeric value to a skill rating.	Optional	System Administrator

Resource Manager Process Flow

Steps	Description	Required	Performed By
Changing the name of a Skill Rating	Use the Resource Manager to change the name of a skill rating.	Optional	System Administrator
Defining Role Types	Use the Resource Manager to define role types for resources.	Yes	Implementor
Defining Resource Roles	Use the Resource Manager to define resource roles.	Yes	Implementor
Setting System Profile Options	Use the Resource Manager to set profile options for the system.	Optional	Implementor
Workflows in Resource Manager	Set up the workflow to send notifications to employee resources who update their information in HTML.	Yes	Implementor

Using Resource Manager

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser. Ensure that you are viewing the correct information for your software.

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

- HTML tools for Employee Resources
  - Viewing Your Personal Information
  - Defining Your Personal Information
  - Viewing Your Organizational Structure
  - Defining your Skill Rating
  - Viewing a Resource’s Skill Ratings
- Searching for Resources
  - Using the Quick Find Search
  - Initiating an Advanced Search for an Employee
  - Initiating an Advanced Search for a Group

- HTML tools for Group Resources
  - Viewing Your Group Membership Information
  - Defining Your Group Membership Information
  - Defining Group Hierarchy
  - Viewing Your Group Membership History

Viewing Your Personal Information

Perform the following steps to view your personal information.

Note: Click the People tab to return to the Employee summary window.

Prerequisites

None

Steps

1. After you log into the Resource Manager, the Employee's window opens with your employee details. The information that appears is based on the user login.
2. Click your preferred name.

   The Resource Detail window opens with your personal information.

See Also

- Defining Your Personal Information
- Viewing Your Organizational Structure

Defining Your Personal Information

Perform the following steps to define your personal information.

Note: Click the People tab to return to the Employee summary window.

Prerequisites

None

Steps

1. After you log into the Resource Manager, the Employee's window opens with your employee details. The information that appears is based on the user login.
2. Click your preferred name.

   The Resource Detail window opens.
3. (Optional) Update your preferred name.
4. Enter your personal information:
   a. Enter search criteria for your Job Title (at least three characters) and click **Go** to search for matching titles.

      The Select a Job Title window opens.

   b. Click your job title to populate the field.

   c. Enter your work phone number in any format, for example 555.5555 or 555-5555.

   d. Enter your email address.

      No validation is made to determine if the email address is correct or even exists.

   e. By default, the username you are currently logged in as appears in the drop-down.

   f. Your salesperson number appears in the text field.

   g. Use the drop-down list to select a sales credit type.

      The category (Employee), employee number, and resource number are automatically displayed.
5. Enter your location information.
   a. Use the drop-down to select your work address.

   b. Enter your office number.

   c. Enter your mailstop.

   d. Enter your office location.

6. Your manager's name appears in the window.
7. Enter group membership information.
   a. Enter search criteria for the group name (at least three characters) and click **Go**.

      The Select a Group window opens.
   b. Click the group to populate the field.
   c. Use the drop-down list to select the role type.
   d. Enter search criteria for a role (at least three characters) and click Go.

      The Select a Role window opens.
   e. Click the role to populate the field.
   f. Enter the start date in the following format (24-Jul-2001) or click the **Date Picker** to select a date.
   g. Enter the end date in the following format (24-Jul-2001) or click the **Date Picker** to select a date.
   h. Click the **Remove** icon to clear the row so you can reenter your information.
   i. Click **Show History** to view the group membership history.
8. Click **Update** to save your information or click **Restore** to reset the original values in the window.

See Also

- Viewing Your Personal Information
- Viewing Your Organizational Structure

Viewing Your Organizational Structure

Perform the following steps to view the organizational structure of a resource.

Note: Click the People tab to return to the Employee summary window.

Prerequisites

None

Steps

1. After you log into the Resource Manager, the Employee's window opens with your employee details.
2. Click your Job Title.

   Your organizational structure, including information about you and your manager, appears in the window.

See Also

- Viewing Your Personal Information
- Defining Your Personal Information

Defining your Skill Rating

Using Skills Management, a resource can maintain their skill rating at various levels including category, product, platform, and problem code. These ratings are used by customer support teams to select the best resource to assign to a service request. Perform the following steps to rate the resource skill at the category level.

Prerequisites

None

Steps

1. After you log into the Resource Manager, the Employee's window opens with your employee details.
2. Click on your preferred name.

   The Resource Details window opens.
3. Click **Skills** on the side navigation bar.

   The Skills window opens.
4. Click **Add New Skill**.

   The Rate Skill window opens.
5. Click **Go** next to the Category text field.

   The Select a Category window opens.
6. Click the category you want to use.

The information automatically populates the text field and you are returned to the Skills window.

7. Use the drop-down list to select a Type. Options include: Platform, Problem Code, or Product.
8. Click **Go** next to the Name text field.

   Depending on the type you selected, one of three windows will appear: The Select a Platform window, the Select a Problem Code Window, or the Select a Product window opens.
9. Click the choice you want to use.

   The information automatically populates the text field and you are returned to the Skills window.
10. If you select Product:
    a. Click **Go** next to the Component text field.

       The Select a Component window opens.
    b. Select the component you want to use.

       The information automatically populates the text field and you are returned to the Skills window.
11. Use the drop-down list to select your Skill Level. Options include: Not Applicable, Expert, Experienced, Knowledged.
12. Click **Create**.

    The new skill is added to the Skills window.

Viewing a Resource’s Skill Ratings

Any logged in resource can view another resource’s skill ratings. Perform the following steps to view a resource’s skill rating.

Prerequisites

None

Steps

1. After you log into the Resource Manager, the Employee’s window opens with your employee details.

2. Search for the resource whose skill rating you want to view.
3. Click the resource's preferred name.

   The Resource Details window opens.
4. Click **Skills** on the side navigation bar.

   The Skills window opens with a list of skills and ratings.
5. Click the skill to view its details.

Using the Quick Find Search

Use the quick find search to find your resources. Perform the following steps to execute a search.

Prerequisites

None

Steps

1. Using the Quick Find drop-down list, select search criteria:
   - Employees
   - Groups
2. Enter a keyword or character for the search (at least three characters). To search for all groups, enter "%%%" and click **Go**.

   The Search Results window opens with a list of resources containing the specified character.
3. Click any item to display the details.

See Also

- Initiating an Advanced Search for an Employee
- Initiating an Advanced Search for a Group

Initiating an Advanced Search for an Employee

Perform the following steps to search for an employee resource.

Prerequisites

None

Steps

1. From the Employee window, click **Advanced Search**.

   The Advanced Search window opens.

2. Enter as much information as possible for your search criteria. Fields include:

   - First name
   - Last Name
   - Username
   - Email
   - Resource Number
   - Employee Number
   - Manager Name
   - Job Title
   - Work Phone
   - Salesperson Number

3. Click **Search**.

   The Employees window opens with a list of resources that match your search criteria.

4. Click the Preferred Name to view the resource's details.
5. Click the Job title to view the organizational structure.
6. Click the resources email address to send them an email.

See Also

- Using the Quick Find Search
- Initiating an Advanced Search for a Group

Initiating an Advanced Search for a Group

Perform the following steps to search for a group resource.

Prerequisites

None

Steps

1. Click **Groups** on the main navigation bar.

   The Groups window opens.

2. Click **Advanced Search**.

   The Advanced Search window opens.

3. Enter as much information as possible for your search criteria. Fields include:

   - Group Name
   - Group Email
   - Group Number
   - Description

4. Use the drop-down list to select a group usage.
5. Enter the Active From Date or use the **Date Picker** icon to select a date. The date should use the following format: 24-Jul-2001.
6. Enter the To date or use the **Date Picker** icon to select a date. The date should use the following format: 24-Jul-2001.
7. Click **Search**.

   The Group window opens with a list of groups that match your search criteria.

8. Click any link to view the Group Details window.

See Also

- Using the Quick Find Search
- Initiating an Advanced Search for an Employee

Viewing Your Group Membership Information

Perform the following steps to view your group membership information.

Prerequisites

None

Steps

1. After you log into the Resource Manager, the Employee's window opens with your employee details.
2. Click your preferred name.

   The Resource Detail window opens with your personal information.
3. Click **Groups** on the main navigation bar.

   The Groups window opens with a list of groups that you are currently a member.

See Also

- Defining Your Group Membership Information
- Defining Group Hierarchy
- Viewing Your Group Membership History

Defining Your Group Membership Information

Perform the following steps to define your group membership information.

Note: You should not modify an HTML Calendar in the Resource Manager or add either Calendar Group usages (PUBLIC CALENDAR or HTML GROUP CALENDAR) to a new or existing Resource Manager Group.

Prerequisites

None

Steps

1. With the Group Detail window open, click **Show History** in the lower portion of the window.
2. In the Group Usages region, use the drop-down list to select the usage.
3. In the Members region, use the drop-down list to select a resource category. Options include: Employee, Other, Partner, Party, Supplier Contact, and To Be Hired.

4. Enter at least three characters or enter "%%%" to search all resources and click **Go**.

   The Select a Resource window opens.

5. Click the resource to populate the field.

6. Use the drop-down list to select a Role Type.

7. Enter at least three characters or enter "%%%" to search all roles and click **Go**.

   The Select a Role window opens. The roles that appear in the window correspond with the role type you selected. Check marks in the table cells define role responsibility.

8. Click the role to populate the field.

9. Enter the start (which defaults to the current date) and the end dates in the specified field or click the **Date Picker** icon to select a date. The date format must be in the following format: 28-Jul-2001.

10. Click **Update** to save your changes.

See Also

- Viewing Your Group Membership Information
- Defining Group Hierarchy
- Viewing Your Group Membership History

Defining Group Hierarchy

Perform the following steps to define your group hierarchy information.

Note: If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.

Note: A person in a group with the role of Manager or Admin can change his or her role and group hierarchy information but not phone or address information.

Prerequisites

None

Steps

1. With the Group Detail window open, click **Hierarchy** in the side navigation bar.

   The Group Detail Child and Parent Groups window opens. The name, description, start date, end date, and email appear in the window (if available) in the top portion of the window.

2. Click the Group Name to view group details.
3. In the Parent Groups region, enter at least three character in the Group Name field or enter "%%%" to search all roles and click **Go**.

   The Select a Group window opens.

4. Click the group to populate the group name and description.
5. Enter the start date (which defaults to the current date) and the end date in the specified field or click the **Date Picker** icon to select a date. The date format must be in the following format: 28-Jul-2001.
6. In the Child Groups region, enter at least three character in the Group Name field or enter "%%%" to search all roles. and click **Go**.

   The Select a Group window opens.

7. Click the group to populate the group name and description.
8. Enter the start date (which defaults to the current date) and the end date in the specified field or click the **Date Picker** icon to select a date. The date format must be in the following format: 28-Jul-2001.

See Also

- Viewing Your Group Membership Information
- Defining Your Group Membership Information
- Viewing Your Group Membership History

Viewing Your Group Membership History

Perform the following steps to view your group membership history.

Prerequisites

None

Steps

1. With the Group Detail window open, click **Show History** in the lower portion of the window.

   The Group Membership window opens with the following end-dated history information:

   - Category
   - Resource Name
   - Role Type
   - Roles
   - Start date
   - End Date

See Also

- Viewing Your Group Membership Information
- Defining Your Group Membership Information
- Defining Group Hierarchy

Administering Resource Manager

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser. Ensure that you are viewing the correct information for your software.

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities. This section covers the following topics:

- Getting Started
- Managing Resources
  - Importing Resources
  - Finding a Resource
  - Viewing a Resource From the List
  - Defining a Salesperson
  - Defining Resource Groups
  -
  - Defining Resource Teams
  - Viewing Group Hierarchy

Getting Started

You can perform the following tasks in the Resource Manager. Typically, tasks are performed in the following order:

1. Select Import Resources from the navigator to import employees, parties, partners, and supplier contacts.
2. Select Resources from the navigator to assign role, group, and team information to resources and to define a salesperson (Other/TBH).
3. Select Groups from the navigator to define a group, assign resources to the group, and specify parent-child group relationships.
4. Select Teams from the navigator to define a team and assign resources to the team.
5. Select Dynamic Groups from the navigator to define a group based on criteria specified in SQL statements.
6. Select Group Hierarchy from the navigator to view resources reporting information.

7. Select to run Concurrent Programs.
8. Select Others from the navigator to run Group Audit and Structure reports.

All HTML tools can be used to create and manage your employee and group resources.

Importing Resources

Use Resource Manager to import a resource from a different application databases depending on the resource category you select. After selecting a resource based on its category, identify its role and eligibility dates before saving it to Resource Manager.

Employees, Parties, Partners, and Supplier Contacts can be imported into the Resource Manager from Oracle HRMS, Purchasing and Accounts Receivables, depending on the resource category you select. The only resources that you can create, but not import through the Resource window, is a salesperson with the resource category of OTHER, or TBH (to be hired). Perform the following steps to import a resource.

Prerequisites

None

Steps

1. , navigate to **Resource Manager > Maintain Resources > Import Resources**.

   The Selection Criterion window opens.
2. Select from the list of values (LOV) in the Resource Category field.
3. (Optional) Refine your resource search by selecting from the LOV in the available fields.

   Different resource categories have different search field options.
4. Click **Search**.

   The application populates the Category and Name fields in the Search Results region.
5. Choose a resource by deselecting the **Select** check boxes for the undesired resources and click **Create Resource**.

The Default Values window opens, and the application populates the Start Date field with the current date.

6. (Optional) Select an end date, managing employee, role, and role effective dates.
7. Click **OK**.

   The Selected Resources window opens displaying the resource selections.
8. Deselect the undesired resource check boxes and click **Save Resource** if you want to save a resource to Resource Manager.

   Resource importation and definition is complete.
9. If you want to further define the resource roles, groups, teams, or other details use this procedure.
   a. Click **Details**.

      The Resource window opens.
   b. Define the resource information from the tab options.
   c. Choose **File** > **Save**.

Guidelines

The Comments field in the Selected Resources window indicates whether the resource entry is a new record, duplicate record, or has a new role definition.

Finding a Resource

Use the Find Resources window to perform the following actions:

- Defining a search criteria to find one or more resource summaries
- Defining a Salesperson

Prerequisites

Create or Import a Resource

Steps

You can search for a resource on any single or combination of fields. Perform the following steps to find one or more resource summaries.

1. , navigate to **Resource Manager** > **Maintain Resources** > **Resources**.

The Find Resources window opens.

2. Choose one or more parameters upon which to search.

   Typical search parameters are:

   - Number
   - Category
   - Transaction Number
   - Name

3. Enter the required dates for the resource in the Start Date and End Date fields.

4. Click **Find**.

   The Resource Search Results window opens.

Viewing a Resource From the List

Use the Resource Search Results window to select a resource for detailed viewing.

Prerequisites

Perform a resource search before you can view the summary results.

Steps

1. Select the desired resource from the Resources list.

2. Click **Resource Details**.

   The Resource window opens. From this window, you can view or update existing resource information.

Defining a Salesperson

You can designate a resource as a salesperson in the Receivables tab. A resource designated as a salesperson in this manner is organization specific, although in general, resources are not.

Note: You can only create a resource of category Other, or TBH (to be hired), through the Resource window. If your resource is of another category, it must be imported.

If a salesperson is defined with category TBH, then this salesperson is not visible within Accounts Receivable. A Salesperson defined in this manner can be viewed **only** within CRM.

The following table describes the types of tasks that you can perform in the Resource window.

Tasks Available through the Resource Window

Task	Performing the Task
Create (define) a new salesperson of type Other or TBH	Use the following steps outlined after the table.
Update a resource definition	Modify the resource definition as desired.
View resource details	View the resource details as desired.

Prerequisites

None

Steps

Perform the following steps to create a salesperson.

1. Click **New** in the Find Resource window.

   The Resource window opens.

2. Select either TBH or Other for the Category.
3. You **must** enter a valid value for the Salesperson Number for the Saleperson to be created.
4. Enter the new salespersons name in the Name field.
5. Enter a Start Date for the new salesperson.

   You must enter at least a start date here. The end date defaults to an open end data and is optional.

6. Select the Receivables tab.

For an explanation of each tab, see the Guideline following.

a. Enter the range of dates that this salesperson is to be active.

The Date Active (start date) is a required field and defaults as the current date. However, you can change it by accessing the calendar through the list of values (LOV). If you do not enter a Date Active (end date), this salesperson is active indefinitely. The Date Active cannot precede the Start Date.

If the salesperson's status is Active but the transaction date that you enter is not within this date range, Receivables does not display this salesperson in the LOV in the Transactions window.

b. (Optional) Enter the new salespersons Email address.

c. (Optional) Enter a Geo Override value for this salesperson. This value associates the salesperson with a unique tax jurisdiction.

The Geo Override and Inside City Limits fields are available only if you have installed a sales tax vendor of type Taxware Sales/Use Tax System® or Vertex Quantum®.

If you entered a value in the Geo Override field and the tax jurisdiction for this address is within city limits, select the **Inside City Limits** check box. This check box is enabled only if your sales tax vendor is Vertex Quantum.

For additional information, see the following:

Integrating Oracle Receivables with Taxware Sales/Use Tax System, Release 11i.

Integrating Oracle Receivables with Vertex Quantum, Release 11i.

d. Check the **Active for Receivables** check box to indicate that this resource is a salesperson.

e. Enter a quota Sales Credit Type.

Oracle Order Management uses this information to determine if the sales credit for an order is a quota or non-quota amount. You can define additional sales credit types in Oracle Order Management. However, you can only assign Sales Credit Types that are of type 'Quota' to salespersons in Receivables.

f. (Optional) Enter the Accounting Flexfield for your Revenue, Freight, and Receivable Accounts.

Receivables can use this information, along with your AutoAccounting rules, to determine the revenue, freight, and receivable accounts for invoices you assign to this salesperson.

g. (Optional) Assign a territory to this salesperson.

The Territory Flexfield must be set up before an assignment is made.

h. (Optional) If you assigned a territory to this salesperson, then enter the range of dates that this territory is to be assigned to this salesperson.

The Start Date defaults as the current date, but you can change it. If you do not enter an End Date, this salesperson is active indefinitely, or as long as the territory is active.

7. (Optional) Enter more information in the other tabs to further specify the resource.

8. Choose **File > Save** to save your work.

This action populates the Resource Number field with the automatically generated resource tracking number.

Guidelines

The following table describes the tabs available in the Resource window, and describes how the tabs are used.

Resource Tab Descriptions

Tab	Description
Roles	Use this tab to view, assign, and modify information about roles and role types. The role type is the actual role a resource plays, for example, Administrator or Contractor. These roles, role types, and role attributes check boxes are defined in the Setup window. The Start Date default is the current date, and it can be modified.
Groups	Use this tab to view, assign, and modify information about groups. Groups are not necessarily one person, and a resource can belong to more than one group. The Groups tab reveals in detail which groups the resource belongs to, and the role in the group. Resources can play multiple roles in a group. Click the group name to display the group member roles if this resource has group member roles assigned. See Defining Resource Groups for details.
Teams	Use this tab to view, assign, and modify information about teams. Teams can comprise multiple groups and combinations of groups and individuals. Click the team name to view the Team Member Roles. See Defining Resource Teams for details.

Resource Tab Descriptions

Tab	Description
Service	Use this tab to define the Cost per Hour and Time Zone information. The Support Site field is not operational, and not used at this time. You define the currency type in the Compensation tab.
Interaction Center	Use this tab to view, assign, and modify the email addresses and the Agent ID numbers of resources associated with the eMail Center or Call Center modules. This tab is used primarily by the Call Center and eMail Center modules. All fields are read-only. If the resource is not associated with either center, these fields are blank. (Optional) Enter the Scripting Agent Login if the employee uses Oracle Scripting. Use the Telephony Parameters region to enter middleware configuration, parameters, and values for the agent. Which telephony parameters are required and which values to specify depend on the types of switch and CTI middleware used in the Call Center.
Compensation	Use this tab to view or define the Currency Type corresponding to the Cost per Hour listed on the Service tab.
Receivables	Use this tab to define a salesperson.
Miscellaneous	Use this tab to view personal information about the resource. The fields in this tab are read-only.

The following table describes fields located in the Receivables tab, in the Resource window, which are used to define a salesperson.

Field Descriptions for the Receivables tab in the Resource Window

Field	Description
Date Active	Enter the range of dates that this salesperson is to be active. Date Active (start date) is a required field, the Date Active (end date) is optional. If you do not enter an end date, this salesperson is active indefinitely.
Geo Override and Inside City Limits	The Geo Override value associates the salesperson with a unique tax jurisdiction. Both fields are available only if you have installed a sales tax vendor of type Taxware Sales. Oracle recommends you use Tax System or Vertex Quantu.
Accounting Flexfield	The accounting flexfield includes Revenue, Freight, and Receivable Accounts. Receivables can use this information, along with your AutoAccounting rules, to determine the revenue, freight, and receivable accounts for invoices that you assign to this salesperson.

Field Descriptions for the Receivables tab in the Resource Window

Field	Description
Territory Flexfield	If you want to assign a territory to this salesperson, then enter the range of dates that this territory is to be assigned to this salesperson. The Start Date defaults as the current date, but you can change it. If you do not enter an End Date, this territory is active for this salesperson infinitely.

Defining Resource Groups

An individual or group resource can belong to more than one group. Choose to search for an existing group or create a new group; then define the group's members, roles, usages, and relations. Perform the following steps to define a resource group.

Prerequisites

None

Steps

1. , navigate to **Resource Manager > Maintain Resources > Groups**.

   The Define Groups window opens.

2. (Optional) To find an existing resource group, use this procedure.

   a. On the application tool bar, click **View > Find**.

      The Find Group window opens.

   b. Select a group name from the list of values (LOV) in the Group Name field and click **Find**.

      The application populates the Results region with the group name search results.

   c. Select a group name in the Results table and click **OK**.

      The application populates the Define Groups window with the group information.

3. To create a new resource group, then use this procedure.

   a. Enter a group name in the Name field.

   b. Enter a brief description of the group in the Description field.

c. Enter the effective dates for the team in the Start and End fields.

4. (Optional) Select the **Exclusive Flag** check box to assign resources to this group with a particular member role and usage that is not assigned to any other exclusive group with the same member role and usage, in the same time frame.

5. In the Members tab, select a resource category and member number from the LOV in the Category and Number fields.

   The application populates the Name field with the member's name and affiliated organization.

6. (Optional) Select a member name and click one of the available buttons.

   For a detailed description of the group member button options, see the Resource Group Member Buttons table in the Guidelines section.

7. In the Roles tab, select a role type and role name from the LOV in the Role Type and Role fields.

   The roles relationship to its category is indicated by the role attributes check box selections.

8. In the Usages tab, select one or more usage descriptions from the LOV in the Usage field.

9. Choose **File > Save**.

10. Select either the Parent Group or Child Group tab depending on the relation type.

11. Select a group number from the LOV in the Group Number field of the selected tab.

    The application populates the Group Name field of the Parent Group or Child Group tab.

12. Select effective dates for the relation from the LOV in the Start and End Date fields.

13. Choose **File > Save** to save the group definition.

    The new group is accessible from the Group tab in the Resource window.

Note: If the reporting hierarchy needs to be changed, it is better to delete a group member role rather than end dating it.

Guidelines

The following table describes the Resource Group member buttons.

Resource Group Member Buttons

Button	Action
Member Details	This button opens the main Resource window and record of the member.
Move Member	This button opens the Move Member window, where you can assign the member to another group.
Member Roles	This button opens the Member Roles window, where you can define the member role type, name, and effective dates.

The following table describes the Define Group tabs.

Define Group Tab Descriptions

Tab	Description
Members	Use this tab to define the member category and member number of the group.You can also view a members details, assign the member to another group, and view a members role type in this tab.
Roles	Use this tab to define roles and role types for the group.
Usages	Use this tab to determine what CRM modules use the group.
Parent Group	Use this tab to define a group as a parent group.
Child Group	Use this tab to define a group as a child group.

See Also

Defining Resource Teams

14. Perform the following steps, navigate to

Defining Resource Teams

Team members represent a resource group, and are chosen for their availability and qualifications. Teams consist of people that work together to efficiently complete a project. Perform the following steps to define a team.

Prerequisites

You must define a resource group.

Steps

1. , navigate to **Resource Manager > Maintain Resources > Teams**.

   The Define Teams window opens.

2. (Optional) To find an existing resource team, use this procedure.

   a. On the application tool bar, click **View > Find**.

      The Find Team window opens.

   b. Select a team name from the list of values (LOV) in the Name field and click **Find**.

      The application populates the Results region with the team name search results.

   c. Select a team name in the Results table and click **OK**.

      The application populates the Define Teams window with the group information.

3. Enter a team name in the Name field.

4. (Optional) Select the **Exclusive Flag** check box to assign resources to this team with a particular member role and team usage that is not assigned to any other exclusive team with the same role and usage, in the same time frame.

5. Enter a brief description of the team in the Description field.

6. Enter the effective dates for the team in the Start and End fields.

7. In the Members tab, select a category and member from the LOV in Category, and Number fields. For a detailed description of the group member button options, see the Resource Group Member Buttons table in the Guidelines section.

   The application populates the Name field with the member's name.

8. (Optional) Click **Member Roles** to assign team member roles to a team.

9. (Optional) Select a member name and click **Member Details** to view specific member information.

10. In the Roles tab, select from the LOV in the Role Type and Role fields.

The roles relationship to its category is indicated by the role attributes check box selections.

11. In the Usages tab, select from the LOV in the Name field.
12. Choose **File > Save** to save the team definition.

    The new team is accessible from the Team tab in the Resource window.

Guidelines

The following table gives a description of the tabs located in the Define Team window.

Define Team Tab Descriptions

Tab	Description
Members	Use this tab to define members of a team.
Roles	Use this tab to define the team roles and role types.
Usages	Use this tab to determine what CRM modules use the team.

See Also

Defining Resource Groups

Viewing Group Hierarchy

Use group hierarchy to view both the subordinates and a direct manager for a specific resource. For example, you can view only those resources that report directly, or you can view all resources that report to a particular person. This feature does not identify who the manager is and who the subordinates are for this resource. You can restrict your view by resource category. Perform the following steps to view the hierarchy of a group.

Prerequisites

None

Steps

1. , navigate to **Resource Manager > Maintain Resources > Group Hierarchy**.

   The Group Hierarchy window opens.

2. Select a resource from the list of values (LOV) in the Name field and click **View** to view the groups of a particular resource member.

   The application populates the Groups region with the member's groups and effective enrollment dates.

3. Select a resource category from the Category LOV and click **View** to view the groups and members of a resource category.

   The application populates the Groups and Members regions with the group and member names and effective enrollment dates.

4. Select **All** from the Category LOV and click **View** if you want to view all the resource groups and members in the database.

   The application populates the Groups and Members regions with all the groups and their members and their effective enrollment dates.

Guidelines

Selecting **Reports Directly** from the LOV in the View By field searches the database for members that report directly to a specific resource.

See Also

- Defining Resource Teams
- Defining Resource Groups
- Importing Resources

Running Concurrent Programs

Oracle recommends that the system administrator run the concurrent programs, listed in the following table, on a regular basis, to synchronize data between the Resource Manager and following applications and maintain data integrity.

Resource Manager Concurrent Programs

Name	Parameters	Oracle Applications
Build Repeating Manager	None	N/A
Flatten Employee Hierarchy	None	Human Resources
Flatten Group Hierarchy	None	N/A
Populate Reporting Manager	None	N/A

Resource Manager Concurrent Programs

Name	Parameters	Oracle Applications
Synchronize Application username	None	FND
Synchronize Employees	**No**: Synchronize only the employees that currently exist in Resource Manager. **Yes**: Synchronize all the employees that currently exist in Resource Manager *plus* all new active employees in Human Resources that have not been imported yet.	Human Resources
Synchronize Group Denorm	None	N/A
Synchronize Parties and Partners	None	Accounts Receivable
Synchronize Repeating Manager	None	N/A
Synchronize Supplier Contacts	None	Purchasing

Note: Oracle strongly recommends that an employee, or party, or supplier contact **not** have more than one application user.

If a resource (employee, party, or supplier contact) is linked to two or more application users, and imported into Resource Manager, then one application user is selected at random and associated with that resource.

Viewing Roles and Role Attributes

A role may encompass one or more job descriptions and titles. Roles are assigned to resources, resource groups and resource teams. Each role has an attribute (responsibility) associated with it. Perform the following steps to view roles and role attributes.

Prerequisites

A role must exist before it can be viewed.

Steps

1. , navigate to **Resource Manager > Setup > Roles**.

The Roles window opens.

2. On the application tool bar, click **View > Find All**.

   Information populates the window.

3. Use the up and down arrows to move through the various role definitions.

   As the role type changes, you can also view the responsibilities associated with each role.

See Also

- Roles versus Role Types
- Viewing Role Types
- Defining Role Types

Viewing Role Types

A role type is a collection of roles associated with a particular CRM module. This could be Sales, Marketing, or Telesales, for example. Perform the following steps to view role types.

Prerequisites

A role type must exist before it can be viewed.

Steps

1. , navigate to **Resource Manager > Setup > Role Types**.

   The Application Object Library: JTF_RS_ROLE_TYPES Lookup window opens.

2. If necessary, use the scroll bar to view all the defined role types.

See Also

- Roles versus Role Types
- Viewing Roles and Role Attributes
- Defining Role Types

Running an Audit Report

Resource Manager supports the ability to run an audit report detailing changes to resources and resource groups created within a defined date. For example, any changes made to new members of a group are defined, but role change information is not. This provides an audit trail of the actions taken for specific groups, and resources. Perform the following steps to run an Audit Report.

Note: Only the movement of a resource from a given group to another group is tracked. Resources changing roles within the same group are not reported in the Audit Report.

Prerequisites

You must have System Administrator responsibility.

Steps

1. , navigate to **Resource Manager > Others > Requests > Run.**

   The Submit a New Request window opens.

2. Select the **Single Request** option button and click **OK**.

   The Submit Request window open.

3. Use the Name list of values (LOV) to select a report.

   The Reports window opens.

4. Select Group Audit Report from the list of reports and click **OK**.

   The Parameter window opens.

5. Enter parameters for the report.

   In order for an Audit Report to run successfully, it is necessary to define both Report Based On and Date Range/No. of Days for the report. The report runs based on the information you enter for the following criteria.

   - Report Based On
   - Group
   - Resource
   - Updated By
   - Date Range/No. of Days

- Start Date
- End Date
- Number of Days for

6. (Optional) Change the time frame the report is suppose to run by clicking **Schedule**.

   The Schedule window opens.

7. Select the time frame when you want the report to run:
   - As soon as possible
   - Once
   - Periodically
   - On specific days

8. Click **OK**.

9. (Optional) Click **Options** to determine who should be notified when the report is complete and where you want to print the output to.

10. Click **Submit**.

11. A dialog opens confirming your request was submitted.

See Also

- Viewing an Audit Report
- Running a Group Structure Report
- Viewing a Group Structure Report

Viewing an Audit Report

You can monitor the status of an audit report to see when it has been completed, and if it completed successfully. Perform the following steps to view an Audit report.

Prerequisites

A Group Audit Report must run successfully.

Steps

1. , navigate to **Resource Manager > Others > Requests > View.**

   The Find Requests window opens.

2. Select the **All My Requests** option button.
3. Click **Find**.

   The Requests window opens.

4. Select a Group Audit Report to view.
5. Click **View Log** to display the results of the report.

   The report details opens in an HTML window along with a log file for the report.

See Also

- Running an Audit Report
- Running a Group Structure Report
- Viewing a Group Structure Report

Running a Group Structure Report

Resource Manager supports the ability to run a Group Structure report detailing any changes made to a specific the Parent or Child relationship of a resource group. This ability provides you with a reliable audit trail of the actions taken for a specific group. Group name changes, or any resource changes within the same group, are not detailed in this report. Perform the following steps to run a Group Structure report.

Prerequisites

You must have System Administrator responsibility.

Steps

1. , navigate to **Resource Manager > Others > Requests > Run.**

   The Submit a New Request window opens.

2. Select the **Single Request** option button and click **OK**.

   The Submit Request window open.

3. Use the Name list of values (LOV) to select a report.

   The Reports window opens.

4. Select Group Structure Report from the list of reports and click **OK**.

   The Parameter window opens.

5. Select the group you want to run the report on from the list of values (LOV) and click **OK**.

6. (Optional) Change the time frame the report runs by clicking **Schedule**.

   The Schedule window opens.

7. Select the time frame when you want the report to run:

   - As soon as possible
   - Once
   - Periodically
   - On specific days

8. Click **OK**.

9. (Optional) Click **Options** to determine who should be notified when the report is complete and where you want to print the output.

10. Click **Submit**.

    A dialog opens confirming your request was submitted.

See Also

- Running an Audit Report
- Viewing an Audit Report
- Viewing a Group Structure Report

Viewing a Group Structure Report

You can monitor the status of an audit report to see when it has been completed, and if it completed successfully. Perform the following steps to view your Group Structure report.

Prerequisites

You must first run a Group Structure Report successfully.

Steps

1. , navigate to **Resource Manager > Others > Requests > View.**

   The Find Requests window opens.

2. Select the **All My Requests** option button.
3. Click **Find**.

   The Requests window opens.

4. Select the Group Structure Report.
5. Click **View Log** to display the results of the report.

   The report details opens in an HTML window along with a log file for the report.

See Also

- Running an Audit Report
- Viewing an Audit Report
- Running a Group Structure Report

Creating an Employee Resource

When you create an employee resource, the information is recorded in human resources. Perform the following steps to create an employee resource.

Prerequisites

- You must have the Resource Self Service Administrator responsibility.
- The JTFRS: Employee Update Access profile must be set to "None."

Steps

1. Log in as the administrator.
2. The Employees window opens.
3. Click **Create**.

The Create An Employee Resource window opens.

4. Enter the employee's last, first, and middle name in the specified fields.
5. Use the drop-down list to select the employee's title, for example, Miss.
6. Enter a username for the new employee.
7. Enter personal information for the employee:
   a. Enter your work phone number in any format, for example 555.5555 or 555-5555.
   b. Enter search criteria for your Job Title (at least three characters) and click **Go** to search for matching titles.

      The Select a Job Title window opens.
   c. Click your job title to populate the field.
   d. Enter your email address.

      No validation is made to determine if the email address is correct or even exists.
   e. Enter your salesperson number.
   f. Use the drop-down list to select a sales credit type.

      The category (Employee), employee number, and resource number are automatically displayed.
8. Enter your location information.
   a. Use the drop-down to select their work address.
   b. Enter your mailstop.
   c. Enter your office number.
   d. Enter your office location.
9. Enter search criteria for your manager's name (at least three character's) and click **Go**.

   The Select a Manager window opens.
10. Click your Manager's name to populate the field.
11. Click **Create**.

    The employee resource is created.

See Also

- Creating a Group
- Defining Resource Field Updates

Creating a Group

Perform the following steps to create an Group resource.

Note: If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.

Note: You should not modify an HTML Calendar in the Resource Manager or add either Calendar Group usages (PUBLIC CALENDAR or HTML GROUP CALENDAR) to a new or existing Resource Manager Group.

Note: Only one parent record can be specified for a specific period of time. However, several child records can be active at once.

Prerequisites

- You must have the Resource Self Service Administrator responsibility.
- The JTFRS: Group Update Access profile must be set to "None."

Steps

1. Log in as the administrator.
2. The Employees window opens.
3. Click **Groups** on the main navigation bar.

   The Groups window opens.
4. Click **Create**.

   The Create Groups window opens.
5. Enter the Group name.

6. Enter a description for the group.
7. Enter an email address for the group.

   No validation is made to determine if the email address is correct or even exists.
8. Enter the start (which defaults to the current date) and the end dates in the specified field or click the **Date Picker** icon to select a date. The date format must be in the following format: 28-Jul-2001.
9. Use the drop-down list to select the group usage.
10. Define the group membership information.
    a. Use the drop-down list to select a resource category. Options include: Employee, Other, Partner, Party, Supplier Contact, and To Be Hired.
    b. Enter at least three characters or enter "%%%" to search all resources.

       The Select a Resource window opens.
    c. Click the resource to populate the field.
    d. Use the drop-down list to select a Role Type.
    e. Enter at least three characters or enter "%%%" to search all roles.

       The Select a Role window opens. The roles that appear in the window correspond with the role type you selected. Check marks in the table cells define role responsibility. If you select a role with the role type of Admin or manager, the resource can edit their group hierarchy as well as the group structure of the child groups of the parent group that they are a member.
    f. Click the role to populate the field.
    g. Enter the start (which defaults to the current date) and the end dates in the specified field or click the **Date Picker** icon to select a date. The date format must be in the following format: 28-Jul-2001.
11. Click **Create**.

    The Group Detail window opens with the new group information.

See Also

- Defining Your Group Membership Information
- Creating an Employee Resource
- Defining Resource Field Updates

Defining Resource Field Updates

Perform the following steps to define field updates for a resource.

Prerequisites

You must have the Resource Self Service Administrator responsibility.

Steps

1. After you log into Resource Manager, select the Administration tab on the main navigation bar.

   The Define Resource Fields for Update window opens.

2. Modify preferences for each field by selecting the option button for the type of update you want to define. Options include:

   - Full Update
   - Update with Notification
   - Update with Approval
   - No Update

3. Click **Update**.

   The Acknowledgment window opens confirming your changes.

4. Click **Edit Details** to return to the Define Resource Fields for Update window or click the People tab to return to the Employee summary window.

See Also

- Creating an Employee Resource
- Creating a Group

Assigning a Numeric Value to a Skill Rating

Perform the following steps to assigning a numeric value to a skill rating.

Prerequisites

You must have the Resource Self Service Administrator responsibility.

Steps

1. After you log into Resource Manager, select the Administration tab on the main navigation bar.

   The Define Resource Fields for Update window opens.

2. Click **Skill Levels** on the main navigation bar.

   The Define Skill Levels window opens.

3. Enter a numeric value in the skill rating you want to modify.

4. Click **Update** to modify the information or click **Restore** to reset the original values in the window.

See Also

- Changing the Name of a Skill Rating

Changing the Name of a Skill Rating

Perform the following steps to change the name of a skill rating.

Prerequisites

You must have the Resource Self Service Administrator responsibility.

Steps

1. After you log into Resource Manager, select the Administration tab on the main navigation bar.

   The Define Resource Fields for Update window opens.

2. Click **Skill Levels** on the main navigation bar.

   The Define Skill Levels window opens.

3. Select the skills rating you want to modify and enter a new name in the text field.

4. Click **Update** to modify the information or click **Restore** to reset the original values in the window.

See Also

- Assigning a Numeric Value to a Skill Rating

Understanding Notes

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

This section covers the following topics:

- Notes Overview
- What's New in This Release
- Terms and Definitions
- Explanation of Notes Summary Window in HTML
- Notes Process Flow

Notes Overview

The following topics describe what Notes is and when and why you use it:

- What is a Note?
- Key Features of Notes
- What is a Note Type?
- Who Uses Notes?

What is a Note?

A note is a record of descriptive information that has been generated by users and can be referenced. Notes can be used from different applications in the E-Business suite to access the comment log that relates to a specific transaction.

You can only view notes that are not specified as private. A note can also have one to multiple attachments. As a default, all notes created by the resource appear on the Notes Summary window. If the Note module is accessed from other applications, all notes for that source ID and source name are shown.

In various business transactions, such as service requests, customer orders, sales, and marketing transactions, an agent or customer support representative needs to record information about the transactions performed. Notes help to categorize these business transactions.

An Example

A customer support agent enters a note for a service request. The note states that the customer is in a business meeting from 10:00 a.m. to 12 p.m. and is unavailable to assist the technician with the problem.

All of the E-Business Suite writes to the same Notes table, which can be accessed:

- Through Forms
- Through HTML

Note: Although users can use notes through forms or HTML, set up for both is still in Forms and can be accessed through the CRM Administrator responsibility.

Key Features of Notes

The following are key features of notes:

- You can capture large amounts of data, such as log files and text.
- Notes can be translated to other languages.
- Notes can be private or public.
- Note types are available to categorize business transactions such as searching for a note.
- You can attach documents (like a presentation) to a note.
- The Detailed Note window holds text notes up to 32K in size.
- Further refine your note search by entering Related To information in the Find Notes window. Selecting a match option also helps you narrow your search.

A note is free-form text attached to a CRM object, created by an agent, customer care or service representative, or end user.

For example, a note can be attached to any of the following:

- Service Requests
- Service Quotes
- Marketing Offerings
- Tasks

> **Note:** The Notes module is a stand-alone module only in HTML. However, it is commonly accessed from various applications under various responsibilities: such as, from Customer Support, Tasks, Escalations, and Installed Base.

What is a Note Type?

Note types are selected up from the lookup tables. Users can add Note Types through the setup window. They provide a categorization to the Notes based on the user’s individual needs. Also, a note type can be tied to a source type. These note types are visible only to that mapped source. Therefore, a user can choose between the entire note types that have been defined for the user’s source and those which do not have any source type attached to them.

Who Uses Notes?

Customer Support uses notes to enable an agent to log comments regarding the problem, resolution, or product.

Field Support uses notes to enable a field service representative to create a new note out in the field.

Notes can be accessed from various applications under various responsibilities: for example, from Customer Support, Tasks, Escalations, and Installed Base.

What’s New in This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for the Notes:

An HTML version of Notes has been created. This new HTML version maintains the functionality of forms-based Notes module.

Terms and Definitions

The following table describes Notes terms and definitions.

Notes Terms and Definitions

Term	Description
Attachment	An attachment is any document associated with one or more application modules. You can view attachments as you review and maintain a module. For example: operating instructions, purchase order, notes, item drawings, presentations, or an employee photo can be an attachment.
CLOB	Character Large Object
Created By	This is the person who is creating the note.
Note	This is note content (text).
Note Status	There are three statuses available for notes: Private: Only the creator can view it. Public: The creator and others can read or write to it. Publish: Publishable over the internet. Everyone can view it.
Note Text	A large type note, such as a customer’s letter or directions.
Note Type	Note types are selected up from the lookup tables. You can add note types through the setup window. They provide a further categorization to the notes based on a user’s individual needs. Also, a note type can be tied to a source type and such note types are visible only to that mapped source. Therefore, you must choose between the entire note types that have been defined for your source and those which do not have any source type attached to them.
Relate To	The related to types specifies what the note is about and is seeded. For example, a service request may be related to a customer or location. A single note can be related to multiple context types.
Source	A source is the originator of the note. For example, if the notes are entered from a service request application, then the source of the note is Service Request. Sources are pre-defined.

Explanation of Notes Summary Window in HTML

The Summary window is the main entry window for Notes. You can access the following windows from the Summary window:

- Notes Search window
- Create Note window
- All Notes window
- Note Details View window
- Attachment Summary window

The following are accessed from the Attachment Summary window and the Create Note window.

- Create Attachment window
- Attachment Details window
- Relate To window

The following table describes the fields in the Notes Summary window in HTML.

Notes Summary Window

Field	Type	Description
Search	Button	Click this button to search all notes and sort the results.
Create	Button	Click this button to create a new note.
All Notes	Button	Click this button to view all notes related to the calling application. For example, when Notes is accessed from Tasks, all of the notes associated with that particular task are displayed.
Date	Text Field	This read-only text field displays the date that the note was created.
Created By	Text Field	This read-only text field displays the name of the user who created the note. Values are captured from the user's login ID. If there is a Resource ID associated with the User ID, that value is displayed in a parenthesis. If no Resource ID is available, the value is defaulted to null.
Type	Text Field	This read-only text field displays the note type.
Status	Text Field	This read-only text field displays the note status.

Notes Summary Window

Field	Type	Description
Note	Hyperlink	Click this link to display the first 20 characters of the text in the note field.
Text	Icon	Click this icon to pop-up a large note window. The icon is not visible when there is no large note attached.
Attachment	Icon	Click this icon to view attachments associated with the note. If there is no attachment, the paperclip icon will not appear.

Notes Search Window in HTML

The Notes Search window opens when you click the Search button on the Notes Summary window. You can search all notes based on multiple criteria, as well as sort the search results. After entering the appropriate criteria into the fields and clicking Search, the results are displayed on the Notes Summary window. The following table describes the fields in the Notes Search window.

Notes Search Window

Field	Field Type	Description
Search	Button	Click this button to search for a note.
Clear	Button	Click this button to clear your search criteria.
Key Word	Text Field	Enter a partial or full word to search on in the text field. If this field is populated, the Date Range search criteria will automatically be limited to 30 days.
Source	Drop-down	Use this drop-down to select the source of the note.
Name	Text Field	Enter the name of the note in this text field.
Go	Button	Click this button to access the lookup window to search for a note.
Relate To	Drop-down	Use the drop-down list to select the relate to information to search on.
Name	Text Field	Enter the source object name to search for in the text field.
Go	Button	Click this button to access the lookup window to search for the source object.

Notes Search Window

Field	Field Type	Description
Note Type	Drop-down	Use the drop-down list to search from a list of notes types.
Created By	Text Field	Enter the name of the notes creator in the text field.
Go	Button	Click this button to access the look up window where you can search for the creator's name.
Date Range	Option Button	Select the option button to search for a particular date range.
Last_Days	Option Button	Select this option button
From Date	Option Button	Select the option button to search the date range that note was created. You are required to select the date using the date picker.
Date Picker	Icon	Click this icon to select the date from the date picker.
To Date	Text Field	Enter the date range when the note was created. You are required to use the date picker.
Date Picker	Icon	Click this icon to select the date from the date picker.
Sort Rows By	Drop-down	Use the drop-down list to select the sort options.
Then By	Drop-down	Use the drop-down list to select the sort options.
Finally By	Drop-down	Use the drop-down list to select the sort options.
Number of Rows Displayed	Text Field	Enter the number of rows that should appear on the Note Summary window.

Create New Window

When accessing Notes from other applications, such as, Tasks or Calendar, the source name and source number are passed to Notes. The information is displayed below the page title for your reference. A single note can be related to multiple contexts. A context defines what a note is about.

By default, the source is entered as a context with source type as the source name and source ID as the context type ID. You can access the following windows from the Create Note window:

- Note Summary window
- A large note

The following table describes the fields in the Create Note window.

Create Note Window

Field	Field Type	Description
Create	Button	Click this button to access the Note Details window where you can create the note.
Clear	Button	Click this button to refresh the window.
Create and Create Another	Button	Click this button to create many notes.
Type	Drop-down	Use this drop-down to select the note types. A note type can be tied to a source type and those note types are visible only to that mapped source.
Status	Drop-down	Use the drop-down to assign a status to the note. The default is Public. Status include: **Private**: only the creator of the note can read and write to the note **Public**: others can read and write to the note **Publish**: can publish on the internet for the customer to read and write to the note
Note	Text Field	Enter up to 2000 characters for the note.
More	Button	Click this button to access the large note window and enter a large note up to four GB.

All Notes Window

Use the All Notes window to view all notes associated with a source object in a non-table format. It is accessed from the Notes Summary window. The following table describes the fields in the All Notes window.

All Notes Window

Field	Field Type	Description
Note Icon	Icon	Click this icon to see the Note Details window.

Note Details Window

You can access the following from the Note Details window:

- Add Attachment

- Relate To

The following table describes the action or function of each link or button in the Note Details window.

Note Details Window

Field	Field Type	Description
Update	Button	Click this button to update the note details.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Type	Drop-down	You can classify the note by selecting from a predefined list of note types. A note type can be tied to a source type and those note types are visible only to that mapped source.
Status	Drop-down	Assign a status to note. The default is Public status. Private: only the creator of the note can read the note. Public: others can read the note. Publish: you can publish on the internet for the customer to read the note.
Note	Text Field	Enter up to 2000 characters.
More	Button	The large note window opens so you can enter a large note up to 4 GB. The note is saved when you click the Create Button.

Attachment Summary Window

The following table describes the fields in the Attachment Summary window.

Attachment Summary Window

Field	Field Type	Description
Update	Button	Click this button to update the attachment.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Add Attachment	Button	Click this button to access the Add Attachment window to create or add an attachment to an appointment.

Attachment Summary Window

Field	Field Type	Description
Remove	Check box	Select this check box to remove a username from the multi-select box. If an icon is displayed, click it to clear the row before you update the record.
Date Added	Text Field	This field displays the date that the attachment was created.
Description	Text Field	Click this link to access the Note Details window and view the first 20 characters of the attachment and drill down to the attachment details.
File Size	Text Field	This read-only text field displays the file size of the attachment.
Data Type	Text Field	This read-only text field displays the data type for the attachment. Options include: Add Existing File, Text, File or URL.
Added By	Text Field	This field displays the user's name and resource ID of the creator of the attachment.
Attachment	Hyperlink	Click this link to view the attachment whether it is (a file, a URL, or text).

Add Attachment Window

You can attach multiple attachments to the calling application. The following table describes the fields in the Add Attachment window.

Add Attachment Window

Field	Field Type	Description
Create	Button	Click this button to create a new attachment to the note.
Clear	Button	Click this button to refresh the window without saving your changes.
Description	Text Field	Enter a text message to be attached.
Text	Option Button	Select the text option button to indicate that the attachment is in a free-formed text format.
File	Option Button	Select the file option button to indicate that the attachment is a file.
File Name	Text Field	Enter the file location.

Add Attachment Window

Field	Field Type	Description
Browse	Button	Click this button to navigate to the file location.

Attachment Details Window

The following table describes the fields in the Attachment Details window.

Attachment Details Window

Field	Field Type	Description
Update	Button	Click this button to create a new attachment to the note.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Description	Text Field	Enter a text message to be attached.
Add Existing File	Option Button	Select the option button to attached file from the file repository.
Text	Option Button	Select the option button to update the text attachment.
File	Option Button	Select the option button to update the file name that is attached.

Relate To Window

The following table describes the fields in the Relate To window.

Relate To Window

Field	Field Type	Description
Update	Button	Click this button to save your information.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Type	Drop-down	Use the drop-down list to select from a list the source object type.

Notes Process Flow

The following table describes the order and process of implementing and using Notes.

Notes Process

Steps	Description	Required	Performed By
Set up Note Types	You can use either the seeded types or create additional customized types.	Yes	Implementor
Map Note Types to a Source	Mapping notes limits the visible note types for that source to the defined subset of note types.	Yes	Implementor
Set up the Source Object Code and Context	When you define a new document, you must associate Notes usage to the new document.	Yes	Implementor
Set up System Profile Options	Set up system profile options specific to your implementation needs.	Yes	Implementor
Search for a Note	Find a note.	Optional	End User
Create a Note	Create a note.	Optional	End User
Add an Attachment to a Note	You can add different types of attachments to a note.	Optional	End User

Using Notes (HTML)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser. Ensure that you are viewing the correct information for your software.

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

- Getting Started
- Searching for a Note
- Creating a Note
- Adding an Attachment
- Viewing Existing Attachments
- Creating Note Text
- Using the Relate To Function

Getting Started

Use Notes to perform the following tasks:

Logging into Notes

There are several ways to access Notes. It can be run as a standalone module but typically users access Notes from other calling applications. Most applications use Notes, but in HTML you can access Notes through HTML Tasks Manager or the Calendar module from a link on the main navigation bar.

Each module should have an individual login and display a Note tab upon access. Perform the following steps to log into Notes.

Prerequisites

You must be an employee type resource.

Steps

1. Navigate to one of the listed modules.
2. Enter your user ID.
3. Enter your password and click **Go**.
4. Click the Notes tab.

   The Note Summary window opens with a list of your current Notes.

Using the Quick Find Search

Use the quick find search to find your appointments, tasks, and notes. Perform the following steps to execute a search.

Prerequisites

None

Steps

1. Using the Quick Find drop-down list, select search criteria:
   - Appointment
   - Task
   - Notes
2. Enter a keyword or character for the search (at least three characters). To search for all groups, enter "%%%" and click **Go**.

   The Search Results window opens.
3. Click any item to display the details.

Using the Notes Summary Window

Use the Notes Summary to:

- View a list of all your notes
- Update notes
- Create a new note
- Select to display another saved search
- Display note details

The information in the Note Summary is the result of your default search query. Perform the following steps to view the Note Summary window.

> **Note:** Use the First, Previous, Next, and Last links at the bottom of the window to view all of your existing notes.

Note: If you are running Notes integrated with Sales Online (OSO), the Notes Summary and Create Notes windows are combined together onto one page.

Prerequisites

You must be the owner, assignee, or have been granted access to a note in order to view it.

Steps

1. Click **Notes** on the main navigation bar.

   The Note Summary window opens with a list of your editable Notes.

2. To view a previously saved search, select it from the Saved Searches drop-down list and click **Go**.

3. Click the note name hyperlink to view the note's details.

   The saved search appears in the window.

4. Click the paperclip icon in the Attachments column to add or update an attachment.

Viewing All Notes

You can view a list of all notes. Perform the following steps to see the All Notes View window.

Note: Use the First, Previous, Next, and Last links at the bottom of the window to view all of your existing notes.

Prerequisites

You must be the owner, assignee, or have been granted access to a note in order to view it.

Steps

1. Click **Notes** on the main navigation bar.

   The Note Summary window opens with a list of your editable Notes.

2. Click **All Notes** on the Summary window.

   The View All Notes window opens with a list of your Notes.

3. Click the **Note** icon to open the Note Details window.

Viewing Note Details

Use the Note Details window to update a note. Perform the following steps to view the details of a specific note.

Prerequisites

A note must already exist.

Note: Click the source number or name to drill down on the details of the record.

Steps

1. Click **Notes** on the main navigation bar.

   The Notes Summary window opens.

2. Click the note name to view more information about the note.

Searching for a Note

Find notes by performing a search for source number, owner, date, or note type. Perform the following procedure to find an existing note.

Note: When a note is associated with an appointment, the note will only be visible in the context of that appointment. If you search for all notes, it will not display. To display notes with a source of appointment, use the Quick Find search.

Prerequisites

You must be the owner, assignee, or have been granted access to a note in order to view it.

Steps

1. Click **Notes** on the main navigation bar.

   The Note Summary window opens with a list of your editable Notes.

2. Click **Search** in the Notes Summary window.

   The Notes Search window opens.

3. Enter your search criteria and click **Search**.

   The Note Summary window opens with a list of your editable Notes.

Creating a Note

A note records descriptive information that is generated by users about business transactions so that it can be referenced. Perform the following steps to create a note.

Note: If you are running Notes integrated with Sales Online (OSO), the Notes Summary and Create Notes windows are combined together onto one page.

Prerequisites

None

Steps

1. Click **Notes** on the main navigation bar.

   The Note Summary window opens with a list of your editable Notes.

2. Click **Create** on the Summary window.

   The Create Note window opens.

3. Enter your required criteria.

   You must select:

   - Type from the drop-down menu
   - Enter text in the description field
   - Select a Status

4. Click **More** to open the large note where you can enter up to 4 GB of text.

5. (Optional) Enter your criteria in the Relate To fields.
6. Click either **Create**, to create a single Note or click **Create and Create Another** to return to the Create Note window in order to create another note.

   A confirmation appears that your note was created successfully.

Adding an Attachment

Note: The attachment types Short Text and Long Text used in the form version of the Notes module are not available in HTML.

See Calendar for information regarding Adding an Attachment.

Viewing Existing Attachments

See Calendar for information regarding Viewing Existing Attachments.

Creating Note Text

A large note records up to four GB of text which is attached to your note. Perform the following steps to create a large note.

Prerequisites

You must be in the process of creating a note.

Steps

1. Navigate to the Create Note window and click **More**.

   The Large Note window opens.
2. Enter your text.
3. Click **Save** to attach the large note to your note.

   A confirmation appears that your note was attached successfully.

Using the Relate To Function

Note that are related to must be used to assign one or more business objects to Notes. A note may be created for a Task (the source) but it is also related to an employee. Perform the following steps to relate an activity to a note.

Note: The Relate To drop-down is limited depending on which Oracle module is integrated with Notes.

Prerequisites

You must first have created a note.

Steps

1. Navigate to the Note Details window.

   The Notes Details window opens.

2. Click **Relate To**.

   The Relate To window opens.

3. Select the type from the drop-down menu.
4. Click **Go** in the Name column to open the List of Values Renderer.

   You can enter two wild cards to populate the fields.

5. Click the hyperlink name.

   The Relate To window populates with the selected criteria.

6. Click **Update**.

Using Notes (Forms)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser. Ensure that you are viewing the correct information for your software.

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

- Creating Notes
- Finding Notes

Creating Notes

A note records descriptive information that has been generated by users about business transactions so that it can be referenced. You can use the Notes component from different applications in the product suite to access the comment log that relates to a specific transaction. Use this procedure to create a note.

Prerequisites

None

Steps

1. On the application menu bar, click **Tools** and select **Notes**.

   The Notes window opens.

2. On the Notes toolbar, click **New**.

   The application populates the source, owner, and date fields.

3. Enter the note information in the Notes field.
4. Optionally, click **More** to enter a note in the Detailed Note window.

   The Detailed Note window holds textual notes up to 32 K in size.

5. Select note type and status from the LOV for each field.
6. Select from the LOV in the Related To field.
7. Enter a value in the Value field.

   Define the information you enter in the Related To and Value fields according to the relationship between the note and business transaction. Use the Related To field to identify the source type for the note information and the Value field to specify the source name or number.

8. Save your note.

   Your note is created and saved.

Guidelines

View the note log in spread table format through the Notes tab and text format through the Summary tab. Clicking **Latest First** in the Summary tab organizes the note history so that the most recent note appears at the top of the summary.

See Also

Finding Notes

Finding Notes

Find notes by performing a search for source number, owner, date, or note type. Perform the following steps to find an existing note.

Prerequisites

None

Steps

1. On the application menu bar, click **Tools** and select **Notes**.

   The Notes window opens.

2. On the application toolbar, click **Find**.

   The Find Notes window opens.

3. Select source and number from the LOV for each field and click **Search**.

   The application populates the main note window with the note information.

4. (Optional) Search for notes by owner, date, or note type.

   Use this procedure to search for notes without a source value.

   a. Enter owner, date, or note type and click **Search**.

      The application populates the Notes tab in the Notes window with the possible matches.

   b. Click to select your note and scroll right for additional information.

   The note search process is complete.

Guidelines

Further refine your note search by entering Related To information in the Find Notes window. Selecting a match option also helps you refine your search.

See Also

Creating Notes

Using Spreadtables

This topic group provides process-oriented, task-based procedures for working with the embedded spreadtables.

This section covers the following topics:

- Spreadtables
  - Sorting
  - Finding
  - Copying and Exporting
  - Customizing Layout

Spreadtables

Spreadtables provide flexibility in displaying and handling data. Use them to track, sort, search, copy and export data, and customize your display. You can perform the following tasks with dynamic spreadtables:

- Sorting
- Finding
- Copying and Exporting
- Customizing Layout

Sorting

You can sort two ways:

1. To sort a category, click the grey dot in its column header.

The arrow that replaces the grey dot indicates a direction of order, for example, ascending or descending alphabetical or chronological order, where applicable.

Re-sort in the opposite direction by clicking the header arrow again.

2. You can right-click on a cell and select **Sort** in the table from the pop-up menu that appears. This action opens a dialog box in which you can select up to three columns for sorting.

Finding

To find specific information in the table, right-click on a cell and select **Find** from the pop-up menu that appears.

Find a matching value by typing the desired sequence of characters into the text field that appears. Indicate whether to match case, and select the direction of the search, backward or forward.

Click **Cancel** to stop a long running search.

Copying and Exporting

To copy a cell, selected rows, or all rows of data to the clipboard, right-click in a cell. From the menu, choose the appropriate option that appears.

When you insert the copied selection into a spreadsheet application, such as Microsoft Excel, the appropriate headers automatically migrate with the selection and appear as its first row. Rows are copied in a tab-delimited format.

Cells that display values as check marks or X display differently when copied and exported: positive values are expressed as asterisks (*) and negative values do not display.

Note: Hidden information does not migrate with exported data.

Customizing the Layout

Adjust the table layout to accommodate your needs:

- You can make changes to the column width, sequence, visibility, and sort order.
- Resize the columns or rows to display text as you wish.
- Depending on the application, you can resize the window also, and the spreadtable display will adjust accordingly.

- Resequence the columns: in a header, click and hold mouse until a black box appears. Move the header to the selected position. Allow for the delay before moving.
- To make irrelevant or confidential information invisible, right-click the header of the column you wish to hide and then select Hide Column on the pop-up menu.
- The Show Column option reveals a submenu that lists currently hidden columns. Select all or only those you wish to display.
- Hidden information does not migrate when data is copied to the clipboard.
- To preserve changes you make to the table layout, right-click a column header. Choose Customizations, and from its submenu, choose Save.
- To restore default settings, right-click a column header. Choose Customizations, and from its submenu, choose Clear.

Understanding Territory Manager

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

This section covers the following topics:

- Territory Management Overview
- What's New in This Release
- Terms and Definitions
- Basic Territory Building Blocks
- Different Ways of Creating Territories
- Territory Hierarchies
- Territory Winning Rules
- Sample List of Predefined Territory Qualifiers
- Understanding the Territory Details Window
- Territory Lookup Tool Field Descriptions
- Territory Manager Process Flow

Territory Management Overview

The following topics describe what Territory Manager is and when and why you use it:

- What is a Territory?
- What is the Territory Manager?

- What is the Territory Lookup Tool?

What is a Territory?

A territory is an organizational domain with boundaries defined by attributes of customers, products, services, and resources.

Territories can be created on multiple criteria including postal code, area code, country, vertical market, size of company, and product expertise. It can be created based on geographical locations, for example, East Coast and West Coast territories. It can also be based on customer name if targeting specific customers or products, for example, Business World territory, or the combination of both geographical location and customers, such as a West Coast Business World territory.

What is the Territory Manager?

Territory Manager provides user interfaces and functionality that organizations can use to manage territories.

Use Territory Manager to automatically set up sales and service teams based on their availability and expertise. Also use it to make sales, and service information more secure by restricting personnel access to customer data.

Most sales and service territories are one dimensional. They can assign tasks to employees based on:

- postal code
- area code
- country
- vertical market
- size of company
- product expertise

Territory Manager makes it possible for you to create multidimensional territories using a number of such criteria.

For example, you can assign all large customers within a specific geographical area only to those sales representatives who have an expert knowledge of a product and have been with the company for more than one year.

You can create multiple such territories for individuals or for teams of sales and service representatives. Think of Territory Manager as a high-level programming tool that determines the assignment of tasks and resources within your company.

What is the Territory Lookup Tool?

Many Oracle Sales users need to have the ability to lookup territories, which have been defined for Oracle Sales and Telesales, and the representatives assigned to those territories. The Territory Lookup Tool allows these users to view the appropriate sales representatives that have been assigned to specific territories.

The Territory Lookup Tool has a dynamic window format that requires no customizing. It dynamically displays the account qualifiers for sales that are selected in Territory Manager. You can enter criteria in fields that are enabled qualifiers.

See Also

- Basic Territory Building Blocks
- Different Ways of Creating Territories

What's New in This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for the Territory Manager:

- Creating Customer Name Range Groups
- Customer Name Range Group as a Transaction Qualifier
- Setting the Start and End Dates in Mass Change Territory Resources
- Copying an Entire Territory Hierarchy
- Search Enhancements

Creating Customer Name Range Groups

Define, maintain, or delete a Customer Name Range Group in the Customer Name Range Group window. This feature is used by Sales and Telesales only.

Customer Name Range Group as a Transaction Qualifier

You can choose Customer Name Range Group as a transaction qualifier and define the group as well as add its values. Remember to first enable it from the

Administration menu > Setup Qualifiers, which opens the Setup Qualifiers window.

Setting the Start and End Dates in Mass Change Territory Resources

You can set start and end dates in the Assignee region. The previous release allowed only the current date. You have greater control in reassigning your territories.

Copying an Entire Territory Hierarchy

Copy an entire territory hierarchy including all associated children by selecting the Copy button on the Overview tab in the Territory Details window. Once an entire territory is copied, the children can be individually selected and renamed.

Search Enhancements

The Search window from the Administration menu features multiple tabs and fields. You can filter your territory search based on various criteria such as usage, boundary (postal code range), customer name, territory type, resource name, and territory property or qualifier.

Terms and Definitions

The following table describes Territory Manager terms and definitions.

Territory Manager Terms and Definitions

Term	Description
Automatic Assignment	Automatic Assignment refers to the matching of territories to resources resulting in a "Winning Territory".
Catch All	A Catch All territory is a placeholder used at the top of a territory hierarchy when no other has been defined.
Effective Dates	The date a territory, member assignment, and so on, is effective, or to be in use.

Territory Manager Terms and Definitions

Term	Description
Escalation Territories	Escalation territories provide you with the ability to define the escalation path in the event of exceptions. This is necessary for all administrative purposes and accountability purposes. Territory based escalation definition will provide you with the multi-level escalation path for each territory. When defining a territory, the user has the option of designating the escalation territory. An escalation territory must be defined with the escalation flag checked before it will be present in the Escalation LOV.
Number of Winners	The Number of Winners field is used to specify the maximum number of potential winning territories.
Operators	Operators refer to the ability to use arithmetic operators. While defining territories, the qualifier values should be either discreet using operators (for example, <>,=<>,<=,>=, LIKE, or a range using BETWEEN.
Qualifiers	Qualifiers are used to define Territories.
Dynamic Mode (Default)	Dynamic qualifiers are used to control the number of territories after creating a mass number of territories. The values of both transaction and resource dynamic qualifiers are exclusively mixed together while assigning them to the new territories.
Static Mode	Static qualifiers are used to transfer the qualifier’s values to every new territory no matter if it is a transaction or a resource qualifier after territory mass creation. Therefore, you can treat the values of the static qualifiers as the required values for every new territory.
Rank	Rank is used to specify the priority of a territory among territory random selection. It is used with number of winners.
Resource Qualifiers	Resource Qualifiers are the criteria used specifically in selecting resources.
TAE	TAE is an acronym for Territory Assignment Engine. After territories are defined, each module can call a standard API to get a set of qualifying employees for a transaction. The API in turn calls the Territory Assignment Engine to figure out the qualified Territories that are returned to the API, which then figures out the qualifying resources.
TM	TM is an acronym for Territory Manager. This is used as a tool that helps manages territories.

Territory Manager Terms and Definitions

Term	Description
Territory	A territory is an organizational domain with boundaries defined by attributes of customers, products, services, and resources.
Territory Administrator	This person administers the specific and periodic duties of Territory Manager. See the Getting Started section for more information.
Territory Templates	A territory template is used to create many similar territories simultaneously. They can be based upon territory types. (Optional) Whenever a new set of territories needs to be generated, a template can be used.
Territory Type	Territory Types are used to group transaction qualifiers when creating territories. In usage, territory types are based on the specific business need. Consequently, territory types can be defined to organize the business. Types are also able to be based on usage, such as, Marketing, Sales, and Service. A territory type can be based also upon customer and product. Another example can include customer type and location.
Top-level Territory	A top-level territory is a territory that has the "Catch All" as a parent.
Transaction Qualifiers	Transaction Qualifiers are the criteria used to determine the winning territory.

Basic Territory Building Blocks

Use the following basic building blocks to define a territory:

- Qualifiers
- Territories
- Territory Types
- Territory Templates
- Escalation Territories

Note: When creating a territory, you may not need all of the building blocks. You can create a stand-alone individual territory by entering territory qualifiers and their values directly, without using a territory type, a territory template, or an escalation territory.

Qualifiers

The following section describes qualifiers in detail:

- Qualifier Components
- Transaction Qualifiers
- Resource Qualifiers
- Using Qualifiers
- Seeded Qualifiers

Qualifier Components

There are two types of qualifiers that help define a territory: Transaction Qualifiers and Resource Qualifiers. A qualifier also consists of three components: name, operator, and value. The following table describes each component:

Qualifier Components

Components	Description
Name	The name of the qualifier. It can be postal code, item, task priority, request status, job title, or others.
Operator	Use operator to connect a qualifier name and its values to make a qualifier meaningful. The operator's list of values (LOV) depends on the data type of the qualifier. Possible values are =, < >, >, <, >=, <=, Like and Between. The default value for this field is "=".
Value	The selection from the LOV in this field is based on the selected qualifier. For example, the LOV for the request status qualifier can be Open or Closed. If the qualifier is area code, then manually enter this field, for example, 408, 415, and so on.

Transaction Qualifiers

Transaction Qualifiers are used to specify the criteria about how the territory module assigns resources to transactions. It is the first key decision point when Assignment Manager tries to assign resources to a document or a task.

For example, use area code, postal code, company name, or opportunity channel as the criteria to help assign qualified resources for transaction needs.

Different territory usages, like Oracle Sales or Service, use different sets of transaction qualifiers and those transaction qualifiers are grouped by transaction type. For example, a sales or telesales territory has three predefined transaction types: Account, Lead, and Opportunity. Some examples of transaction qualifiers within the Account Transaction Type are company name, area code, and postal code. Opportunity channel is one transaction qualifier for the Opportunity Transaction Type.

Note: You must enable existing transaction qualifiers before using them.

Resource Qualifiers

Resource Qualifiers specify what attributes are used to select the individuals responsible for those transactions. Examples include job title, competence, and language. These qualifiers act as filters which define resource selections.

For example, if you are looking for specific resources who speak Italian for your customer needs, then the resource qualifier can be identified as "Language = Italian." This aids in selecting resources that qualify for your condition.

You can still make selections from the qualified resources suggested by the resource qualifier before assigning them to a territory.

There is no need to specify the resource qualifiers if you know exactly which resources are needed for a certain territory. Instead, identify the resource names on the Resources tab of the Territory Details window.

Using Qualifiers

Why Use Transaction and Resource Qualifiers?

After understanding the concepts of transaction qualifiers and resource qualifiers, it is easier to understand how a territory works. A territory uses resource qualifiers to filter resources that you want to attach to a territory. A territory uses transaction qualifiers and values to determine if a territory can win in that transaction. If the territory happens to win, then the resources attached to the territory can be assigned to the transaction.

Seeded Qualifiers

Territory Manager provides a large number of seeded qualifiers for Defect Management, Sales and Marketing, Service, and Trade Management.

Territories

A Territory consists of qualifiers and their values. You can create a territory individually or you can create a large number of territories all at the same time using a territory template.

An Example:

Suppose your company wants to finalize a business transaction with Business World Inc. and that it also requires a manager position to close the deal. A territory is set up with two qualifiers: "Customer Name = Business World Inc." and "Job Title = Manager" for this one time deal. You do not need to use any of the existing Territory Type or Territory Template for this territory creation. You can add an escalation territory later with a different manager who has a superior record for handling complex cases if the assigned manager is not able to close the deal.

The territory creation process can use some or all of the following basic building blocks:

- Territory Types
- Escalation Territories
- Territory Templates

See Also

Different Ways of Creating Territories

Territory Types

A Territory Type is a grouping of transaction qualifiers. Without setting qualifier values, you can use it to simplify and systematize the territory creation process. Use territory types to group transaction qualifiers used for creating territories. This saves time when creating similar territories.

Suppose you want to create territories by geographical area. In this case, create a territory type with the Country and Postal Code qualifiers.

Note: Plan your territories and enable existing transaction qualifiers before creating territory types.

Territory Templates

Use a Territory Template to create many similar territories at the same time. Suppose you have two large customers and you want to create a territory for each of them for every state in the United States. Creating individual territories requires repeating the same procedure 100 times, once for each of the 50 states and again for each company. Using a territory template, you can create all of the 100 territories at the same time.

Escalation Territories

An escalation territory provides the resources responsible for managing escalations.

You use Escalation territories to define the escalation path with appropriate resources that the escalation owner identified for the territory in the event of exceptions. In case of automatic assignment by using an escalation territory, the Assignment Manager is used in conjunction with the Territory Manager. The escalation can be automatically assigned to an owner if the escalated document (like service request, tasks, or defect) has an escalation territory defined.

You can create alternate escalation territories to automatically reassign a service call when certain conditions are not met.

a. A repair team assigned to a repair does not take action within five business days, so now that repair can be assigned automatically to another group.

b. A service engineer cannot service a request within a certain time frame which is set up in the Business Rule Monitor (BRM), so now the service request will be automatically escalated to the resource.

Different Ways of Creating Territories

You can create territories in one of three ways:

- Individually
- With a territory type
- With a template

Creating Individual Territories

Create a stand-alone territory by entering territory qualifiers and their values directly. This method does not leverage your work because you have to add both qualifiers and their values for each territory you create.

Creating a Territory Using a Territory Type

Create territories using a territory type in a three step process:

- Create the territory types by adding chosen transaction qualifiers.
- Use territory types to create territories.
- Set qualifier values for each territory.

Use this method for creating multiple territories with similar characteristics. Using territory types to create territories saves time because you do not have to add qualifiers to each individual territory, but you still have to create each individual territory separately by entering values for the qualifiers.

Note: You must use territory templates to create territories if you plan to use resource qualifiers. Territory types limit you to using transaction qualifiers only.

Creating a Territory Using a Territory Template

Create a large number of territories all at the same time using a territory template. For example, suppose you want to create a separate territory for every state in the United States for two large customers. Creating individual territories requires you to repeat the procedure 100 times, once for each of the 50 states for each company. Using territory types, you still must create each 100 territories separately although the process is somewhat shorter. By following the procedure outlined in Using a Template to Create Large Numbers of Territories, you can create all 100 territories at the same time.

Territory Hierarchies

The purpose of having territory hierarchies is to make the territory assignments and searches more efficient. Territory hierarchies also have the ability to store the parent-child relationship among territories.

Parent-Child Territory

Any territory consisting of one or more subterritories is considered as a parent territory. For example, a West Coast territory could consist of three subterritories: Washington, Oregon, and California. This West Coast territory and the three subterritories have the parent-child relationship.

Features of a Child Territory (Subterritory)

To help maintain integrity in the hierarchy, each child territory logically inherits the qualifiers and values of the parent territory. Also, additional qualifiers and values can be added.

Territory Winning Rules

Territory Manager uses the Number of Winners field set to the top level of territory hierarchy to determine the winning territories. This field cannot be entered if it is not the top level territory.

Territory winning rules are used in several different ways in the Oracle E-Business Suite. For example, Oracle Service tends to enter ONE in the Number of Winners field, which helps to select the most qualified resources for the service requests.

Multiple winners are commonly used in Oracle Sales to meet the business needs, but a single winner is also used in Sales. If the Number of Winners field is not set, then the number of winning territories defaults to one for the hierarchy under that top-level territory.

There are two possible outcomes based on values entered in the Number of Winners field:

- One Winner
- Multiple Winners

One Winner

If you enter 1 in the Number of Winners field in the Overview tab, then Territory Manager assigns the transaction to a single territory in the territory hierarchy.

Use the territory ranking mechanism for breaking ties between wining territories. The highest rank of competing territories (which is represented by a lower number) wins against the lowest rank of the territories (which would be the higher number) in the territory hierarchy.

Multiple Winners

If you enter a number greater than 1 in the Number of Winners field in the Overview tab, then Territory Manager assigns a transaction to multiple qualifying territories.

Use the Number of Winners field to limit the number of winning territories. However, if there are three territories that qualify for the criteria, but it can only have two winners, then ranking determines the final two winners among the three territories.

Note: Only the territory that has resources attached can be a winning territory.

Sample List of Predefined Territory Qualifiers

Territory Manager includes pre-defined qualifiers for the following CRM modules:

- Oracle Defect Management
- Oracle Sales and Marketing
- Oracle Service
- Trade Management

The following table describes a small sample of both resource and transaction qualifiers.

Example of Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Defect Management	Defect Transactions	Product
Sales	Account	Customer Name Range
Trade Management	Trade Account	State
Service	Service Request	Request Type

See Also

Viewing Transaction Qualifiers

Understanding the Territory Details Tab

The following table describes the different tabs available in the Territory Details Windows.

Territory Details Window Tabs

Tab	Description
Overview Tab	Use this tab to enter basic territory information including name, description, effective dates, and crucial information like rank, number of winners, and transaction types.
Transaction Qualifiers Tab	Specify transaction qualifiers and their values for a territory.
Resource Qualifiers Tab	(Optional) Use this tab to specify resources qualifiers and their values. It is not mandatory to enter resource qualifier information if you know exactly what resources you want to use in a territory.
Resources Tab	Use this tab to specify resources manually or click the Auto Assign Resources button to display and select qualifying resources based on resource qualifiers and their values defined in the Resource Qualifiers tab.
Subterritories Tab	(Optional) Use this tab when a territory hierarchy includes territories below the current territory. Click New Subterritory and repeat the territory creation procedure for new subterritories.

WARNING: After creating or modifying a territory, you must run the concurrent program "Generate Territory Package." This allows the system to compile the business rules defined in the territory creation.

If this step is not completed, changes to territories will not be reflected when the Territory Assignment Engine assigns transactions.

The following sections describes the fields on each tab in detail.

The Overview Tab

The following table describes the functionalities of the fields on the Overview tab in the Territory Details Window.

Overview Tab

Field	Description
Usage	Describes the usage of this territory. For example, this territory is used for Oracle Service. The usage limits the selection of transaction types.
Escalation	Leave this field blank if an escalation territory is not required.
Transaction Types	The transaction type is based on the territory usage. For example, Service Request and Task are the transaction types for Oracle Service. Account, Lead and Opportunity are used by Oracle Sales and Telesales. The selection of transaction qualifiers is based on the transaction type. For example, task type, status and priority are transaction qualifiers of Task transaction type for the usage of Service application. To enable existing transaction qualifiers, select Setup Qualifiers from the Administration pull-down menu.
Type	Select the territory type if you want to create multiple territories with similar characteristics. Once the territory type is selected, the names of the Transaction Types fields and the transaction qualifiers on the Transaction Qualifiers tab populate automatically because the territory type is a group of transaction qualifiers, and the transaction qualifiers are based on the transaction type. You only need to assign the value of each transaction qualifier to the territory you are going to create on the Transaction Qualifiers tab. You cannot select the territory type if the transaction types are selected first because the transaction types override the territory type. The (territory) Type field is blocked out.
Number of Winners	Specify the number of winners only at the top level of a territory hierarchy, such as the top level territory directly under Oracle Service. This field is protected if it is not the top level territory and an error message appears.
Rank	Specify the territory ranking information. The lowest rank of competing territories wins at the same level in the hierarchy.
End Date	Use this field to obsolete a territory. This field is not mandatory.
Template	This field displays the template name if you create a territory using a template.
Freeze	Once this field is checked, the territory cannot be updated any more. **You cannot uncheck this field after it is checked. Once this is checked, the territory can only be deleted.**

Overview Tab

Field	Description
Copy Territory	Used to duplicate an existing territory. To duplicate an existing territory including the entire hierarchy, click the Copy Territory button. A Copy Territory window opens and you can check the Copy Hierarchy check box.

Opportunity, Lead, Task, and Service Request are considered a super set of the Account qualifiers. Therefore, the account related transaction qualifiers, such as Postal Code and State, are available even if the account transaction type is not selected for the territory usage of Oracle Sales or Telesales.

WARNING: Be cautious while using the Freeze check box. It is suggested that you leave this freeze box unchecked at all times unless it is necessary. You cannot undo a Freeze.

The Transaction Qualifiers Tab

The following table describes the functionalites of the fields on the Transaction Qualifiers tab in the Territory Details Window:

Transaction Qualifiers Tab

Field	Description
Name	The available transaction qualifiers are based on the transaction types and usage defined in the Overview tab. Enter the qualifiers manually if you create a territory without a territory type. If you cannot find the transaction qualifiers or no values are returned from the list of values (LOV), then enable them from the Setup Qualifiers window. Use the wildcard blind query “%%%” to bring up the LOV in the Value From and Value To fields if you want to list the entire LOV for the selected qualifier. Otherwise, enter at least three letters, such as “Bus”, to launch the LOV for “Business.”

Transaction Qualifiers Tab

Field	Description
Allow Overlap	The default value for this field is checked. If you do not want to allow overlap for a qualifier, uncheck the Allow Overlap check box. Allowing overlap enables you to assign overlapping territory values to the same qualifier. By enabling overlap, you can enter both ranges as values for the qualifier. With overlap not allowed, you cannot use any of the values within both ranges for a territory at the same level in the hierarchy. If checked the Territory Manager prevents you from entering the second range of values for the qualifier. However, you can use the values as the qualifier for the next level down or up.
Next Value Set	This button is used only in territory template and if the qualifier is in dynamic mode.
Mass Create Territories	Specify the template name in the Overview tab and use this button for large numbers of territory creation.
Show Inherited Qualifiers	If this territory is part of a hierarchy of territories, click this button to see which qualifiers this territory logically has inherited from its parent territories.

WARNING: You must enter transaction qualifiers and values in a territory so that it can be considered when a transaction is assigned. If you do not specify transaction qualifiers in a territory, then the resources attached to the territory will not be assigned to any transactions.

The Resource Qualifiers Tab

Unlike the transaction qualifiers, the availability of the resource qualifiers is not limited to the usage and transaction types you choose for a territory.

Enter the resource qualifiers you are going to use if you need assistance in assigning resources to a territory. For example, use “Job Title = Manager” to help you identify resources with manager title. There is no need to use this tab if you know exactly which resources are going to be used for a territory.

The following table describes the functionalites of the fields on the Resource Qualifiers tab in the Territory Details Window.

Resource Qualifiers Tab

Field	Description
Name	Enter the Name of the qualifier or use the list of values (LOV) to populate the field.
Type	Automatically populates based on the name of the resource qualifier.
Next Value Set	This button is used only in territory template and if the qualifier is dynamic mode.
Operator	Use this field to connect a qualifier name and its values to make a qualifier meaningful.
Value From	This field is based on the Name entered. There is also an LOV list to choose from.
Value To	Field is dependent on the Operator chosen.
Mass Create Templates	Use this button to create a large numbers of territories at the same time. Specify the template name in the Overview tab before clicking this button.

The Resources Tab

Only territories that have resources attached can be winning territories. Therefore, when a resource is added to a territory for the first time, you must run the "Generate Territory Package" concurrent program.

Resources assigned to territories can be any CRM resource defined in the Resource Manager, for example, employees, salespeople, groups, teams, parties, partners, and supplier contacts. If you know exactly which resources are going to be assigned to a territory, then it's not necessary to use the Resource Qualifiers tab to limit the resources.

The following table describes the functionalites of the fields on the Resources tab in the Territory Details Window.

Resources Tab

Field	Description
Name	Enter the Name of the Resource or use the list of values (LOV) to populate the field.
Type	Automatically populates based on the name of the resource qualifier.

Resources Tab

Field	Description
Group (Located on the horizontal scroll bar.)	Specifies which groups the resource belongs to.
Role (Located on the horizontal scroll bar.)	Specifies which roles the resource is assigned to.
Access Type	Specifies the transaction type for each individual resource assigned to a territory. If this field is blank, then the resource assigned to a territory can access every transaction type listed in the Overview tab. For example, if the selected access type for John Doe is Service Request, then John can only be assigned to a job related to service request. He cannot be assigned to a task or a task through service request.
Auto Assign Resources	Select the Auto Assign Resources button to view all qualifying resources that match the Resource Qualifiers.
Full Access (Located on the horizontal scroll bar.)	This field is only used by Sales and Telesales. If selected, the resource has the full access to the transaction type specified in the Access Type field. For example, if the access type is Lead, the resource can only be assigned to Lead and Account. The person cannot be assigned to an Opportunity.
Primary Contact (Located on the horizontal scroll bar.)	Select this box for the primary contact if you have more than one resource identified.
Start Date and End Date (Located on the horizontal scroll bar.)	Specify the resource available dates.

If you cannot find any people in the Qualifying Resources window, then go back to the Resource Qualifiers tab and either enter a different set of resource qualifier values or select resources manually on the Resources tab.

Note: Auto Assign Resources is functional only if the resource qualifiers and their values are entered in the Resource Qualifiers tab.

The Subterritories Tab

Use the Subterritories tab when your territory hierarchy includes territories below the current territory. This tab helps you create subterritories, also called child territories.

The parent territory field populates automatically after clicking the New Subterritory. For example, you create a subterritory by clicking this button from the Bay Area - South territory, then Bay Area - South becomes the parent territory of this new subterritory.

The following table describes the functionalites of the fields on the Subterritories tab in the Territory Details Window:

Subterritories Tab

Field	Description
Start Date	Enter the start date.
End Date	Enter the end date.
Rank	Enter the rank.
New Subterritory	Select this button to create a child territory with all the attributes of the parent. It repeats the territory creation procedure for the new subterritory.

Territory Lookup Tool Field Descriptions

The following table describes field types in the Lookup Tool window of Territory Manager.

Lookup Tool Window Descriptions

Field Label	Field Type	Description
Organization	Text Button	Enter a partial or complete organization name for the search in the text field. This field is case insensitive. You can also use a wildcard.

Lookup Tool Window Descriptions

Field Label	Field Type	Description
Go	Button	Click this button to find an organization entered in the organization text field. The results appear in the Select an Organization Window.
Country	Drop-down	Use the drop-down list to search for resources assigned to the qualifying territory based on the country. This is a required field.
State	Drop-down	Use the drop-down list to search for the resources assigned to the qualifying territory based on the state.
Province	Drop-down	Use the drop-down list to search for the resources assigned to the qualifying territory based on the province.
Postal Code	Text Field	Enter the postal code for the search.
Area Code	Text Field	Enter the area code for the search.
Customer Category	Text Field	Use the drop-down list to search for the resources assigned to the qualifying territory based on the customer category.
Search	Button	Click this button to execute a search for resources assigned to the qualifying territory.
Clear	Button	Click this button to clear all search criteria so you can search for new resources assigned to a territory.

The following table describes field types in the Select an Organization window of Territory Manager.

Select an Organization Window Descriptions

Field Label	Field Type	Description
Organization	Text Field	Enter a partial or complete organization name for the search in the text field. This field is case insensitive. You can use a wild card.

Select an Organization Window Descriptions

Field Label	Field Type	Description
Go	Button	Click this button to find an organization entered in the organization text field. The results appear in the Select an Organization Window.
Organization	Text Field	This read only text field displays the organizations that matched the search value from the Territory Lookup Window.
Address	Hyperlink	Click on the address to access the Territory Search Results Window which displays the resources assigned to the qualifying territory based on the organization and address (including country, state or province and postal code).
First	Hyperlink	Click on First to access the first page of records with the list of organizations that matched the search value from the Territory Lookup Window. The numbers of rows displayed can be customized in Profiles.
Previous	Hyperlink	Click on Previous to access the previous page of records that was viewed.
Counter	Text Field	This read only text field displays the record number, the number of records displayed in the page and the total number of records found from the organization query.
Next	Hyperlink	Click on Next to access the next page of records.
Last	Hyperlink	Click on Last to access the last page of records found from the organization query.
Cancel	Button	Click this button to cancel the query results and return to Territory Lookup Window.

The following table describes field types in the Territory Lookup Search Results window of Territory Manager.

Territory Lookup Search Results Window Descriptions

Field Label	Field Type	Description
Organization	Text Field	This read only text field displays the organization value that the territory search was based on.
Modify Search	Button	Click this button to modify the search and return to Territory Lookup Window.
Salesperson	Text Field	This read only text field displays the resource name assigned to the qualifying territory.
Job Title	Text Field	This read only text field displays the job title of the resource assigned to the qualifying territory.
Phone Number	Text Field	This read only text field displays the phone number of the resource assigned to the qualifying territory.
Email	Hyperlink	Click on the email to access the email template with the resource’s email address populated for communication purposes.
Manager Name	Text Field	This read only text field displays the Manager name of the resource assigned to the qualifying territory.
Manager Phone Number	Text Field	This read only text field displays the Manager’s phone number of the resource assigned to the qualifying territory.

Territory Manager Process Flow

Before using the Territory Manager, your territory planning team must analyze your business and organization needs for better territory planning and future management. This step should be in place before implementing the Territory Manager.

The implementation team enables seeded qualifiers used in your territories based on the planning decisions.

The territory administrator then begins the territory creation process, according to the territory plan, using the concept of basic territory building blocks. This territory creation process may use different ways to create territories either with or without using templates or types. It can include the use of escalation territories to help manage future escalations.

After territories have been created, you can search and view territory hierarchies through either the Administration menu or the Navigator tree. The territory administrator must run the “Generate Territory Package” concurrent program to generate correct territories with changes reflected before calling modules assign resources defined in your territories.

The following table describes the order and process of implementing, using, and administering the Territory Manager.

Territory Manager Process

Steps	Description	Required	Performed By
Territory Planning	Analyze the territory setup in your organization before utilizing Territory Manager. You need enterprise-wide cooperation and feedback. You must expect to make multiple territory revisions in the early months of operation as your enterprise discovers omitted information or territories that do not work on a day-to-day basis.	Yes	Management, Implementor, Territory Administrator
Enable Qualifiers	Use qualifiers as the criteria to delineate a territory.	Yes	Implementor
Create Territories	Create territories for a variety of transactions. For example: account, lead, opportunity, and service requests.	Yes	Territory Administrator
Create Templates	Use a territory template to create many similar territories at the same time.	Optional	Territory Administrator
Create Types	Create territory types to form a grouping of transaction qualifiers that can be used to simplify and systematize the territory creation process.	Optional	Territory Administrator
Create Escalation Territories	Use escalation territory to create alternate territories where transactions such as a sales lead or service call is automatically reassigned when certain conditions are not met. It defines the teams that handle escalations. It is limited to identifying resources.	Optional	Territory Administrator
Create Customer Name Range Group	Create, modify, or delete an existing name of a group and it’s children. You must first create this transaction qualifier, before enabling it.	Optional	Territory Administrator

Territory Manager Process

Steps	Description	Required	Performed By
Create Mass Change Territory Resources	Use to mass transfer territory allocations from one resource to another.	Optional	Territory Administrator
Run Concurrent Program	Run the concurrent program "Generate Territory Package" after creating or modifying your territories. This allows the system to compile the business rules defined during territory creation. If this step is not completed, the territories will not work correctly.	Yes	Territory Administrator
Search and View Territories	Search and view territories based on various criteria. You do **not** need to run the Concurrent Program to search or view Territories.	Optional	All Users
Territory Lookup Tool	Use this HTML based window to search for sales reps. The winning territory is based on the Territory setup and search criteria selected. It searches down the territory trees to find the winning territory.	Optional	All Users
Run Reports	Run reports to track your selections and changes. There are two types of reports you can generate in either HTML or export to Microsoft Excel: Territory Definition Report Territory Changes Report	Optional	All Users

See Also

Using the Territory Details Window

Using Territory Manager

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks. The following topics are generally performed by all users.

This section covers the following topics:

Getting Started

Use Territory Manager to perform the following tasks:

- Using the Look Up Tool
- Viewing Territories
- Viewing Territory Templates
- Viewing Escalation Territories
- Viewing Territory Types
- Searching for Territories

- Running Reports

Using the Territory Lookup Tool

Use the Territory Lookup Tool to find:

- An organization
- A sales representative

The Territory Lookup Tool returns the names of the sales representatives attached to the winning territories based on the Territory setup and search criteria. It searches down the territory hierarchy to find the resources of the winning territory. Perform the following steps to look up a customer's assigned sales representatives.

Note: In the Organization field, you can use a wild card with at least two letters.

The Territory Lookup Tool is HTML based.

Prerequisites

- Enable qualifiers
- Create the necessary territories
- Acquire the appropriate responsibilities

Steps

1. Navigate to the Territory Lookup window.
   - Since the Territory Lookup feature can be customized, the navigation path varies depending on client preferences.
   - The Territory Lookup window is dynamically generated, based on the enabled qualifiers in Territory Manager.
2. Enter the value(s) in the search fields and click either **Search** or **Go.**
   a. If you click **Go**, then the Select an **Organization** window appears giving you a detailed list of values (LOV) based on the organization name including: address and organizational name.
   - Select your choice. The Territory Lookup Search Results window appears.

b. If you click **Search**, then the Territory Lookup Search Results window appears with the search results. This is a list of **sales representatives** that have been assigned to the customer based on the entered criteria.

Accessing the Territory Manager

You can access the Territory Manager in two ways:

- From the territory tree Navigator window
- From the Administration pull-down menu

By accessing the Territory Manager, you are able to view and search for territories. Use the Navigator to:

- View the structure of territories in a tree format and create new territories.
- View and modify territory types and the territories created by using them.
- View and modify your created escalation territories.
- View and modify territory templates and the territories created by using them.
- Search for the territory you want to view or modify from the tree structure.

View and modify any item in the tree by double-clicking on it. If this is the first territory you are creating, then select the node of an Application, for example, Oracle Service or Oracle Sales and Telesales applications.

Viewing From the Tree Navigator Window

Perform the following steps to view the Navigator window:

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. From the tree Navigator window, use the View By drop-down list to select different territory options in the Navigator.

The territory tree structure (territory hierarchy) reflects the change of your selection.

3. Click the node that you want to edit, then right-click to select additional options from the menu.

> **Note:** A catch all territory is a placeholder used at the top of a territory hierarchy.

Viewing From the Administration Drop-Down Menu

Perform the following steps to view a territory from the Administration pull-down menu.

Prerequisites

None

Steps

1. From the CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens. This window allows you to access the Administration option menu bar.

2. Select **Administration**.

   From this menu you can:

   - Enable qualifiers
   - Define templates, and territory types
   - Create individual or escalation territories
   - Define customer name range groups
   - Make mass change territory resources
   - Perform search functions

Viewing Transaction Qualifiers

Perform the following steps to view the entire list of Transaction Qualifiers.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. Select **Setup Qualifiers** from the Administration pull-down menu.

   The Setup Qualifier window opens.

3. Select the type of Usage. In the status area select All, then click **Find**.

   The Setup Qualifier window is populated with the defined transaction qualifiers including a description, transaction type, and organization.

Viewing Territory Templates

Perform the following steps to view the territory templates.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. From the View By drop-down list, select **Territory Templates.**
3. View the territory templates.
   - The Navigator displays the territory template you have created.
   - If you have used the territory template to create territories, then those territories appear in a tree under that territory template.
4. Double-click to view or modify a territory template.

   The Template Territory Details window opens.

Viewing Escalation Territories

Perform the following steps to view escalation territories.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. From the View By drop-down list, select **Escalation Territories**.
3. View the escalation territories.
4. Double-click to view or modify an escalation territory.

   The Escalation Territory Details window opens.

Viewing Territory Types

Perform the following steps to view territory types.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. From the View By drop-down list, select **Territory Types**.
3. View the territory types.
4. Double-click to view or modify a territory type.

   The Territory Type Details window opens.

Searching for Territories

Perform the following steps to execute an enhanced search for territories, territory types, escalation territories, and territory templates.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The Territory Tree Navigator window opens.

2. From the Administration menu, choose **Search.**

   The Territory Search window opens.

3. Select Usage.

4. Choose your selection from the Search category:

   - Territories Search
   - Types
   - Escalations
   - Templates

5. In the **Basic** tab, enter the desired data and click **Search**.

   - The results of your search appear in the Search Results field.
   - (Optional) Use the **Advanced** tab to search for specific qualifier values or additional territory properties.

6. To view any of the found items, select the item from the Search results and click **Populate Tree** or **View Territory**.

   - If you choose Populate Tree, the Navigator opens to your selection.
   - If you choose View Territory, the Territory Details Window opens.

Using Personal Shortcuts

Perform the following steps to save your territories to the Personal Shortcuts folder. This folder contains your shortcuts and allows you to find your territories quickly.

Prerequisites

Perform the Searching for Territories step through step six.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The Territory Tree Navigator window opens.

2. From the Administration menu, choose **Search.**

   The Territory Search window opens.

3. Follow the steps in Searching for Territories.
4. In the Search Results field, select your territory and click **Save Folder**.

   The Save As window opens.

5. Enter your new folder name in the text field.
6. Click **Save Folder**.
7. Refresh the Navigator tree and open the Personal Shortcuts folder to find your saved shortcut.

Running Reports

Users with administration privileges can run two types of reports:

- Territory Definition Report
- Territory Changes Report

Both reports can be viewed online or saved in a spreadsheet format.

Note: If you want to view your report as a spreadsheet, it is faster to verify your selection in HTML and then export it to Microsoft Excel.

Territory Definition Report

Perform the following steps to retrieve specific territory information based on certain criteria, such as a specific resource or a transaction qualifier.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Reports > Territory Definition Report.**

   The Territory Definition Report window opens.

2. Select Output Format from the drop-down menu.

   Choose either HTML or Excel.

3. Select Sales Rep from the drop-down menu.
4. Select Qualifiers from the drop-down menu and click **OK**.

Territory Changes Report

Perform the following steps to trace territory change information for a specific period of time.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Reports > Territory Changes Report.**

   The Territory Changes Report window opens.

2. Select Output Format from the drop-down menu.

   Choose either HTML or Excel.

3. Enter values for the Earliest Change Date and the Latest Change Date.
4. Click **OK**.

Administering Territory Manager

This topic group provides administrative procedures required for creating territories and ongoing system maintenance. It also includes information on administration tools and utilities.

This section covers the following topics:

Getting Started

The territory administrator begins the territory creation process. This territory process may use different ways to create territories either with or without using templates or types. It can also include the use of escalation territories to help manage future escalations.

Note: Before setting up all your territories, set up two or three first. Generate the package and test territory assignments to make sure that transactions are correctly assigned. When these few territories work correctly, continue setting up all territories.

The Territory Administrator performs the following tasks:

1. Creating Individual Territories
2. Creating Territory Types
3. Creating Escalation Territories
4. Using a Template to Create Large Numbers of Territories
5. Creating Customer Name Range Groups
6. Creating Mass Change Territory Resources
7. Running Concurrent Programs

Creating Individual Territories

Perform the following steps to create individual territories with or without using territory types:

1. Create territory overview information with the Overview tab.
2. Select transaction qualifiers using the Transaction Qualifiers tab.
3. (Optional) Select resource qualifiers using the Resource Qualifiers tab.
4. Select resources using the Resources tab.
5. (Optional) Create subterritories using the Subterritories tab.

Prerequisites

There must be a Territory Plan in place.

Steps

1. From the CRM Administrator responsibility, select **Territory Manager > Territory Administration.**
2. Select **Define Territory** from the Administration pull-down menu.

   The Territory Details window opens.

   Note: You can also use the Select the Territory from the Tree Navigator that serves as a parent to the new territory and right-click to select New from the pop-up menu.

   ---

3. Select the Overview tab.
   a. Use the list of values (LOV) in the Usage field to select the type of application you want to use in this territory. Your selection limits the types of qualifiers that can be used in the territory definition.
   b. Enter a name and description for the territory.
   c. To limit the time the territory is effective, enter the Start and End Dates. By default the territory become effective on the date that you create it.
   d. (Optional) Verify that the parent territory is the territory you selected in the Navigator. If this is not the parent territory, then use the LOV to select the appropriate parent territory.
   e. (Optional) If you have created an escalation territory for this territory, then enter it using the LOV in the Escalation field.
   f. (Optional) If you want to use an existing territory type to create this territory, then use the LOV to enter it in the Type field.

   WARNING: If you use a territory type, then you are restricted to using the qualifiers set up in that territory type.

   ---

   g. Use the Transaction Types LOV to select one or more types of transactions based on the territory usage. Available values include account, lead, opportunity, and service request. Note that some application types allow you only one transaction type.

WARNING: Be cautious while using the freeze check box. It is suggested that you leave this freeze box unchecked at all times unless it is necessary. You cannot undo changes once the freeze box is checked.

4. Select the Transaction Qualifiers tab.
   a. (Optional) If this territory is part of a hierarchy of territories, then click **Show Inherited Qualifiers** to examine which qualifiers this territory has inherited from its parent territory or territories.
   b. (Optional) If you have used a territory type to create this territory then the qualifiers are already prefilled.
   c. If you are creating a new territory without a territory type, enter the qualifiers you are going to use in the Transaction Qualifiers region.
   d. If you want to enter overlapping values for a qualifier, then check the **Overlap Allowed** check box.
   e. Enter the values and operators for each qualifier.
5. (Optional) Select the Resource Qualifiers tab.
   a. Use the LOV in the Name field to choose the type of resources for the territory.
   b. Use the LOV in the Operator field and Value field to make the appropriate selections.

Note: Use Mass Create Templates **only** when creating territories with a territory template. Specify the template name in the Overview tab before clicking this button.

6. Select the Resources tab.
   a. Select the resources for the territory using the LOV in the Name field.
   b. Enter the Group level from the LOV in the Group field.
   c. Enter Role from the LOV in the Role field.
   d. Select Access Type from the LOV in the Access Type field.
7. (Optional) Select the Subterritories tab.

Use this tab if your territory hierarchy includes territories below the current territory.

a. Click **New Subterritory** and repeat the territory creation procedure for the new sub-territory.

b. Click **Save** from the menu.

Using the Territory Details Window

Use the Territory Details window to perform the following.

- Create Territories
- Create Escalation Territories
- Create Territory Templates

See Also

Understanding The Territory Details Tabs

Creating Territory Types

Perform the following steps to create territory types.

Prerequisites

- There must be a Territory Plan in place.
- You must enable your qualifiers.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. From the Administration menu, select **Create Territory Type.**

   The Territory Type window opens.

3. If a similar territory type already exists, then you can save time by copying it.

   a. Search for a similar territory type.

   b. If a similar territory type is found, then click **Copy Type**.

The application creates a copy of the existing territory type that can be modified.

4. In the Usage field, use the list of values (LOV) to select the type of application using this territory type.
5. Enter a name for the territory type and a description.
6. Enter a date range to limit the use of the territory type by date.
7. Use the LOV to select one or more transaction qualifiers based on the territory usage field.
8. Click **OK** to save your work and exit.

Selecting the Resources for a Territory

Perform the following steps to select the resources to staff a territory.

> **Note:** It is not mandatory to enter resource qualifier information if you know exactly which resources you want to use in a territory.

Prerequisites

The Territory Details window is active with the territory you want to staff displayed.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. Navigate to the chosen territory and double-click the territory.

   The Territory Details window opens.

3. Select the Resource Qualifiers tab.

   a. In the Name fields of the Resource Qualifier region, use the LOV to enter the qualifiers related to the skill set of the employees assigned to this territory.

   b. Enter the values for each qualifier.

4. Select the Resources tab.

a. Use the list of values (LOV) to enter the resources in the Name fields if you want to assign them to this territory or you have a small pool of people to work with.

b. If you do not know the people you want assigned to this territory and have a large pool of potential names, then click **Auto Assign Resources.**

   The Qualifying Resources window displays a list of people that fit the resource qualifiers values you have entered.

   If no people or the wrong people are found, then go back to the Resource Qualifiers tab and enter a different set of resource qualifier values, or select resources manually in the Resources tab.

c. Select the people you want to assign to this territory by checking the **Assign** check box next to their name.

d. Click **OK** when you are finished.

e. Check the **Primary Contact** check box next to the name of the person designated to become the primary contact for the territory.

f. For each resource you can add a Start and End Date to limit their participation.

g. For each resource, enter the transactions you want them to access.

   For example, you want some resources to access account and contact information, but not lead information.

h. To enter access for an individual select the resource in the Resources region.

i. Select the access type in the Access region below.

5. Click **Save** on the toolbar.

Creating Escalation Territories

Perform the following steps to create escalation territories. Escalation Territories are alternate territories in which transactions such as a service call are automatically reassigned when certain conditions are not met. Escalation Territories define the resources that handle the escalations.

Prerequisites

There must be a Territory Plan in place.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. From the Administration menu, select **Escalation Territories.**

   The Escalation Territory Details window appears.

3. In the Overview tab, use the list of values (LOV) in the Usage field to select the type of application you want to use in this territory. Your selection limits the types of qualifiers used in the territory definition.

4. Enter a name and description for the territory.

5. Enter the Start and End Dates to limit the time the territory is effective.

   By default the territory become effective on the date created.

6. Select the resource qualifier for the escalation territory

   See the procedure in Selecting the Resources for a Territory.

7. Click **Save** on the toolbar.

Entering Qualifier Values

Perform the following steps to enter qualifier values while creating individual territories. You cannot use this procedure for entering qualifier values in territory templates.

Prerequisites

The Transaction Qualifiers or Resource Qualifiers tab is selected.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. Navigate to the chosen territory and double-click the territory.

   The Territory Details window opens.

3. Select either the Transaction Qualifiers or Resource Qualifiers tab.

4. Select the qualifier in the Qualifiers region.

   You will see the possible value types. For example, if you are entering values for the Customer Name qualifier used in Sales applications, then enter a value.

5. Select an operator using the list of values (LOV).

   The list of operators varies depending on the type of qualifier selected. For example, some qualifiers allow only the "=" symbol.

6. Enter the values in the appropriate fields.

   Some operators limit the range of values. The field names change depending on the qualifier.

Copying an Entire Territory Hierarchy

Perform the following steps to copy an entire territory including all the subterritories (children.)

Prerequisites

You must first have a territory that you want to duplicate.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The Territory Tree Navigator window opens.

2. Navigate to the chosen parent territory and double-click the territory.

   The Territory Details window opens.

3. In the Overview tab, click the **Copy Territory** button.

   The Copy Territory window opens.

4. Select the **Copy Hierarchy** check box if you want to copy the entire territory hierarchy.

5. In the Assignee area, enter a new name and description.

6. (Optional) Enter a new rank.

7. (Optional) Enter a new start and end date.

8. Save your work.

9. Verify your new territory by refreshing the tree.

> **Note:** The names of the new child territories are the same as the originals. You must open each one individually to make any changes.

Using a Template to Create a Large Number of Territories

Perform the following steps to create a territory template that automates the process of creating a large number of territories. After you create the territories, then open up each individual territory and select the resources you want assigned to each territory. The following procedure consists of two separate tasks:

- Creating a template
- Creating a large number of territories from that template

Creating a Template

Prerequisites

- If you want to use territory types to create territories, then create the territory types first.
- There must be a Territory Plan in place.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. In the Navigator, select the territory that serves as a parent to the new territory. If this is the first territory you are creating, then select **Catch All.**
3. Right-click and select **New** from the drop-down menu.

   The Template Territory Details window appears.

   If you selected an existing territory as the parent, then the Usage and Parent fields are pre-filled. If Catch All is the parent territory, then use the list of values (LOV) in the Usage field to select the type of application you want to use for this territory. Your selection limits the types of transaction qualifiers you can use in the territory definition.

4. In Transaction Types fields, use the LOV to enter one or more transactions.

   You can create territories for a variety of transactions. These include account, lead, opportunity, and service request. CRM applications restrict the types of transactions that can be used for territory creation. For example, you cannot create a territory for leads for a service application.

5. If you want to use an existing territory type to create this territory template, then use the LOV to enter it in the Type field.

   If you use a territory type, then you are restricted to using the qualifiers set up in the territory type.

6. Select the Transaction Qualifiers tab.

   a. Use the LOV to enter the qualifiers in Qualifier Type.

      If you are using a territory type to create the territory template, then some of the Qualifier names are already prefilled.

   b. Select either **Static** or **Dynamic** from the Qualifier Mode drop-down list for each qualifier.

   c. Enter values for each transaction qualifier.

   d. Select the qualifier in the Transaction Qualifiers region.

   e. If the qualifier you have selected is a static qualifier, then enter the values.

   f. If the qualifier is a dynamic qualifier, then enter the values or value sets, clicking **Next Value Set** between each entry or set of entries**.**

   g. If you do not want to add resource qualifiers for this template, then go directly to the Creating Mass Territories step.

7. (Optional) Select the Resource Qualifiers tab.

   a. Use the list of values (LOV) to enter the qualifiers in the Name fields.

   b. Select either **Static** or **Dynamic** from the Mode drop-down list for each qualifier.

   c. Enter values for each resource qualifier:

      * Select the qualifier.

      * If the qualifier selected is a static qualifier, then enter the values.

* If the qualifier is a dynamic qualifier, then enter the values or value sets, clicking **Next Value Set** between each entry or set of entries.

8. Save your work.

Creating Mass Territories with a Template

Prerequisites

- You must have created a template.
- There must be a Territory Plan in place.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The territory tree Navigator window opens.

2. Navigate to the chosen territory and double-click the territory.

   The Territory Details window opens.

3. Open the Transaction Qualifier tab or the Resource Qualifier tab.

   The chosen tab window opens.

4. Click **Mass Create Territories.**

   The system creates territories with generated names in the form:

   <template name> - GENERATED TERRITORY #<number>

   For example, the territory template named "US Time Zones" generates three territories with the following names:

   – US Time Zones - GENERATED TERRITORY #1
   – US Time Zones - GENERATED TERRITORY #2
   – US Time Zones - GENERATED TERRITORY #3

See Also

Creating Geographical Territories Using a Template (Example)

Entering Static Qualifier Values for Templates

Perform the following steps while creating territory templates to enter values for static qualifiers. Static qualifiers values exist in all the territories you are mass creating.

Prerequisites

Perform the following steps as you create territory templates.

Steps

1. Open the Transaction Qualifier tab or the Resource Qualifier tab.

   The chosen tab window opens.

2. Select the name of the qualifier at the top of the window.

   The possible value types appear below.

   For example, if you are entering values for the Name of Customer transaction qualifier, then you can enter one value: the name of the customer.

   If you are entering values for the Interest Type qualifier used in sales applications, then you can enter three values: for the interest type, for the primary and for the secondary interest.

   Resource Qualifiers can consist of static qualifiers.

3. Use the Operator list of values (LOV) to select an operator.

   The list of operators varies depending on the type of qualifier used. Some qualifiers, such as Name of Customer, allow only the "=" or "<>" operators.

4. Enter the values in the fields provided. Some operators allow a range of values to be entered; others only a single value.

   The number of fields and field names change depending on the qualifier.

See Also

Creating Territory Templates

Entering Dynamic Qualifier Values for Templates

Perform the following steps while creating territory templates to enter values for dynamic qualifiers. Dynamic qualifiers have a different value in each territory created. Both transaction qualifiers and resource qualifiers are shown in the following steps.

Prerequisites

Perform the following steps as you create territory templates.

Steps

1. Choose the Transaction Qualifier tab or the Resource Qualifier tab.

   The selected tab window opens.

2. Choose the name of the qualifier at the top of the window.

   For example, if you are entering Customer Name as the transaction qualifier, then you can enter only one value: the name of the customer.

   If you are entering values for the Language Type resource qualifier used in sales applications, then you can enter two values: English and French.

3. Use the Operator list of values (LOV) to select an operator.

   The list of operators varies depending on the type of qualifier used. Some qualifiers, such as Name of Customer, allow only the "=" or "<>" operators.

4. Enter the value(s) in the fields provided. Some operators allow you to enter a range of values; others only a single value.

   The number of fields and field names change depending on the qualifier.

5. Click **Next Value Set**.

   A new entry line opens.

6. Enter the next value or set of values in the same manner.

7. Repeat this procedure for all the values for this qualifier.

   Each time you click **Next**, the Value Set number increases by one.

   For example, if you want to enter all the states of the United States as values for the dynamic qualifier State, then:

   a. Enter the first state in the Value field and click **Next.**

      You can manually enter "1" in the Value Set field.

   b. Enter the second state in the Value field and click **Next.**

      You can manually enter "2" in the Value Set field.

c. Repeat the procedure for each of the remaining states.

8. When you have entered all of the values, complete the procedure for creating territory templates.

Creating Geographical Territories Using a Template (Example)

The following procedure is an example of using a template to create geographical territories using the following business scenario. The steps include:

- Setting Up the Template
- Setting Up Overview Information
- Setting Up Transaction Qualifiers
- Setting Up Resource Qualifiers

The Business Scenario

Suppose you want to create territories for telephone support and field service engineers for different city branches of two large customers: Vision Enterprises and Business World Inc.

Also assume you want to ensure that the field service engineers are located in the same city as the branch they service.

You want to create four territories for each city. For example:

- Vision Enterprises: San Francisco with Manager Resource
- Vision Enterprises: San Francisco Technician Support
- Business World Inc.: San Francisco with Manager Resource
- Business World Inc.: San Francisco Technician Support

Below are the steps required to create territories for this business scenario.

Setting Up the Template

1. Navigate to **Administration >Territory Management > Mass Create Territories**.
2. In the Overview tab, set up the basic information about the territory template.
3. In the Transaction Qualifiers tab, set up one dynamic transaction qualifier, Customer Name, and one static transaction qualifier City.

4. In the Resource Qualifier tab, enter the qualifiers that are used to pick the resources who handle the transactions you set up in the Transaction Qualifier tab.

   - If you are setting up geographic territories and you want the resources to come from the same geographical area as the transactions, then you must set up a geographical structure for the resource qualifiers that is parallel to the one you set up for the transaction qualifiers.
   - The one resource qualifier used in this example is: Job Title with values of manager and technician.

   a. Click **Mass Create Territories**.

      The system creates territories with generated names in the form.

      * Vision Enterprises/Business World by city: GENERATED TERRITORY #1
      * Vision Enterprises/Business World by city: GENERATED TERRITORY #2
      * Vision Enterprises/Business World by city: GENERATED TERRITORY #3
      * Vision Enterprises/Business World by city: GENERATED TERRITORY #4

   b. Open each generated territory and change the generated name to a recognized one.

5. In the Resources tab, click **Auto Assign Resources.**

   The Qualifying Resources window displays a list of people that fit the resource qualifiers values you have entered.

6. Select the people you want to assign to this territory by checking the **Assign** check box next to their name and click **OK**.

7. Check the **Primary Contact** check box next to the name of the primary contact for the territory.

8. For each resource add a Start and End Date to limit their participation.

9. Click **Save** from the menu.

Setting Up Overview Information

Perform the following steps to set up the template overview information:

1. In the Usage field, select from the list of values (LOV) the type of application using this territory template.

   Your selection limits the types of qualifiers you can use in the territory template definition.

2. Enter a name and description for the territory template.

   For example, Vision Enterprises or Business World by city.

3. To limit the time the territory template is effective, enter the dates.

   By default the territory template becomes effective on the date created.

4. Choose from the LOV in the Parent field.
5. Use the LOV to select one or more types of transactions that will be assigned to each territory.

   Available values depend on your territory usage.

Setting Up Transaction Qualifiers

Perform the following steps to set up transaction qualifiers.

1. Select the Transaction Qualifiers tab.
2. Use the list of values (LOV) to enter the City and Customer Name qualifiers in the Qualifier Type fields.
3. From the Qualifier Mode drop-down list, select **Static** for City transaction qualifier.
4. Select "=" as the operator.
5. Enter the first city, San Francisco, as a value for the City qualifier.
6. Enter the Customer Name qualifier in the qualifier region.
7. Select **Dynamic** in the Mode field.
8. Select "=" as the operator.
9. Enter the first of the two companies, Business World, as a value for the Customer Name qualifier.
10. Click **Next Value Set**.

    The "1" shows up in the Value Set field or you can manually enter "1" in the Value Set field.

11. Enter Vision Enterprises as a value for Customer Name.

12. Repeat step 10 but change the number to "2".

Setting Up Resource Qualifiers

Perform the following steps to set up resource qualifiers:

1. Select the Resource Qualifiers tab and add the Job Title qualifier.
2. From the Qualifier Mode drop-down list, select **Dynamic** for the Job Title qualifier.
3. Select "=" as the operator.
4. Select the list of values (LOV) to choose the first of the two:
   Job Title and Manager.
5. Repeat step 10 of the Setting up Transaction Qualifiers.
6. Enter the second job title, Technician, following the same procedure.
7. Repeat step 12 of the Setting up Transaction Qualifiers but enter a value of "2."

Creating Customer Name Range Groups

The Customer Name Range Group allows you to create a new group, or modify or delete an existing group name. Deletion can only occur when it has not been associated with Customer Name Range transaction qualifier value.

> **Note:** The Customer Name Range Group applies **only** to Sales and Telesales. It has a customer name range transaction qualifier associated with it which is of account type.

Perform the following steps to create a new group.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The Navigator window opens.

2. Select **Define Customer Name Range Group** from the Administration drop down menu.

   The Define Customer Name Range Group window opens.

3. Enter a name and description in the appropriate fields.
4. Select an Operator from the list of values (LOV).
5. Enter your criteria in the Value From field.

   If the Operator is "BETWEEN", then you must fill in the Value To field.

6. Enter the Value From field and Value To field when the operator is BETWEEN.

   Repeat the process for any other detail records you want to add.

7. Save your work.

   Now that it has been defined, you can use it to create or modify a territory.

8. Either create a new Sales and Telesales Territory or open an existing one.

   The Territory Details window opens.

   Note: An Account Transaction Type must exist.

   ---

9. Select the Transaction Qualifier tab.
   - In the Name field, select the LOV list. The Select Transaction Qualifiers window opens. Select Customer Name Range and click **OK**.
   - In the Operator field, the default is "=".
   - In the Group field, select your Customer Name Range group from the LOV.
   - In the Value From field, enter all applicable customer names.
10. Save your work.

Creating Mass Change Territory Resources

Use Mass Change Territory Resource to add or replace resources assigned to territories. An example of using this would be if salesperson A was leaving the company and wanted to transfer his territories to the incoming salesperson B. Perform the following steps to make mass changes in Territory Resources.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration.**

   The Navigator window opens.

2. Select **Mass Change Territory Resources** from the Administration drop down menu.

   The Mass Change Territory Resource window opens.

3. In the Resource field in the Find Territories region, select from the List of Values (LOV).

   If the resource field is left blank and you click **Find**, then a list of all the territories that do not have any resources attached appears.

4. Click **Find** to find all territories assigned to that resource.
5. In the Operation region select either the Replace or Add button.
6. In the Scope region, Click either the **All** or **Selected** button.

   > **Note:** If you choose to select certain resources, hold down the control key on your keyboard as you use your mouse to select.

7. In the Resource field in the Assignee region, select the new resource from the LOV and click **OK**.
8. (Optional) Select a start and end date. The default is the current date.
9. Select **Update Territories** to save.

Note: Resources that have territories "replaced" are not associated with these territories again.

Tips for Fine-tuning Territory Assignment Performance

Ranking Strategy

You can speed up processing time by ranking more frequently used territories higher than less frequently used territories.

An Example:

There are two sales organizations, one in Canada and one in the United States. In this case, you know that 80 percent of your customers come from the United States. You can rank the US territory higher than the Canada territory. The application saves processing time as a result because it looks for a US territory before it looks for a Canadian territory.

You must use caution that your modifications do not result in erroneous assignments, however.

Suppose you have two overlapping territories.

- Territory A

  Qualifier: Company Name Range = V%

  Note: The "%" symbol is a wild card.

- Territory B

  Qualifier: Company Name Range = Vision Enterprises%

  If you rank territory A higher than territory B, then territory B never receives any assignments. All Vision accounts are assigned to territory A.

Comparison Operators

Avoid using "<>", NOT LIKE and NOT BETWEEN operators.

Troubleshooting

The following tips can be useful.

- Set up territories in hierarchical fashion for easy maintenance.
- Make the territories as generic as possible.
- If you create a territory and do not assign resources to it, then the Territory Manager does not return this territory as a qualifying territory.
- You can create your own module specific "Catch All."

Running Concurrent Programs

After defining territories using the Territory Manager, you must run the Generate Territory Package concurrent program. This builds the Territory Assignment Engine. After the concurrent program runs successfully, the Territory Manager module is automatically updated. Run this program every time a territory is added or changed. The following table describes the function of the seeded Concurrent program.

Seeded Concurrent Programs

Name	Function
Generate Territory Packages	■ Builds the API that returns the winning territories, which are defined in territory setup. ■ Returns the winning territories and resources. ■ Creates search index for faster performance.

Prerequisites

None

Steps

1. From the CRM Administrator responsibility, select **Requests > Run.**
2. Select the **Single Request.**
3. In the Parameters pop-up window of the Submit Request, select each transaction type in the Qualifier Type field that you defined in your territories, one at a time, based on the territory usage.

For example, if you created a territory with two transaction types, Task and Service Request, then run Task as well as Service Request each time in the Parameter window.

4. Use the Schedule button in the Submit Request window to run concurrent programs periodically.

Understanding Assignment Manager

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

This section covers the following topics:

- Overview of Assignment Manager
- Ownership and Resources
- The Gantt Chart
- Assignment Manager and Other Modules
- Assigning Process
- Selecting Assignment Criteria
- What's New in This Release
- Terms and Definitions
- Assignment Manager Process Flow
- Tips

Assignment Manager Overview

The following topics describe the Assignment Manager and its use:

- What is the Assignment Manager?
- What is an Assignment?
- Who uses the Assignment Manager?

What is the Assignment Manager?

The Assignment Manager is a tool used to select and designate qualified resources to a document or a task. Accessed from other modules and applications, it is not a stand-alone module. It supports all resource categories defined in the Resource Manager module.

Note: Documents can be leads, opportunities, service requests, defects, or escalations. Once a document is created, it can require multiple tasks to fulfill the requirements.

Using the Assignment Manager, you can designate resources for a task or document as well as assign ownership.

Designate Resources

For example, you log a service request. Before sending qualified help, use the Assignment Manager to determine:

- Resources that are responsible for the company's geographical location
- Resources that are available for a specific time frame, such as, by the end of the week
- Resources with the lowest labor rate and available time slot information
- Resources preferred by the company

Assign Ownership

Besides assigning qualified resources to a task or a document, Assignment Manager can also assign ownership to a task or a document. Use Assignment Manager to:

- Assign responsibility for documents and tasks
- Assess the availability of qualified resources needed to be an owner for a task or document

The assignment process uses criteria based on preferred resources, availability, and territories. An optional module, Oracle Scheduler provides additional features to optimize scheduling resources.

What is an Assignment?

An assignment is any given task or responsibility. It can be delegated to you, due to your ability or due to your availability during a specific time frame.

An Example

A support manager promises to fix all hardware computer problems in the company. You, as a desktop support technician, are requested to fix all the desktop computer problems by the end of this week due to your expertise in the hardware support group. This assignment, from your manager, can either be accepted or rejected depending on your availability. In this example, the support manager is the owner of the assignment. You are an assignee if you accept the assignment. The assigning criteria is based on your expertise and resource availability for a specific period of time.

Who Uses the Assignment Manager

Because the Assignment Manager functions as a tool to help select qualified resources for a task or a document, it’s window is embedded within other CRM Application Foundation modules or applications. It is not used as a stand-alone module. The following examples illustrate how the Assignment Manager is used by other modules:

- **Defect Management** uses the Assignment Manager to assign ownership and resources to a defect.
- **Field Service** uses the Assignment Manager to assign a field engineer with the lowest cost and travel time between tasks.
- **Teleservice** uses the Assignment Manager to assign ownership and support resources to a service request or a task.
- **Task Manager** uses Assignment Manager to assign both the task owner and assignee.
- **Escalation Manager** uses the Assignment Manager to manually escalate a task, defect, or a service request to escalated resources.

Note: Task assignments are time sensitive and dependent on resource availability. Therefore, the Intelligent and Window to Promise options are limited to selecting assignees. They are not used for assigning ownership.

Ownership and Resources

Use the Assignment Manager to assign ownership and resources to a specific task or document based on selection criteria including customer preferred resources, territories, and resource availability. The following section discusses the concept of ownership and resource assignment options.

- Ownership
- Assigning Resources
  - Assisted Assignment Option
  - Unassisted Assignment Option
  - Intelligent Assignment Option
  - Window to Promise Assignment Option
- Preferred Resources

Ownership

You must assign an owner when you create a document or task to ensure that some type of action is taken.

- **A document owner** can be a service manager, expediter, marketing person, service support, or a sales person.
- **A task owner** can be a planner, dispatcher, or service representative. An owner is defined as a resource within the Assignment Manager.

In order for a task or service request to be fulfilled, that task or service request must have a person (owner) responsible for subsequent actions. The actions are performed either by that person or by someone else (assignee) for task completion. The assignee is selected based on the ability or availability.

Assigning Resources

Use Assignment Manager to designate qualified resources to a task or a document based on certain criteria, such as availability and resource locations. There are four resource assignment options used in the Assignment Manager:

- Assisted Assignment Option
- Unassisted Assignment Option
- Intelligent Assignment Option

- Window to Promise Assignment Option

Assisted Assignment Option

Instead of selecting resources based on your own choices, use the Assisted Assignment option to find a list of resources in the Assignment Manager based on a predefined set of criteria. When the Assignment Manager is invoked, the Assisted option is the default assigning mode.

For task assignments, save your task first before launching the Assignment Manager. Otherwise, the task start and end date information will not populate automatically in the Document Details region.

Use this option if you want Assignment Manager to assist you in selecting qualified resources to be the owner of a document or to fulfill a task based on certain criteria. This selection criteria can help you assign qualified resources to a task or a document.

An Example

Business World is having computer problems and has requested its vendor, Vision Corporation's support department. Vision's customer support representative needs to send resources to Business World for this assignment. The representative can use the Assisted option in the Assignment Manager to help select qualified resources. The search criteria are:

- Resources preferred by Business World
- Resource recommendations based on territory assignment
- Resource recommendations based on time availability for the next five business days

The following selection criteria is available in the Assisted option:

Preferred Resources: This is used to retrieve a customer's preferred resources (engineers) defined in Oracle Contracts or Install Base.

Territories: If the Territories check box is checked, you can identify the transaction qualifiers, for example Customer Name, to be used in territory selection. If this is the first time running Assisted option, all transaction qualifiers are automatically checked. After a search, all resources in the winning territories with transaction qualifier "Customer Name" are shown in the Resource region.

Resource Availability: This is used to search for all available resources based on a task or a document duration.

After a search, you can view shift schedules and assigned tasks in the Gantt chart.

Unassisted Assignment Option

Use the Unassisted Assignment option if you want to assign a document without taking search criteria into account. If you want to assign a group resource to a task, then either specify the group name (if you know it) or search for all group resources, and then make your choice based on resource availability for the task.

An Example

Business World Inc. buys computers from Vision Corporation as well as having a service agreement with Vision. Vision's customer support representative receives a call from Business World requesting Vision to repair one of the on site computers within five business days. She logs a service request and then creates a task for the request. She also enters the current date as the planned start date and adds five business days to establish the end date. In addition, she also enters Business World's location for this request. Before assigning qualified resources to this task, she calls to a hardware support manager for resource recommendations. He suggests John Doe, as he has previously worked with Business World.

The customer support representative then uses the Assignment Manager to view the availability information for Doe before assigning him to the request. After launching the Assignment Manager from a service request or a task, she can select one of the four assignment options in the Assignment Manager window. The default is the Assisted option. If she changes it to the Unassisted assignment option, she can enter the following resource information to limit resource selection:

Resource Partial Name: If she knows exactly what resources she is going to assign to a task or document, then she can enter the resource name or partial name to limit the selection.

Resource Type: This field limits resource selection if she only knows the resource type information. For example, select group resource in the Resource Type field to retrieve all the group resources information.

If the Unassisted assignment option is selected, predefined selection criteria will not be available. After a search, she can view shift schedules and assigned tasks in the Gantt chart.

Intelligent Assignment Option

Use this option only if Oracle Scheduler is installed. The Intelligent Assignment Option displays resources with costs and travel time information which is particularly useful to Field Service. When Oracle Scheduler is installed, the Intelligent Assignment option enables you to assign a task based on predefined constraints to qualified service representatives. These constraints, travel time, travel distance, working overtime, delay time, and so on, are cost related and are set up based on your business needs.

The result of using this option is the creation of sequenced tasks for each service representative. Therefore, the travel time is indicated in the beginning of each task and between tasks. You can optimize this schedule later or reassign a task before dispatching the schedule to the service representative.

Note: Oracle Scheduler uses the Time Distance Server to determine the cost for a qualified resource. It is based on the field service representative's starting and ending locations for a task (or between two tasks) and the amount of time that it takes to travel. Therefore, each task needs location information that is derived from the address using street, city, country, and zip code.

Once the Intelligent option is chosen, you can select any combination of the same three options that are used in the Assisted option.

Window to Promise Assignment Option

As with the Intelligent Assignment option, use this option only if Oracle Scheduler is installed. This option displays time slots at which a service representative can visit a customer to perform a task. This time slot is reserved for a customer and is defined in the Oracle Scheduler setup screen. One time slot can be reserved for multiple customers.

The time window is also calculated through the Time Distance Server. It is based on the field service representative's starting and ending locations for a task (or between two tasks) and the amount of time that it takes to travel between the two. Therefore, each task needs location information that is derived from the address.

This option is especially useful, as it not only provides you with the functionality to select the qualified resource based on predefined resource selection criteria, it also takes into consideration the customer's preferred time frame with possible costs identified for task completion.

An Example

Business World reports network problems and asks Vision Corporation to send a field technician for hardware repair. To minimize costs, Business World requests that the work is to be done between 10:00 am to 12:00 p.m. on Wednesday or 8:00 a.m. to 12:00 p.m. on Friday. Vision estimates that this repair would take four hours for completion.

Vision’s field service dispatcher logs a service request and uses the Window to Promise option in the Assignment Manager. This helps her identify a resource who is available from 8:00 a.m. to 12:00 p.m. on May 4, 2001 (Friday) with a reasonable cost for the assignment. After the Window to Promise option is selected, she selects the following options:

Preferred Resources: She unchecks all the preferred resources if no preferred engineers are identified in Contracts or Install Base.

Territories: She selects the Territories check box to use territories to assist in the resource assignment.

Resource Availability: She checks this to see the available resource. This is not available if neither Preferred Resources nor Territories are used.

After a search, she can view shift schedules and assigned tasks in the Gantt chart.

Options for Assigning Ownership and Availability

There are several ways you can assign ownership and availability in the Assignment Manager. The following table describes the two options for assigning ownership.

Assigning Ownership

Option	Description
Assisted	Use this option to find a list of qualified resources based on a predefined set of criteria. With automatic assignment, when no resource can be found based upon the selection criteria, you can use the Assisted window to adjust your criteria and perform a search.
Unassisted	Use this option to assign a task or document without taking the criteria into account, or to overrule the criteria set.

The following table describes the four options for assigning resource availability.

Assigning Resource Availability

Option	Description
Assisted	Use this option to find a list of qualified resources based on a predefined set of criteria. The Gantt chart displays tasks and task statuses. When no qualified resource is shown, you must adjust your criteria and search again. With automatic assignment, when no resource can be found based upon the selection criteria, you can use the Assisted window to adjust your criteria and perform a search.
Intelligent Assignment	This is an option specific to field service that is only available when Oracle Scheduler is installed. Oracle Scheduler assigns the task to a qualified resource with cost and travel time information, which is particularly useful to Field Service.
Window to Promise	This is an option specific to field service that is only available when Oracle Scheduler is installed. The Window to Promise displays time intervals at which a resource (service representative) can visit the customer to perform the task.
Unassisted	Use this option to assign a document or task without considering search criteria. For example, to assign a group to a task, either specify the group name, if known, or search for all group resources and then select them based on resource availability for the task.

The Assignment Manager uses Calender to check the availability of a resource. When a task is assigned to a resource, that resource becomes unavailable for the period of time designated by the task.

Preferred Resources

Preferred resources must first be set up in the following applications:

- Oracle Service Install Base
- Oracle Contracts

A customer's preferred resources can be employee, groups, or team resources set up in Oracle Contracts or recommended from the Install Base in Oracle Service. Once the preferred engineers are identified in either application, you can retrieve recommended resources based on specific customer preferences.

Two Examples:

1. Mary Smith and Jane Doe are specified as preferred engineers in contract agreements with Company A. A service representative can use the Assisted assignment option, by selecting the Contracts check box in the Assignment Manager, to display both engineers as resource options in the Resource region.
2. John Roe is specified as the Install Base preferred engineer for Business World. The Service Representative sees John's name in the Resource region if the Install Base check box is checked.

Note: The Assignment Manager engine uses the "Activate Contracts Preferred Engineers" and "Activate Installed Base Preferred Engineers" system profile options to determine whether the preferred engineers are chosen automatically.

The Gantt Chart

The Gantt chart provides a quick graphical overview of the scheduled tasks based on a specific period of time.

Note: The Thin Client Framework (TCF) server must be set up correctly and running in order for the Gantt chart to work properly.

After a search, you can view the following information for a specific resource in the Gantt chart:

- Shift Schedules (yellow background)
- First Available Time (green bar)
- Assigned Tasks (blue bar)
- Escalated Tasks (red bar)

The shift schedules are defined in the Calendar module.

Use the Assisted option to adjust your search criteria if sufficient resources cannot be located. You can drag the scroll bar to move across the Gantt if the shift or current time line is not synchronized properly.

Assignment Manager and Other Modules

The Assignment Manager is integrated with other Foundation Application modules and CRM applications. To fully optimize Assignment Manager, the following modules must be set up first.

- Oracle Scheduler
- Territory Manager
- Calendar

Oracle Scheduler

Oracle Scheduler is an add-on option that is designed specifically for the needs of field service. Scheduler is especially helpful for users that have frequent schedule changes, relatively large geographical territories per service representative, or dense city areas. Oracle Scheduler must first be installed, to activate the Intelligent and Window to Promise options.

When the Oracle Scheduler is installed, the Assignment Manager, either with Intelligent or Window to Promise options, searches for qualified resources based on predefined criteria for a field service task. The qualified resources information is then passed to Oracle Scheduler. Scheduler calculates the travel time and distance to resources based on territories and predefined constraints. Constraints are defined as costs to meet your business needs, therefore, travel time is calculated as an additional cost to add a task or to an engineer's trip.

When a task can be performed by more than one service representative, use Intelligent and Window to Promise options to decide which representative can perform the task most efficiently.

Territory Manager

Territories defined in the Territory Manager are used to provide resources for a task or document. This assistance is done through the transaction qualifier and qualified resources identified in a territory. The functionality of transaction qualifiers is to help a territory win over competitions between territories. The qualified resources in the winning territories can then be assigned to a task or document.

An Example:

Bob Black and Jack Green are the qualified resources in the West Coast Territory. When a support manager tries to assign an open a service request to the proper resources located in the West Coast, she uses territories to assist Assignment Manager in the selection. If the West Coast Territory happens to be the winning territory, then Bob and Jack are listed in the Resource region in the Assignment Manager window. The support manager can assign either one to the service request based on their availability and customer needs.

Calendar

After a preferred or qualified resource is identified, the next important criteria to consider is the availability of that qualified resource. Use Calendar to determine resource availability information through the defined shift schedules. Resource availability for a specific time frame is determined by a task planned start and end date. After a task or document has been assigned to a resource, this designated resource becomes unavailable in the Gantt chart viewed from the Assignment Manager window.

An Example:

Continuing from the previous example used with Territory Manager, the support manager notices that the service request must be completed by next week, and it could take four hours (planned duration) to complete the task. She checks resource availability in the Assignment Manager window for the next week's time frame and discovers that Jack is available, but Bob is unavailable until next month. Therefore, Jack is selected for the job based on next week's availability even though both are qualified. The support manager updates the time line for four hours work to Jack.

Assigning Process

The process of selecting a qualified resource is based upon selection criteria and customer selections. To make these criteria effective, some requirements need to be met.

To understand the process for assigning documents and availability, the following is explained in more detail:

- Assignment Manager Dependencies
- Assignment Manager Selection Criteria

Assignment Manager Dependencies

To make optimal use of Assignment Manager's capability of assigning ownership and availability, the following table describes required dependencies.

Dependencies

Dependency	Description
Preferred Resource Information	A preferred resource is a single person or a resource group that is defined in Oracle Contracts or recommended from the Install Base in Oracle Service. When there is no preferred resource, use the Assignment Manager setup screen to define a relation between document source and resource definition.
Territory Definition	Territories are defined in Territory Manager. A territory has resources or resource groups assigned to it. For more information, see the module Territory Manager.
Task Duration Information	Task duration is essential for checking the availability of the resource and for designating a resource as unavailable in the resources calendar after a task has been assigned.
Resource's Availability Information	Availability of the resource is provided by the Calendar component in which availability is defined. For more information, see the module Calendar.

Assignment Manager Selection Criteria

In addition to the requirements listed in Assignment Manager Dependencies, the following table describes the criteria Assignment Manager uses to select a qualified resource for a document or task.

Assigning Resource Availability

Criteria	Description
Preferred Resources	The first and foremost criteria the Assignment Manager considers in the assignment process.
Territories	Territories are used to retrieve all the qualified resources for the assignment from the winning territories.
Resource Availability	The availability of the resource is considered after a preferred or qualified resource, based upon territories, is selected.

Selecting Assignment Criteria

Use the following table to help you decide which options to choose when setting up assignment criteria. This is done in the Assisted window of the Assignment Manager. The following table describes the list of required criteria:

Assignment Criteria

Preferred Resources	Territories	Resource Availability	Selection Results in:
Yes	No	No	A search for the preferred resource, availability is not taken into account.
No	Yes	No	A search for a qualified resource in the selected territories, availability is not taken into account.
No	No	No	A search for an available preferred resource or territories is not taken into account.
Yes	Yes	No	A search for the preferred resource, availability is not taken into account. When no preferred resource is available, a search for a qualified resource in the selected territories is done, availability is not taken into account.
No	No	Yes	A search for a preferred resource and availability is taken into account.
No	Yes	Yes	A search for a qualified resource in the territories selected and availability is taken into account.
Yes	Yes	Yes	A search for the preferred resource or territory, availability is taken into account. If no preferred resource is available, a search for a qualified resource in the selected territories is done, availability is taken into account.

What's New In This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new UI enhancements for Assignment Manager:

- Web Availability
- Support Site Name Information

Viewing Web Availability in the Gantt Chart

Web availability is defined as a resource who has the immediate ability to attend to a service request that is assigned online. This functionality is used in the Oracle Support Services (OSS) for a service request assignment with Territory Assisted assignment option only. As this feature supports all types of individual resources (employee, party, partner, supplier contact and other) in the Resource Manager, if a resource is web available, then this resource selected by the territory assisted option should have additional symbol "***" next to the name. The resource can accept web service requests. If the resource is not web available, then no symbol appears next to the resource name. The purpose of seeing whether a resource is web available is to allow a manager to view and immediately assign a service request online.

> **Note:** The resource web availability works with Territory Assisted assignment option **only**. The available time indicates the current time, not for a specific timeframe

Support Site Name

When a resource is selected in the Assignment Manager, the support site name that the selected resource belongs to appears automatically in the Support Site Name field at the bottom of the window.

An Example

A support agent, needs to assign a technician immediately to a customer site. Viewing the list of names in the Gantt chart in Assignment Manager, he can select the resource who is immediately available to accept this job through the web. The support agent further, can select the resource who is currently available and geographically close to the customer site for the urgent request.

Terms and Definitions

The following table describes the Assignment Manager terms and definitions.

Assignment Manager Terms and Definitions

Term	Description
Assignee	An Assignee is the designated person who commits to fulfill a specific task or an assignment.

Assignment Manager Terms and Definitions

Term	Description
AM module	The Assignment Manager is a tool that helps you assign resources to a task or a document.
Assisted Assignment Option	The Assisted Assignment option is used to assign a resource to a task or a document based on predefined criteria.
Intelligent Assignment Option	The Intelligent Assignment option is used to assign the resource with the lowest cost to a task.
Unassisted Assignment Option	The Unassisted Assignment option is used to manually assign a resource to a document or task of your choice without taking predefined criteria into account.
Window to Promise Assignment Option	The Window to Promise Assignment option is used to assign a resource to a specific time slot to fulfill a task.
Control Tower	The Control Tower is a window in Field Service where you can view resource availability or assign resources to a task.
Gantt Chart	The Gantt chart provides a graphical overview of the scheduled tasks for resources.
Owner	An owner is a person (resource) who oversees a task or a document.
Web Availability	Web availability is defined as a resource who has the immediate ability to attend to a service request that is assigned online.

Assignment Manager Process Flow

The following table describes the order and process of implementing, using, and administering the Assignment Manager.

Assignment Manager Process

Step	Description	Required	Performed By
Verify installation and functioning of TCF Server	The Thin Client Framework Server connects to Scheduler and aids the Gantt chart to display and render.	Yes	Implementor
Verify installation and functioning of Scheduler	It is used to show the lowest cost resources and travel time information for a resource while using the Intelligent and Window to Promise assignment options.	Optional	Implementor
Verify installation and functioning of Territory Manager	Territory Manager ensures transaction qualifiers are set up correctly and qualified resources are specified in a territory.	Yes	Implementor
Verify installation and functioning of Calendar	Calendar provides the work shift information for a resource.	Yes	Implementor
Verify installation and functioning of Oracle Contracts	Assignment Manager retrieves preferred engineers or groups defined in Oracle Contracts.	Yes	Implementor
Verify installation and functioning of Service Request	Service Request uses Assignment Manager to assign a resource through the Intelligent and Window to Promise assignment options.	Yes	Implementor
Verify installation and functioning of Install Base	Assignment Manager can assign preferred engineers or groups defined in Install Base.	Yes	Implementor
Set up system profile options	Setting up profile options allows Assignment Manager to retrieve the preferred resource information.	Yes	Implementor
Assisted Assignment Option	The Assisted Assignment option is used to assign a resource to a task or a document based on predefined criteria.	Yes	All Users
Unassisted Assignment Option	The Unassisted Assignment option is used to assign a resource to a document or task without taking predefined criteria into account.	Yes	All Users
Intelligent Assignment Option	The Intelligent Assignment option is used to assign the resource with lower cost to a task.	Optional	All Users
Window to Promise Assignment Option	The Window to Promise Assignment option is used to assign a resource to a specific time slot to fulfill a task.	Optional	All Users

Tips

The following tips may help you in the use of Assignment Manager. Assignment Manager supports the following resource categories used in Resource Manager:

- – Employees
- – Parties
- – Partners
- – Groups
- – Teams
- – Supplier Contacts

Refer to Resource Manager for detailed information on resource categories.

- If the Unassisted assignment option is selected, predefined selection criteria will not be available.
- Shift schedules, which are used in the Gantt Chart, are defined in Foundation Calendar.
- You can use the profile option in the **Task Manager > Default Task Owner** to set the default to a specific owner for a stand-alone task or a task associated to a service request.

Using Assignment Manager

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

- Getting Started
- Assigning Options
  - Unassisted Assignment Option
  - Assisted Assignment Option
  - Intelligent Assignment Option
  - Window to Promise Assignment Option
- Assigning Resources in the Gantt Chart

Getting Started

The Assignment Manager module is embedded within Foundation or other CRM products. It is not used as a stand-alone module and is only accessible through other CRM applications, such as Customer Support and Field Service, and Foundation modules, such as Task and Escalation Managers.

If accessing from the Task Manager, you can click the Assignment Manager icon as indicated above in the Task Details window to launch the Assignment Manager.

Use Assignment Manager to perform the following tasks:

1. Assignment Options
2. Selecting the Assignment Criteria
3. Assigning Resources Using the Gantt Chart

Note: Save your task first before launching the Assignment Manager. Otherwise, the task start and end date information will not automatically populate in the Document Details region.

Assignment Options

Choose one of the following options for assigning tasks:

- Unassisted Assignment Option
- Assisted Assignment Option
- Intelligent Assignment Option
- Window To Promise Assignment Option

Unassisted Assignment Option

Perform the following steps to use the Unassisted option to assign responsibility to a resource of your choice, without using the criteria set and the features of Oracle Scheduler. The Gantt chart displays tasks previously assigned in blue. Move your cursor over a task to view details.

Prerequisites

The Thin Client Framework (TCF) server must be configured correctly and up and running in order for the Gantt chart to work properly.

Steps

1. Navigate to the Assignment Manager window.
2. Select the **Unassisted** option from the Selection Criteria.
3. Make an entry in the Resource Partial Name or Resource Type field.
4. Click **Search**.

   The Gantt chart for the resource or resources found is displayed.
5. Double-click on the preferred resource.

   The selected resource appears below the Gantt chart.
6. Enter the preferred Start Time and End Time.

7. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without saving your changes.

Assisted Assignment Option

Perform the following steps to use the Assisted option to assign responsibility to a resource based upon the selection criteria. The Gantt chart displays those tasks that have already been assigned in blue and plan options in green. Move your cursor over a task to view details.

Prerequisites

- The Thin Client Framework (TCF) server must be configured correctly and up and running in order for the Gantt chart to work properly.
- Oracle Contracts must be installed.
- Oracle Install Base must be installed.
- Territory Manager must be installed.

Steps

1. Navigate to the Assignment Manager window.
2. Select the **Assisted** option from the Selection Criteria.

   The Gantt chart for the qualified resource appears.
3. If the Gantt chart is empty, then adjust the Selection Criteria and click **Search**.
4. Double-click on the resource with the preferred Start and End Time.

   The selection appears below the Gantt chart.
5. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without saving your changes.

Intelligent Assignment Option

The Intelligent option is only available when Oracle Scheduler is installed. The Gantt chart displays resources with costs, assigned tasks (in blue), and travel time (in white.) Move your cursor over a task to view details.

Perform the following steps to use the Intelligent option to assign a task to a resource.

Prerequisites

The Thin Client Framework (TCF) server must be configured correctly and up and running in order for the Gantt chart to work properly.

- Oracle Scheduler must be installed.
- Territory Manager must be installed.

Steps

1. Navigate to the Assignment Manager window.
2. Select the **Intelligent** option from the Selection Criteria.

   The Gantt chart for the qualified resource or resources displays a related cost.
3. If the Gantt chart is empty, then adjust the Selection Criteria and click **Search**.
4. Double-click on the resource with the preferred Start and End Time.

   The selection appears below the Gantt Chart.
5. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without saving your changes.

Guidelines

The resource with the lowest cost related to the assignment is in most cases the best option to select. The first available time appears in green on the Gantt chart.

Assigning with the Window To Promise

Perform the following steps to use the Window To Promise option to assign a time slot to a customer.

Prerequisites

The Thin Client Framework (TCF) server must be configured correctly and up and running in order for the Gantt chart to work properly.

- You must have Oracle Scheduler installed.
- You must have Territory Manager installed.

Steps

1. Navigate to the Assignment Manager window.
2. Select the **Window To Promise** option from the Selection Criteria.

   Possible time slots with related cost are displayed.
3. If the Gantt chart is empty, then adjust the Selection Criteria and click **Search**.
4. Select the preferred time slot by checking it.

   The selection appears below the Gantt chart.
5. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without saving your changes.

Guidelines

The time slot with the lowest cost related to the assignment is in most cases the best option to offer your customer.

Assigning Resources in the Gantt Chart

Perform the following steps to assign resources in the Gantt Chart.

Prerequisites

The Thin Client Framework (TCF) server must be configured correctly and up and running in order for the Gantt chart to work properly.

Steps

1. Navigate to the Assignment Manager window.

2. Double-click on the resource that you are going to assign to a task or a document.

   The selected resource name, resource type, start and end time information populates automatically.

3. You can manually change the start and end time, and the date, before clicking **OK** to commit the assignment

> **Note:** The start and end time information is based on the resource first availability for a specific task time frame. If the selected resource has shift schedule defined in Calendar, and the assigned shift is within the task time frame, then the start and end time is based on the assigned shift time.

Understanding Task Manager (HTML)

This topic group provides overviews of the Calendar application and its components, as well as explanations of key concepts, features, and functions. This section covers the following topics:

Task Manager Overview

All Oracle CRM products use the Task Manager for task management capabilities. It provides an effective mechanism for organizations to use to respond to customer's needs in a timely manner. Use the Task Manager to create, assign, schedule, prioritize, and manage all your tasks. Typically, you access the Task Manager directly to create personal tasks or view tasks assigned to you. It can be called from other Oracle modules to provide integrated solutions or it can be run as a stand-alone product. For example, Telesales uses Task Manager to assign tasks pertaining to individual consumers, organizations, and organizational contacts.

Using Task Manager, you can create new tasks, update tasks, or assign tasks. You can accept an assigned task, finish the task, and create a new task. If you refuse or reassign a task to another employee, the task can generate a series of notifications for other users or managers. Tasks not performed in a specified amount of time, can be set up to go through an escalation process.

What is a Task?

A task is the lowest unit of work. For example, a task can be a follow-up action or a daily work assignment. In another example, a support manager of a company may want to create a task for an employee stating, “Please call back customer by 9:00 am.” This task details that the employee needs to call back the customer.

A task includes information relating to actions such as resources, appointments, references, dates, contacts, recurrences, and events. You must assign a task to an individual or object. For example, once the support manager has created the task to call back the customer, he can:

- Assign a specific resource to perform the task
- Reference source documentation such as a service request
- Establish new tasks to reoccur during a specific interval such as every day

Task Manager Roles

Task Manager roles provide security for a task by ensuring only those directly involved with the task, can view it. The following table describes Task Manager Roles.

Rights of Roles

Roles	Description	Rights
Creator	The originator of a task who may or may not be involved in the task.	The creator information automatically defaults to a role of owner. As a creator you can: ■ View and modify your tasks. ■ Soft delete your task. ■ Assign an owner or assignee to the task.

Rights of Roles

Roles	Description	Rights
Owner	The person who is in charge of the task.	The owner can reassign ownership to other resource types. When the task is reassigned to others, the owner may no longer view the task unless they are an assignee. As an owner you can: ■ Read your task. ■ Update all fields in the task except the following: Auto populated fields: Escalation level, Escalation owner Contact information. ■ Soft delete your task.
Assignee	The person who is actually working on the task.	The assignee can reassign ownership to other resource types. As an assignee you can: ■ Read your task. ■ Update all fields in the task except the following: Auto populated fields: Escalation level, Escalation owner Contact information. ■ Soft delete your task.

What's New in This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for the Territory Manager:

- This new HTML version contains nearly identical functionality to the existing Forms version with the exception of task dependencies, audits, and templates.
- The HTML version also contains an additional new feature known as Mass Create, which is not available in the Forms version.

Note: Tasks created in the Forms version of Task Manager are editable in the HTML version. The same is true for tasks created in HTML.

Terms and Definitions

The following table describe terms associated with Task Manager.

Terms and Definitions

Term	Description
Assignee	An assignee is the person that is assigned to a task, which can include the owner. An assignee can accept, refuse, or reassign the task.
Contact	A contact contains information about a person and how to locate them such as their phone number and email address.
Creator	The creator is the originator of the task and defaults to the owner. However, the owner can be modified.
Full Access	Full Access provides you with the ability to read and edit, and delete the record. This access type does not include the capability of granting access to others.
Calendar	Use Calendar to effectively manage your daily activities, appointments, and tasks.
Note	Notes provide additional text locations where you can specify more detail, if needed. A note can be added to a task.
OSO	This is an acronym for Oracle Sales Online.
OMO	This is an acronym for Oracle Marketing Online.
Owner	An owner is the person that creates and is responsible for the task.
Party	A party is an entity that can enter into a business relationship.
Read-only	Read-only access provides you with read-only capability. You may NOT edit or delete any information.
Reference	A reference occurs when one task relates to another document. For example, a task can be related to a service request.
Repeating Task	A repeating task is repeated in specified time increment such as daily, weekly, monthly, or yearly.
Resource	A resource is a person, place, or thing required by multiple application components to accomplish objectives.
Source Object	The originator of the task, for example, Sales, Service, or Calendar.

Terms and Definitions

Term	Description
Tasks	A task is the lowest unit of work. Tasks are assignments that detail the actions required of company personnel or other objects.
Task Type	A task type defines the nature of the task such as a callback or a meeting.

Task Manager Rules

Task Manager has several rules it follows for security purposes:

- The owner and the assignee have full access to view and update the task.
- If a resource A gives access to another resource B for all tasks, then the privileges for tasks are not granted to resource B, except for private tasks.
- An assignee cannot delete the private task.
- Resources can search for tasks:
  - To which he is given access to.
  - That are assigned or owned by his group or team.
  - That he has a role of owner/assignee.
- The resource can view and update the task only if:
  - The resource is the owner or the assignee of the task.
  - The resource is group or team member of the owner or assignee.
  - The resource is granted access by some other resource.

> **Note:** For integration purposes, security can be modified depending on the Oracle application integrated with Task Manager. For example, Oracle Marketing Online (OMO) gives users the ability to access certain marketing objects, if they are on a team for that object. This being the case, the user is able to view all tasks created for that object whether or not they are the owner or assignee.

- The resource can delete the task only if:

– The resource is a group or team member of the owner or assignee.

– The resource is the owner or assignee of the task.

– The resource is granted to the task by some other resource.

The following table describes how task notifications are handled in Task Manager.

Task Notification

Scenario	Owner	Assignee
Task Creation	Yes	Yes
Task Deletion	Yes	Yes
Re-assign Owner	Yes	Yes
Re-assign Assignee	Yes	Yes
Assignee Updates Status	Yes	Yes
Owner Updates Task Status	Yes	Yes
Update to other fields (not status) by the owner	Yes	Yes
Owner changed his or her status	Yes	Yes
Add a New Assignee	Yes	Yes

Task User Interface HTML

The following windows are available in the Task Manager:

- Create Task
- Create Quick Task
- Task Summary
- Task Search
- Task Details
- Reference
- Assignments
- Efforts
- Recurrences

- Task Contacts
- Attachments
- Add Attachments
- Mass Create

Create Task

Use the Create Task window to create a task, define dates for the task, assign resources to the task, and relate a customer to the task. The following table describes field types in the Create Task window.

Create Task Window Description

Field Label	Field Type	Description
Create	Button	Click this button to display the Task Detail window. All values entered in the Create Task window automatically populates the corresponding fields in the Task Detail window.
Clear	Button	Click this button to clear all fields and enter new values.
Create and Create Another	Button	Click this button to display the Create Task window and create the current task and be prompted to create another.
Type	Drop-down	Use this drop-down list to select a task type.
Name	Text Field	Enter a task name (title) in this text field to identify the tasks.
Description	Text Field	Enter detailed information for the task in this text field.
Priority	Drop-down	Use this drop-down list to select a priority level.
Status	Drop-down	Use this drop-down list to assign task status at the task header level.
Category	Drop-down	Use this drop-down list to select a task category.
Private	Check Box	Select this check box to define the task as private.
Notify	Check Box	Select this check box to start a workflow process of notification sent to individuals, associated with the task.
Parent Task	Text Field	Enter a parent task for the task in this text field.

Create Task Window Description

Field Label	Field Type	Description
Go	Button	Click this button to access the lookup window to search for a parent task.
Task Time Zone	Drop-down	Use the drop-down list to select time zone information.
Use for Calendar	Option Button	Select this option button to specify which date (planned, schedule, or actual) information displays the task on the calendar.
Start Date	Text Field	Enter the planned, scheduled, and actual start date for the task in this text field.
Date Picker	Icon	Use the date picker icon to select the start date.
Start Time	Drop-down	Use the drop-down list to select the start hour for the task in the text field.
Start Time (Minute)	Drop-down	Use the drop-down list to select the minute interval for the task in the text field.
End Date	Text Field	Enter the planned, scheduled, and actual end date for the task in the text field.
Date Picker	Icon	Use the date picker icon to select the end date.
End Time (Hour)	Drop-down	Use the drop-down list to select the end hour for the task.
End Time (Minute)	Drop-down	Use the drop-down list to select the minute interval for the task in the text field.
Display on Calendar	Check Box	Select this check box to specify that you want to see task on your personal calendar.
Roles	Text Field	This read-only text field specifies the role of the owner or assignee.
Resource Type	Drop-down	Use the drop-down list to specify the resource type of the assignee. Options include: Employee, Group, or Team.
Name	Text Field	Enter the resource name in the text field.
Go	Button	Click this button to access the resource lookup tool to search for a resource name.
Status	Drop-down	Use the drop-down list to select the assignee status.
Job Title	Text Field	Enter the job title of the resource in this text field.

Create Task Window Description

Field Label	Field Type	Description
Phone	Text Field	Enter the phone number of the resource in this text field.
Email	Text Field	Enter the email address of the resource in this text field.
Customer Type	Drop-down	Use the drop-down list to select the customer type. Options include: Person, Organization, and Relationship.
Customer Name	Text Field	Enter the customer’s name in the text field.
Go	Button	Click this button to access the customer lookup window to search for the customer’s name.
Account Number	Text Field	Enter the customer account number in the text field.
Go	Button	Click this button to access the customer Account lookup window.
Customer Number	Text Field	Enter the customer number in the text field.
Go	Button	Click this button to access the customer number lookup window and search for the customer number.
Address 1	Text Field	Enter the customer’s address in the text field.
Go	Button	Click this button to access the customer lookup window and search for the customer’s address.
Phone Number	Text Field	Enter the primary phone number for the customer.
Go	Button	Click this button to access the customer lookup tool and search for the customer’s phone number.
Address 2	Text Field	This read-only text field text field automatically populates with the second line of the customer’s address, once you select a customer.
Email	Text Field	This read-only text field text field automatically populates with the customer’s email address once you select a customer.
Reference Type	Drop-down	Use the drop-down list to relate a task to a source object type.
Name	Text Field	Enter the source object name to be associated with the task.

Create Task Window Description

Field Label	Field Type	Description
Go	Button	Click this button to access the look up tool and search for a source object name.
Description	Text Field	This read-only text field text field automatically populates with a description of the selected source object.

Create Quick Task

The Create Quick Task window is a light version of the Create Task window. You can use this window to quickly create a simple task. The following table describes field types in the Create Quick Task window.

Create Quick Task Window Description

Field Label	Field Type	Description
Create	Button	Click this button to display the Task Detail window. All values entered in the Create Task window automatically populates the corresponding fields in the Task Detail window.
Clear	Button	Click this button to clear all fields and enter new values.
Create and Create Another	Button	Click this button to display the Create Task window and create the current task and be prompted to create another.
Type	Drop-down	Use this drop-down list to select a task type.
Name	Text Field	Enter a task name (title) in this text field to identify the tasks.
Description	Text Field	Enter detailed information for the task in this text field.
Category	Drop-down	Use this drop-down list to select a task category.
Date	Text Field	Enter the planned, scheduled, and actual start date for the task in this text field.
Date Picker	Icon	Use the date picker icon to select the start date.
Start Time	Drop-down	Use the drop-down list to select the start hour and minutes for the task in the text field.

Create Quick Task Window Description

Field Label	Field Type	Description
End Time	Drop-down	Use the drop-down list to select the end hour and minutes for the task.
Display on Calendar	Check Box	Select this check box to specify that you want to see task on your personal calendar.
Roles	Text Field	This read-only text field specifies the role of the owner or assignee.
Resource Type	Drop-down	Use the drop-down list to specify the resource type of the assignee. Options include: Employee, Group, or Team.
Name	Text Field	Enter the resource name in the text field.
Go	Button	Click this button to access the resource lookup tool to search for a resource name.
Status	Drop-down	Use the drop-down list to select the assignee status.
Reference Type	Drop-down	Use the drop-down list to relate a task to a source object type.
Description	Text Field	This read-only text field text field automatically populates with a description of the selected source object.
Go	Button	Click this button to access the look up tool and search for a source object name.

Task Summary

Use the Task Summary to view all your tasks, remove unwanted tasks, drill into the task detail window by clicking on the task name hyperlink, or create a new task by clicking on the Create button. You can also select from a list of saved searches to re-query the summary window based upon search criteria. The information that appears on the summary window is the result of your default search query.

Note: Fields may differ depending on the columns you choose to view and the order in which you choose to display them in the Task Search window.

The following table describes field types in the Task Summary window.

Task Summary Window Description

Field Label	Field Type	Description
Saved Searches	Drop-down	Use the drop-down list to select from previously saved searches and re-execute the search.
Search	Button	Click this button to automatically re-execute the search and display it in the same window.
Personalize	Button	Click this button to access the Task Search window where you can enter search requirements, and then save those requirements as a new search.
Update	Button	Click this button to save changes to tasks that you make in the search summary window.
Restore	Button	Click this button to undo any changes to the editable items in the task area.
CSV Download	Icon	Click this icon to download the information to a spreadsheet format.
Create	Button	Click this button to access the Create Task window and create a new task.
Quick Create	Button	Click this button to access the Create Quick Task window and create a simple task quickly.
Remove	Check Box	Select the check box to delete unwanted tasks.
Name	Text Field	Enter the name of the task.
Number	Hyperlink	Click this link to display the Task Details window.
Task Details	Icon	Click this button to access the Task Details window.
Private	Text Field	This read-only text field displays a check mark if the task is private.
Source	Text Field	This read-only text field displays the source of the task.
Description	Text Field	Enter a description for the task in the text field.
Source Name	Text Field	This read-only text field displays the task name in the Task Details window.
Category	Drop-down	Use the drop-down list to select the task category.
Parent Task	Text Field	This read-only text field displays the parent task.
Owner Type	Drop-down	Use the drop-down list to select the owner type.
Owner Name	Drop-down	Use the drop-down list to select the owner name.

Task Summary Window Description

Field Label	Field Type	Description
Priority	Drop-down	Use the drop-down list to select the task priority.
Recurring	Text Field	This read-only text field displays an icon if the task is recurring.
Time Zone	Drop-down	Use the drop-down list to select your Time Zone.
Planned Start Date Range	Text Field	Enter the planned start date for the task.
Date Picker	Icon	Use the date picker icon to search for a task based on the planned start date range.
Planned End Date Range	Text Field	Enter the planned end date for the task.
Date Picker	Icon	Use the date picker icon to search for a task based on the planned end date range.
Task Type	Drop-down	Use the drop-down list to select the task type.
Status	Drop-down	Use the drop-down list to select the task status.

Task Search

Use the Task Search window to create saved searches. You can personalize the search results by populating the Displayed Columns from the Available Columns in the Displayed Options section of the personalized search window. The result can also be sorted by three criteria either by ascending or descending order. Your personalized search can be saved for future use. In addition, it can be selected as a Task Summary window default. The following table describes field types in the Task Details window.

Task Search Window Description

Field Label	Field Type	Description
Saved Searches	Drop-down	Use the drop-down list to select from previously saved searches. The selected saved search name will be executed when you click the Search button.
Search	Button	Click this button to execute a search for a task.
Restore	Button	Click this button to undo any changes to the editable items in the Task Search window.

Task Search Window Description

Field Label	Field Type	Description
Clear	Button	Click this button to clear all search criteria so you can search on a new item.
Name	Text Field	Enter a task name (or title).
Number	Text Field	Enter the task number for the search.
Status	Multi-select List Box	Use the multi-select list box to select the status.
Types	Multi-select List Box	Use the drop-down list to select the task type which reflects the source of the task.
Priority	Multi-select List Box	Use the multi-select list box to select a predefined priority value.
Category	Multi-select List Box	Use the drop-down list to select the task category.
Include Private	Check Box	Select this check box to include your private tasks in the search.
Source	Drop-down	Use the drop-down list to select the source of the task.
Name	Text Field	Enter the name that corresponds with the source.
Go	Button	Click this button to access the lookup window to search for the name that corresponds with the source.
Type	Drop-down	Use the drop-down list to select the resource type that created the task.
Name	Text Field	Use the drop-down list to select a resource name
Go	Button	Click this button to access the lookup window to search for a resource name.
My Tasks	Option Button	Select this option button to assign the task to yourself.
Task with Role	Option Button	Select this option button to assign the task to another resource.
Role	Drop-down	Use the drop-down to select the role. Options include: Owner, Assignee, and All.
For	Drop-down	Use the drop-down to select the resource type.
Resource Name	Text Field	Enter the resource’s name in the text field.

Task Search Window Description

Field Label	Field Type	Description
Go	Button	Click this button to access the lookup tool to search for the resource.
Role	Drop-down	Use the drop-down to select the role. Options include: Owner, Assignee, and All.
For	Drop-down	Use the drop-down list to select the resource type.
Resource name	Text Field	Enter the resource’s name in the text field.
Go	Button	Click this button to access the lookup tool to search for the resource.
Date	Drop-down	Select the type of task you want to search for. Options include Created Start Date, Created End Date, Planned Start Date Range, Planned End Date Range, Schedule Start Date Range, Schedule End Date Range, Actual Start Date Range, Actual End Date Range,
From	Text Field	This text field displays the from date of the task once you select it from the Date Picker.
Date Picker	Icon	Use the date picker icon to search for a task based on the created end date range.
Hour	Drop-down	Use the drop-down list to select the start time hour for the task.
Minute	Drop-down	Use the drop-down list to select the start time minute interval for the task.
To	Text Field	This text field displays the to date of the task once you select it from the Date Picker.
Date Picker	Icon	Use the date picker icon to search for a task based on the planned end date range.
Hour	Drop-down	Use the drop-down list to select the end time hour for the task.
Minute	Drop-down	Use the drop-down list to select the end time minute for the task.
Type	Drop-down	Use the drop-down list to search for a task based on the customer type. Options include: account number, customer number, and customer name.
Value	Text Field	Enter the customer name or number which corresponds to the type you specified.

Task Search Window Description

Field Label	Field Type	Description
Reference Type	Drop-down	Use the drop-down list to relate the task to an object based on the source of the task.
Name	Text Field	Enter the resource name in the text field.
Go	Button	Click this button to access the lookup tool to search for the resource name.
Description	Text Field	This read-only text field automatically populates when you select the resource name.
Available Columns	Multi-select List Box	This gives you the ability to view all available columns to choose from You can click the display name and forward arrow to move it to the display column.
Displayed Columns	Multi-select List Box	This gives you the ability to view all columns that will be displayed in the Task Summary window. The items in this column appear on the search results window.
>	Button	Click this button to move the selected item in the available column to the displayed column.
>>	Button	Click this button to move all items in the available column to the displayed column.
<<	Button	Click this button to move all items in the displayed column to the displayed column.
<	Button	Click this button to move the selected item in the displayed column to the available column.
Up Arrow	Icon	Use this button to move in displayed item up in the row.
Down Arrow	Icon	Use this button to move in displayed item down in the row.
Sort Rows By	Drop-down	Use the drop-down list to select the first sort to be ascending or descending.
Then By	Drop-down	Use the drop-down list to select the second sort to be ascending or descending.
Then By	Drop-down	Use the drop-down list to select the third sort to be ascending or descending.
Number of Rows	Text Field	Enter the number of rows to appear in the Task Summary window. The value must be between 1-99.

Task Search Window Description

Field Label	Field Type	Description
Search Name	Text Field	Enter a name for the personalized query in the text field.
Save	Button	Click this button to save your new search.
Save and Search	Button	Click this button to save your new search and run the search.
Use as Summary Page Default	Check Box	Select the check box to have the search execute upon opening the Task Summary window.
Use as Default Query for Combo View	Check Box	Select the check box to have the search execute upon opening the Combination window in Calendar.

Task Details

From the Main Task Details window you can:

- Assign resources to a group or team
- Define repeating tasks
- View and defining contacts
- Add attachments
- Add notes to the task detail
- Mass creating tasks

Any applicable values entered on the Create Task window, such as, task type or task name, are carried over to the Task Details window. The following table describes field types in the Task Details window.

Task Details Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Update	Button	Click this button to update the task details.
Restore	Button	Click this button to refresh the window and revert back to the original values.

Task Details Window Description

Field Label	Field Type	Description
Type	Drop-down	Use the drop-down list to select the Task type.
Name	Text Field	Enter a task name (title) in the text field.
Description	Text Field	Enter detailed information about the task in the text field.
Priority	Drop-down	Use this drop-down list to select a priority level.
Status	Drop-down	Use this drop-down list to assign task status.
Category	Drop-down	Use this drop-down list to select a task category.
Private	Check Box	Select this check box to define the task as private.
Notify	Check Box	Select the check box to start a workflow notification if the task is modified.
Parent Task	Text Field	Enter a parent task for the task in this text field.
Go	Button	Click this button to access the lookup window to search for a parent task.
Escalation Level	Text Field	This read-only text field displays escalation level information added to a task through the forms based module. This information automatically populates the text field when the task selected.
Escalation Owner	Text Fields	This read-only text field displays escalation owner information added to a task through the forms based module. This information automatically populates the text field when the task selected.
Task Time Zone	Drop-down	Use the drop-down list to select the time zone information.
Use for Calendar	Option Button	Select this option button to specify which date (planned, scheduled, or actual) information will be used to display the task on the calendar.
Start Date	Text Field	Enter the planned, scheduled, or actual start date for the task in this text field.
Date Picker	Icon	Click this icon to select the planned, scheduled, or actual start date for the task.
Start Time (Hour)	Drop-down	Use the drop-down list to select the start hour for the task in the text field.
Start Time (Minute)	Drop-down	Use the drop-down list to select the start time, in minutes for the task in the text field.

Task Details Window Description

Field Label	Field Type	Description
End Date	Text Field	Enter the planned, scheduled, or actual end date for the task in the text field.
Date Picker	Icon	Click this icon to select the planned, scheduled, or actual end date for the task.
End Time (Hour)	Drop-down	Use the drop-down list to select the end hour for the task.
End Time (Minute)	Drop-down	Use the drop-down list to select the end time, in minutes for the task in the text field.
Display on Calendar	Check Box	Select this check box to specify that you want to see task on your personal calendar.
Customer Type	Drop-down	Use the drop-down list to select the customer type. Options include: Person, Organization, and Relationship.
Customer Name	Text Field	Enter the customer's name in the text field.
Go	Button	Click this button to access the customer lookup window and search for the customer's name.
Account Number	Text Field	Enter the customer account number in the text field.
Go	Button	Click this button to access the customer lookup window and search for the account number.
Customer Number	Text Field	Enter the customer number in the text field.
Go	Button	Click this button to access the customer lookup window.
Address 1	Text Field	Enter the customer's address in the text field.
Go	Button	Click this button to look up the customer's address.
Phone Number	Text Field	Enter or search for the contact point, such as a home phone, cellular phone, or secretary phone, to be used for this customer.
Go	Button	Click this button to access the customer lookup window to search for the customer phone number.
Address 2	Text Field	This read-only text field automatically populates once the address is selected.

Task Details Window Description

Field Label	Field Type	Description
Email	Text Field	This read-only text field automatically populates once the customer is selected.

Reference

Use the Reference window to relate a task to a business object, such as a marketing campaign. The Reference table is automatically expandable to accommodate multiple resources. The following table describes field types in the Reference window.

Reference Window Descriptions

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Update	Button	Click this button to update the Reference table. Any items that have been selected to be removed should disappear.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Remove	Icon	Select the check box next to the Reference objects to remove them from the table.
Type	Text Field	This read-only text field displays the related object.
Name	Text Field	This read-only text field displays the name of the related object.
Go	Button	Click this button to access the Lookup window to look up a customer. Upon selecting a name from the Lookup window, you access the task Reference window with the selected name entered as a Reference object.

Reference Window Descriptions

Field Label	Field Type	Description
Description	Text Field	This read-only text field displays a text description of the related object.

Assignments

A task can be assigned to one or many resource of types employee, groups, or team. Not all assignees have to play an active roll for the task. For example, an assignee with a role of owner may only supervise the task. All assignees can choose to have the task display on their personal calendar. There can be only one owner to a task at a time. The following table describes field types in the Assignments window.

Assignments Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Update	Button	Click this button to update the Assignments window after changes are made.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Remove	Icon	Click the icon to clear the row.
Roles	Text Field	This read-only text field displays the role of the type (owner or assignee).
Display on Calendar	Check Box	Select this check box to specify that you want to see the task on your personal calendar.
Resource Type	Drop-down	Use the drop-down list to specify the resource type of the assignee.
Name	Drop-down	Enter the resource name in the text field.
Go	Button	Click this button to access the lookup tool to search for a resource.
Status	Drop-down	Use the drop-down list to select the assignee status.
Job Title	Text Field	This read-only text field displays the job title of the resource.

Assignments Window Description

Field Label	Field Type	Description
Phone	Text Field	This read-only text field displays the phone number of the resource.
Email	Text Field	This read-only text field displays the email address of the resource.

Efforts

Use the Efforts window to specify the level of planned and actual efforts for a task. The values entered are for information only and do not trigger a workflow. The following table describes field types in the Efforts window.

Efforts Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Effort Duration	Text Field	Enter the numeric effort of the task.
UOM	Drop-down	Use the drop-down list to select the unit of measure for the effort. Options include: Minutes, Hours.
% Complete	Text Field	Enter the percent complete for the task in the text field.
Planned Effort	Text Field	Enter the planned effort for the task in the text field.
Actual Effort	Text Field	Enter the actual effort for the task in the text field.

Repeating

Use the Repeating window to schedule tasks to occur automatically. Examples of intervals include daily, weekly, or monthly occurrences. Depending on your business needs, you may want to create a series of tasks for a specified date in one window. These tasks can be selected to repeat in any combination. To schedule repeating tasks, you must either specify a start date and the number of tasks to create or the end date. The dates of the tasks are populated as the start and end dates. Use the count field to specify how many times the task should repeat. The following table describes field types in the Repeating window.

Repeating Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Start Date	Text Field	This read-only text field displays the start date for the repeating task.
End Date	Text Field	Enter the end date for the repeating task.
Count	Text Field	Enter the number of days you want the task to repeat. The default count is set at 10. You can select either an end date or a count but not both.
Date Picker	Icon	Click the icon to access the micro-monthly calendar to select a start date for the repeating task.
Date Picker	Icon	Click the icon to access the micro-monthly calendar to select an end date for the repeating task.
None	Option Button	Select the None option button to indicate that you do not have a repeating task.
Daily	Option Button	Select the Daily option button to specify that you want the task to repeat on a daily basis. Once selected, you can select the daily frequency options for the number of days and the end date.
Every_Day	Text Field	Enter the number of days for the task to repeat. The default is set at 1.
Weekly	Option Button	Select the Weekly option button to repeat the task on a weekly basis. You can select the frequency options for the weekly frequency, the days to include, and the date to end.
Every_Week	Text Field	Enter the number for the frequency to repeat, for example, every two weeks or every week. The default is set at 1.
Days	Multi-select List Box	Select the specific days to include for weekly repeating. The default is the current day it the check box cannot be deselect. However, you can select additional days.

Repeating Window Description

Field Label	Field Type	Description
Monthly	Option Button	Select the Monthly option button to repeat the task on a monthly basis. You can select the frequency options for the monthly frequency, the days to include, and the date to end.
Every_Month	Text Field	Enter the frequency to repeat of monthly repeating, for example, once a month. The default is 1 month.
On	Text Field	Enter the date for the repeating monthly appointment. The default is the current date if the Month option button is selected.
On The	Drop-down	Use the drop-down list to specify which days to include for monthly repeating.
Days	Multi-select List Box	Select the specific days to include for monthly repeating. The default is the current day it the check box cannot be deselect. However, you can select additional days.

Task Contacts

Use the Task Contacts window to manage contact information. No contacts can be created within Tasks, however, you can import a task contact. The following table describes field types in the Contacts window.

Task Contacts Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Update	Button	Click this button to save changes to tasks that you make in the search summary window.
Restore	Button	Click this button to undo any changes to the editable items in the task area.
Remove	Icon	Click the icon to clear the row.
Remove	Check Box	Select the check box to remove unwanted contact from task.
Type	Text Field	This read-only text field displays the type of contact selected. Options include: Customer and Employee.

Task Contacts Window Description

Field Label	Field Type	Description
Name	Text Field	Enter the contact’s name in the format of Title, Last name, and First name.
Go	Button	Click this button to go to the contact lookup window where you can select the contact name and contact points.
Phonebook	Edit Text Field	Enter the contact’s phone number.
Go	Button	Click this button to go to the Phonebook lookup window. Once selected, the new number populates the field.
Email	Hyperlink	Click the link edit the contact’s email address information.
Go	Button	Click this button to access the Email Address lookup window. Once selected, the email populates the field.
Primary	Option Button	Select the option button to indicate the primary contact.

Attachments

Use the Attachment feature to link unstructured data such as images, word-processing documents, spreadsheets, or text to their application data. For example, you can link images to items or video to operation instructions. Task Manager supports the ability to add one or more attachments to a task. The attachment can be in the form of a text message, a file, or a URL. The following table describes field types in the Attachment’s window.

Attachment Window Descriptions

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Update	Button	Click this button to update the window.

Attachment Window Descriptions

Field Label	Field Type	Description
Restore	Button	Click this button to refresh the window and revert back to the original values.
Add Attachment	Button	Click this button to access the Add Attachment window to add an attachment to the task.
Remove	Check box	Select this check box to remove a username from the Multi-select List Box.
Date Added	Text Field	This field displays the date that the attachment was created.
Description	Text Field	Click this link to access the Note Details window and view the first 20 characters of the attachment and drill down to the attachment details.
File Size	Text Field	This read-only text field displays the file size of the attachment.
Data Type	Text Field	This read-only text field displays the data type for the attachment. Options include: Add Existing File, Text, File or URL.
Added By	Text Field	This field displays the user's name and resource ID of the creator of the attachment.
Attachment	Hyperlink	Click this link to view the attachment whether it is a file, a URL, or text.

Add Attachments

The following table describes field types in the Add Attachment window.

Add Attachment Window Descriptions

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.

Add Attachment Window Descriptions

Field Label	Field Type	Description
Create	Button	Click this button to create a new attachment to the note.
Clear	Button	Click this button to refresh the window without saving your changes.
Description	Text Field	Enter a text message to be attached.
Text	Option Button	Select the Text option button to indicate that the attachment is in a free-formed text format.
File	Option Button	Select the File option button to indicate that the attachment is a file.
File Name	Text Field	Enter the file location.
Browse	Button	Click this button to navigate to the file location.
URL	Option Button	Select this URL option button to attach a URL to the task.
URL Name	Text Field	Enter the URL address.

Mass Create

Use the Mass Create window to create a separate task for each of the selected resources. When you use the Mass Create feature, a new task is created for each resource in a group or team and that resource is automatically assigned as the owner of the task. Also, once the task is created, the creator of the mass created task may not perform any updates to the new task. The following table describes field types in the Mass Create window.

Mass Create Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the task.
Name	Hyperlink	Click this link to display the task details.
Create	Button	Click this button to mass create a task for every member of a group or team. Each team member will be the owner of their individual task.

Mass Create Window Description

Field Label	Field Type	Description
Type	Drop-down	Use the drop-down list to select the resource type.
Name	Text Field	Enter the name of the resource group or team in the text field.
Go	Button	Click this button to access the lookup tool and search for the name of the group or team.
Keep a Record of this Task	Check Box	Select this check box to keep a record of the task you are mass creating, otherwise, the task will not remain.
Copy Notes	Check Box	Select this check box to keep a copy of any notes attached to the task.

Notes and Calendar Integration

Use Calendar to effectively manage your daily activities, appointments, and tasks. The user can click the hyperlink for the task, appointment, or event and access the details for that specific object. The key fuctionality of the Calendar includes:

- Viewing Your Calendar
- Managing Appointments

A note is a record of descriptive information that has been generated by users and can be referenced. The Notes module can be used to add additional information to an appointment. The key fuctionality of Notes include:

- Searching for a Note
- Creating a Note
- Attaching a Document to a Note
- Viewing all Notes
- Viewing a Summary of a Note
- Viewing Note Details

Task Manager Process Flow

The following table describes the order and process of implementing and using the Task Manager.

Task Manager Process Flow

Steps	Description	Required	Performed By
Viewing Your Tasks	Use the Task Summary window to view your tasks.	Yes	All Users
Viewing Task Details	Use the Task Details window to view the details of a previously created task.	Optional	All Users
Creating Saved Searches for Task	Use the Task Search to create personalized saved searches that you can use to search specific tasks.	Optional	All Users
Creating Tasks	Use the Create Task window to create a task.	Yes	All Users
Relating Tasks to Business Objects	Use the Reference window to relate a task to a business object, such as a marketing campaign.	Optional	All Users
Assigning Tasks	Use the Assignments window to assign the task to a resource.	Yes	All Users
Defining Task Efforts	Use the Efforts window to manage your task efforts.	Optional	All Users
Creating Repeating Tasks	Use the Repeating window to create a repeating task.	Optional	All Users
Managing Task Contacts	Use the Contacts window to manage and import task contacts.	Optional	All Users
Viewing, Creating, and Adding Attachments.	Use the Attachments window to view, create, and add an attachment to a task.	Optional	All Users
Working with Notes	Use Notes to add more details to your task.	Optional	All Users
Working with Calendar	Use Calendar to effectively manage your daily activities, appointments, and tasks. It provides Oracle products with the ability to show specific campaigns, events, event collateral and collateral in a calendar view format.	Optional	All Users
Mass Creating Tasks	Use the Mass Create window to create a separate task for each of the selected resources.	Optional	All Users

Understanding Task Manager (Forms)

This topic group provides overviews of the Calendar application and its components, as well as explanations of key concepts, features, and functions. This section covers the following topics:

- Task Manager Overview
- What is a Task?
- Task User Interface
- Task Templates
- Task Group Templates

Task Manager Overview

All Oracle CRM products use the Task Manager for task management capabilities. It provides an effective mechanism for organizations to use to respond to customer's needs in a timely manner. Use the Task Manager to create, assignee, schedule, prioritize, and manage all your tasks. Typically, you access the Task Manager directly to create personal tasks or view tasks assigned to you. It can be called from other modules to provide integrated solutions or can be run as a stand-alone product.

Using Task Manager, you can create new tasks, update tasks, or assign tasks. You can accept an assigned task, finish the task, and create a new task. If you refuse or reassign a task to another employee, the task can generate a series of notifications for other users or managers. Tasks not performed in a specified amount of time, can need to go through an escalation process.

What is a Task?

Tasks are assignments that detail the actions required of company personnel. For example, a support manager of a company may want to create a task for an employee stating, “Please call back customer by 9:00 am.” This task details that the employee needs to call back the customer.

A task includes information relating to actions such as resources, dependencies, references, dates, contacts, repeating tasks, and events. You must assign a task to an individual or object. For example, once the support manager has created the task to call back the customer, he can:

- Assign a specific resource to perform that task
- Define dependencies for that task
- Reference source documentation such as a service request
- Establish new tasks to reoccur on specific interval such as everyday
- View changes to the task using an audit trail
- Define milestones

Task User Interface

The following tabs are available in the Task Manager, once you’ve created a task and click the More button:

- Task Resources
- Task Dependencies
- Task References
- Tasks Dates
- Task Contacts
- Task Recurrences
- Other Task Information
- Task Audits

Task Resources

Once a task has been created and saved, use the Resources tab to assign personnel information to a task. This window defines resource requirements, assignments, and scheduling information. For example, a resource can be an employee, a group, or a party resource.

Task Dependencies

Use the Dependencies tab to determine the order of tasks. When an action requires the creation of several tasks, setting a dependency for each task.

Task References

Once a task has been created and saved, use the References tab to link the task to different documents or to link tasks with pertinent background information.

Task Recurrences

Use the Recurrences tab to schedule tasks to occur automatically. Examples of intervals include daily, weekly, monthly, or yearly occurrences. To schedule recurring tasks, you must either specify a start date and the number of tasks to create or the end date. The dates of the tasks are populated as the planned start and end dates.

Task Dates

The Dates tab is used to identify more dates in addition to the planned dates, the scheduled dates and the actual dates. Use this tab to track task progress by entering date information after task milestones such as task creation, resource reservation, or task completion.

Task Contacts

Use the Contacts tab to create and manage multiple contacts assigned to a task. Contact information is obtained from customer information. In order to enter this information, you must identify a customer in the main task window.

Other Task Information

Use the Others tab to identify additional information about the task and select different configurations for each task. Setting flags customizes each task according to your business needs. The following table describes flags located in the Others tab, which pertain to each task.

Task Flag Descriptions

Flag	Description
Currency and Cost	Currency and cost flags identify the currency of the task and if there is a cost associated with the task. These flags are used by the Marketing application.
Billable	The Billable flag signifies a task as a service that requires billing.
Holiday	The Holiday flag indicates whether the task can be performed on a holiday.
Multibook	The Multibook flag indicates whether the task can book resources that are already assigned to other tasks.
Milestone	The Milestone Flag indicates whether the task is a milestone.
Restrict Close	The Restrict Close flag indicates whether it is necessary to close the task in order for the source object to be closed. For example, if this task references a service request, the task would have to be closed to close the service request.

Task Audits

Use the Audits tab to view changes that are made to the task. The task audit record documents the date and history of the task change. Each update to a task results in an entry to the task audit record. Each record provides a trail from the original task creation to the current task status. Each row documents the status of each task change every time the task is saved. The bottom row contains the most recent task record.

Task Templates

A task template is a skeleton task. Creating tasks from a template eliminates interaction with the specific properties of a task and makes task creation simple and quick. Once the task template has been defined, you can specify resource types to this template, create dependencies, and schedule repeating tasks.

Task Template Groups

A task template group is a grouping of different task templates defined in the Setup Task Template Groups window during the task setup. This task template group allows users to pre-define multiple commonly used tasks for different activities (document type), such as service requests, escalations, task, sales opportunity, and so on. When creating tasks from a task template, users can select appropriate template group to generate tasks simultaneously.

Using Task Manager (HTML)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser.

Ensure that you are viewing the correct information for your software.

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications. This section covers the following topics:

- Getting Started
- Logging into Task Manager
- Using the Quick Find Search
- Viewing Task Information
  - Viewing the Task Summary
  - Customizing Your Task Summary Display Options
  - Selecting Sort Options
  - Personalizing Your Saved Searches
  - Viewing Task Details

- Managing Tasks
  - Creating a Task
  - Associating a Task with a Customer
  - Relating Appointments and Tasks to Source Objects
  - Assigning a Resource to a Task
  - Specifying the Task Effort
  - Creating a Repeating Task or Appointment
  - Mass Creating Tasks
- Managing Task Contacts
  - Viewing Task Contact Information
  - Defining Task Contacts
- Managing Attachments
  - Viewing Existing Attachments
  - Adding an Attachment
- Working with Notes
- Working with Calendar
- Defining Your Preferences

Getting Started

Typically, the following procedures are performed in Task Manager in no particular order.

- Use the Task Summary window to view your tasks.
- Use the Task Search window to create personalized saved searches that you can use to search specific tasks.
- Use the Create Task window to create a task.
- Use the Task Details window to view and update a previously created task.
- Use the Reference window to relate a task to a business object, such as a marketing campaign.
- Use the Assignments window to assign the task to a resource.

- Use the Efforts window to manage your task efforts.
- Use the Repeating window to create a repeating task.
- Use the Contacts window to manage and import task contacts.
- Use the Attachments window to view, create, and add an attachment to a task.
- Use Notes to add more details to your task.
- Use Calendar to manage and schedule your tasks.
- Use the Mass Create window to create a separate task for each of the selected resources.

Logging into Task Manager

There are several ways to access Task Manager. It can be run as a stand-alone module where typically, users access Tasks directly to create personal tasks or it can be called from other modules to provide integrated solutions. You can also access the Task Manager through the HTML Calendar module from a link on the main navigation bar. The following CRM modules use the Task Manager to create and manage tasks:

- Oracle Field Service (Forms)
- Oracle Marketing Online (HTML)
- Oracle Sales Online (HTML)
- Oracle Service (Forms & HTML)
- Oracle Telesales (Forms)

Each module should have an individual login and display a Task tab upon access. Perform the following steps to log into Task Manager.

Prerequisites

You must be an employee type resource to use calendar.

Steps

1. Navigate to one of the listed modules.
2. Enter your user ID.
3. Enter your password and click **Go**.
4. Click the Task tab.

The Task Summary window opens with a list of your current tasks.

Using the Quick Find Search

Use the quick find search to find your appointments, tasks, and notes. Perform the following steps to execute a search.

Prerequisites

None

Steps

1. Using the Quick Find drop-down list, select search criteria:
   - Appointment
   - Task
   - Notes
2. Enter a keyword or character for the search (at least three characters). To search for all groups, enter "%%%" and click **Go**.

   The Search Results window opens.
3. Click any item to display the details.

Viewing the Task Summary

Use the Task Summary to:

- View a list of your tasks
- Update tasks
- Create a new task
- Create a Quick Task
- Remove a task
- Select to display another saved search
- Display task details

The information in the Task Summary is the result of your default search query. Perform the following steps to view the Task Summary window.

Note: Use the First, Previous, Next, and Last links at the bottom of the window to view all of your existing tasks.

Prerequisites

You must be the owner, assignee, or have been granted access to a task in order to view it.

Steps

1. Click **Tasks** on the main navigation bar.

   The Task Summary window opens with a list of your editable tasks.

2. To view a previously saved search, select it from the Saved Searches drop-down list and click **Search**.
3. Click **Create Quick Task** to create a simple task.
4. Click the CSV icon to download the page to a spreadsheet format.
5. Click on any table heading, except for flexfields, to sort the corresponding column.
6. Click any hyperlink or click the Task details icon to view the task's details.

   The saved search in displayed in the window.

See Also

Customizing your Task Summary Display Options

Customizing Your Task Summary Display Options

Use the Task Search window to define display options for the Task Summary window. Perform the following steps to view the details of a specific task.

Prerequisites

A task must already exist.

Steps

1. Click **Personalize** in the Task Summary window.

   The Task Search window opens.

2. Use the drop-down list to select the Saved Search you want to modify.
3. Scroll down to the Display Options region.
4. Select which columns you want to appear in the window. To select multiple columns, hold down the [Ctrl] key and select each column.
5. When you are finished selecting the columns you want, click > to move them to the displayed column.

Selecting Sort Options

Use the Task Search window to define how you want the rows of tasks to sort in the Task Summary window. Perform the following steps to view the details of a specific task.

Note: It is mandatory to display either the task name or the task number fields. If you remove both of these columns, the system will display the task Name automatically.

Prerequisites

A task must already exist.

Steps

1. Click **Personalize** in the Task Summary window.

   The Task Search window opens.
2. Use the drop-down list to select how you want your rows of tasks to sort.
3. Use the corresponding drop-down list to select whether you want the list to sort in descending or ascending order.
4. Use the drop-down list to select the next type of sort (Then by).
5. Use the corresponding drop-down list to select whether you want the list to sort in descending or ascending order.
6. Use the drop-down list to select the next type of sort (Then by).
7. Use the corresponding drop-down list to select whether you want the list to sort in descending or ascending order.
8. Enter the number of rows you want to display in the Task Summary window.

See Also

- Viewing the Task Summary
- Personalizing Your Saved Searches

Personalizing Your Saved Searches

Use the Task Search window to create a personalized saved search. You can personalize your search results in four ways:

- You can create search criteria and save it as a personalized search.
- You can select only the columns you want to display in the Task Summary window.
- You can sort records in ascending or descending order.
- You can specify how many rows of task records you want to display in the Task Summary window.

Prerequisites

None

Steps

1. In the Task Summary window, click **Personalize**.

   The Task Search window opens.

2. Enter the following information:

   a. Enter the Task Name.

   b. Enter the Task Number.

   c. From the Status multi-select list box, select the task status.

   d. From the Type multi-select list box, select the task type.

   e. From the Type multi-select list box, select the task priority.

   f. From the Type multi-select list box, select the task category.

   g. Use the drop-down list to select the source.

   h. Select the Include **Private** check box to include your private tasks in your search.

i. Enter the name that corresponds to the source or click **Go** to access the lookup window and search for the name.

3. Under the Created By region, use the drop-down to select the Resource Type that created the task.
4. Enter the Resource name or click **Go** to search for the resource name.
5. Enter the following information under the Assignments region:
   a. Select the My Tasks option button if you are searching for tasks assigned to you or select the Task with Role option button to search for tasks assigned to another owner or assignee.
   b. Use the drop-down list to select the role. Options include: All, Assignee or Owner.
   c. Use the drop-down list to select the Resource Type.
   d. Enter the Resource name or click **Go** to access the lookup tool and search for the name.
   e. If you want to enter additional search criteria, repeat steps b - d in the provided fields.
6. In the Dates and Times region, define the following information:
   a. Use the drop-down to select the task type used for calendar. Options include planned, scheduled, or actual.
   b. Click the **Date Picker** next to the from text field to select the date range for the task.
   c. Use the drop-down lists to select both the hour and minute the task began.
   d. Click the **Date Picker** next to the to text field to select the date the task ended.
   e. Use the drop-down lists to select both the hour and minute the task ended.
7. Enter the following customer information:
   a. Use the drop-down list to select the customer type. Options includes: Customer Name, Customer Number, or Account Number.
   b. Enter the Customer Value or click **Go** to access the lookup tool to search for the value.
8. Enter the following reference information:
   a. Use the drop-down to select the resource type.

   b. Enter the Resource name or click **Go** to access the lookup tool and search for the resource name.
   c. Enter a description for the indicated reference.
9. See the following for additional information on the remaining tables of the Task Search window:
   a. To define display options, see Customizing your Task Summary Display Options.
   b. To enter customer information, See Associating a Task with a Customer.
   c. To enter customer information, See Selecting Sort Options.
10. Select any of the following check boxes to add additional information to your saved search.
    - Select the **Use as Summary Page Default** check box to have the search execute upon opening the Task Summary window.
    - Select the **Use as Default Query for Combo View** check box to have the search execute upon opening the Combination window in Calendar.
11. Click **Save** to save the personalized search or click **Save and Search** to save the search and search immediately for any tasks matching the criteria you entered.

    The Task Summary window opens displaying your search results.

See Also

- Viewing the Task Summary
- Creating a Task

Viewing Task Details

Use the Task Details window to update or delete a task. Perform the following steps to view the details of a specific task.

Note: Click the source number link to view the source or the name link to view the details of the record.

Note: If a product integrated with Task Manager passes customer data into the system, the information automatically populates the customer area of the Task Details window.

Prerequisites

A task must already exist.

Steps

1. Click **Task** on the main navigation bar.

   The Task Summary window opens.

2. Click the task name to view more information about the task.

See Also

- Viewing the Task Summary
- Creating a Task

Creating a Task

Note: If you plan on creating more than one task, click Create and Create Another once you've added all the information to the first task. This will save your task and return you to the Create Task window so you can create another task.

Note: You must set up status types in the forms module.

Prerequisites

None

Steps

1. Click **Task** on the main navigation window.

   The Task Summary window opens.

2. Click **Create**.

The Create Task window opens.

3. Define the following information.

   a. Select a Task Type from the drop-down list.

   b. Enter a name for the task.

   c. Enter a description for the task.

   d. Select the priority level for the task from the drop-down list.

   e. Select the task status from the drop-down list.

   f. Enter the resources job title.

   g. Enter the resources phone number.

   h. Enter the resources email address.

   i. Select the task category from the drop-down list.

   j. Select the **Private** check box if this is a personal task and you do not want other employees to view it.

      Any resource associated with the task, for example an assignee, will have access to the task whether it is marked as private or not.

4. Enter a parent task for the task or click **Go** to access the lookup tool.

   a. Enter at least three characters or enter "%%%" to search all tasks.

   b. Click **Search**.

      A list of tasks appears in the window.

   c. Click the task to populate the Parent Task field.

5. Select the **Notify** check box if you want to notify assignees of the newly created task.

6. See the following for additional information on the remaining tables of the Create Task window:

   a. To define a date, see Defining Dates for a Task.

   a. To define assignees, see Assigning a Resource to a Task.

   b. To enter customer information, See Associating a Task with a Customer.

   c. To relate an object to the task, see Relating Appointments and Tasks to Source Objects.

7. Click either **Create**, to create a single task or click **Create and Create Another** to return to the Create Task window in order to create another task.

See Also

- Viewing the Task Summary
- Viewing Task Details

Defining Dates for the Task

Perform the following steps to define dates when you are creating a task.

Prerequisites

None

Steps

1. Under the dates region in the Create Task window, Use the drop-down list to select the time zone for the task.
2. Select the option button that defines the use for the calendar (planned, schedules, or actual).
3. Click the **Date Picker** in the column that corresponds to the option button you selected in step 1.
4. The Select a Date pop-up window opens.
5. Use the drop-down list to change the calendar month.
6. Select a start date for the task by clicking on the date. Close the window to populate the start date field.
7. Use the drop-down list to select a start time for the task.
8. Repeat steps 2-6 to define the end date for the task.
9. Use the drop-down list to select an end time for the task.

See Also

- Personalizing Your Saved Searches
- Creating a Task

Associating a Task with a Customer

Perform the following steps to associate a task with a customer in the Create Task window.

Prerequisites

None

Steps

1. Under the customer region in either the Create Task or Task Search window, select a customer type from the drop-down list (Organization, Person, or Relationship).
2. Enter the name of the customer or click **Go** to access the customer lookup tool.
   a. Enter at least three characters or enter "%%%" to search all tasks.
   b. Click **Search**.

      A list of resources appears in the window.
   c. Click the resource name to populate the Name field.
3. Enter the customer's address or click **Go** to get a list of addresses for the customer.
4. Click the address to populate the text field. This will also populate the Address 2 text field with the city, state, and country as well as the customer number field.
5. Enter the customer's phone number or click **Go** to get a list of phone numbers for the customer.
6. Click the phone number (if any) to populate the text field.

See Also

- Personalizing Your Saved Searches
- Creating a Task

Relating Appointments and Tasks to Source Objects

See Calendar for information regarding relating tasks to Source Objects.

See Also

- Personalizing Your Saved Searches
- Creating a Task

Assigning a Resource to a Task

Use the Assignments window to assign a task to a resource. When you specify an assignment, the information appears in the Assign To region of the Task Summary window. Assigned tasks only have one owner but can have many assignees. Perform the following steps to assign multiple resources to a task from the Task Details window. The same information can also be entered in the Create Task window under the Assign To regions.

Note: You can change the owner of a task but you cannot delete the owner altogether.

Note: Click the source number link to view the source or the name link to view the details of the record.

Prerequisites

A task must already exist.

Steps

1. From the Task Details window, click **Assignments**.

   The Assignments window opens.

2. Select the **Display on Calendar** check box to display the assignment on your personal calendar.

3. Use the drop-down list to select the Resource Type.

4. Enter the name of the resource that you want to assign to the task or click **Go** to search for a resource.

   The search window opens.

   a. Enter at least two characters in the search field or enter "%%" to search all resources and click **Search**.

A list of resources appear in the window.

b. Click the resource name you want to add.

The resource name populates the text field.

5. Use the drop-down list to select the status. You must set up status types in the Task Manager Forms.

6. Enter the following information in the text fields provides:

   a. Enter the resource's job title.

   b. Enter the resource's email address.

   c. Enter the resource's phone number.

7. Click **Update**.

   The assignment information is saved.

> **Note:** If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.

See Also

- Personalizing Your Saved Searches
- Creating a Task

Specifying the Task Effort

Use the Efforts window to specify the either the planned, duration, or actual effort. Each effort is defined as follows:

- **Planned**: This is the effort required to complete a task. For example, a task requires 10 hours work and is assigned to Mary and John. Each needs to contribute five hours to complete this assignment. The planned effort to complete this task is 10 hours.
- **Duration**: This is the actual time o'clock for a task completion. For example, if Mary starts her work from 10:00 to 14:00, and John continues from 14:00 to 19:00, then the duration of this task is nine hours (10:00-19:00.) If John starts at 10:00, instead of 14:00, and finishes at 15:00, then the duration is five hours (10:00-15:00.)

- **Actual**: This is the actual effort for a task. For example, the actual effort for Mary to complete her work is four hours (10:00-14:00) and for John is five hours (10:00-15:00.)

Perform the following steps the define the Task Effort.

> **Note:** Click the source number link to view the source or the name link to view the details of the record.

Prerequisites

A task must already exist.

Steps

1. From the Task Details window, click **Efforts** in the side navigation bar.

   The Efforts window opens.

2. Enter the duration unit required to complete the task in the Duration text field.
3. Select the unit of measure (UOM) for the duration. Options include: hours and minutes.
4. Enter the percentage complete for the actual Task.
5. Enter the planned effort unit in the text field.
6. Use the drop-down list to select the UOM for the planned effort.
7. Enter the actual effort in the text field.
8. Use the drop-down list to select the UOM for the actual effort.
9. Click **Update** to save the effort.

See Also

Creating a Task

Creating a Repeating Task or Appointment

Use the Repeating window to create a series of tasks for a regularly scheduled appointment. Perform the following steps to create a repeating appointment.

Note: Click the source number link to view the source or the name link to view the details of the record.

Note: After a repeating task is created, any additional modification impacts only the next scheduled task to occur.

Prerequisites

A task must already exist.

Steps

1. In the Task Details window, click **Repeating** in the side navigation bar.

   The Repeating window opens.

2. The Start Date field is populated with the date the task was originally created. You cannot edit this date.

3. Click the **Date Picker** to access the select a date window and select an End Date for the repeating task or enter a number in the count text field to define the number of days the task should repeat.

4. Select the option button for the frequency of the repeating task. Choices include None, Daily, Weekly, and Monthly.

   a. If you select None, then the task does not repeat.

   b. If you select Daily, then enter the number of days you want the task to repeat.

   c. If you select Weekly, then enter the number of weeks and select the check box for each day you want it to occur.

   d. If you select Monthly, then enter the number of months and select the check box for each day you want it to occur.

5. Click **Update** to save your repeating task or click **Restore** to reset the original values in the window.

   A confirmation window opens confirming the repeating task was created.

See Also

Creating a Task

Mass Creating Tasks

Use the Mass Create window to create a separate task for each of the selected resources. When you use the Mass Create feature, a new task is created for each resource whether it be a a group or a team and that resource is automatically assigned as the owner of the task. Perform the following steps to mass create tasks.

Note: Click the source number link to view the source or the name link to view the details of the record.

Prerequisites

A task must already exist.

Steps

1. From the Create Task window, click **Mass Create** in the side navigation bar.
2. From the drop-down list, select the Resource Type (group or team).
3. Enter the name of the resource or click **Go** to search for the resource.
   a. Enter at least two character in the search field or enter "%%" to search all resources.
   b. Click **Search**.

      A list of resources appear in the window.
   c. Click the resource you want to add.

      The information populates the text field.
4. Select the **Keep Record** check box to save a record of the task.
5. Select the **Copy Notes** check box to create a copy of any notes attached to the task.
6. Click **Create**.

   A task for each member of the group or team is assigned and each individual becomes the owner of their task.

   A confirmation window opens confirming the task was created.

See Also

Creating a Task

Managing Task Contacts

See the following sections to view and define contact information.

- Viewing Task Contact Information
- Defining Task Contacts

Viewing Task Contact Information

Use the Task Contacts window to update, delete, and organize your task contacts. Perform the following steps to view task contact information.

Note: Click the source number link to view the source or the name link to view the details of the record.

Note: If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.

Prerequisites

You must have contacts to view.

Steps

1. From the Task Details window, click **Contacts** in the side navigation bar.
2. The Task Contacts window opens displaying your contacts.

See Also

Importing Task Contacts

Defining Task Contacts

Perform the following steps to define a contact.

Prerequisites

There must be contacts to import.

Steps

1. From the Task Details window, click **Contacts** in the side navigation bar.

   The Task Contact window opens.

2. Use the drop-down list to select the Resource Type. Options include Customer and Employee.
3. Enter the Resource Name of click **Go** to search for the Resource.
   a. Enter at least two character in the search field or enter "%%" to search all resources.
   b. Click **Search**.

      A list of usernames appear in the window.

   c. Click the resource to populate the text field.
4. Enter the resources's phone number or click **Go** and click the phone number to populate the text field.
5. Enter the email address or click **Go** and click the email address to populate the text field.
6. Select the option button of the primary contact.
7. Click **Update** to save the information.
8. Click the **Remove** icon to clear the Resource from the list.

See Also

Viewing Task Contact Information

Viewing Existing Attachments

See Calendar for information regarding Viewing Existing Attachments.

Adding an Attachment

See Calendar for information regarding Adding an Attachment.

Working with Notes

In Task Manager, you can perform the following tasks using Notes:

- Using the Notes Summary Window
- Viewing All Notes
- Viewing Note Details
- Searching for a Note
- Creating a Note
- Viewing Existing Attachments
- Adding an Attachment
- Creating Note Text (CLOB)
- Using the Reference Function

Working with Calendar

In the course of working with the Task Manager, it is sometimes necessary to use Calendar. The following are some of the functions that you can perform using Calendar:

- Viewing Your Calendar
  - Viewing Your Personal Calendar
  - Viewing Different Dates on Calendar
  - Viewing Your Tasks and Calendar Simultaneously
  - Viewing the Availability of a Resource
  - Adding a New Resource to Your Availability View
  - Viewing a Public Calendar
- Managing Appointments
  - Viewing an Appointment's Details
  - Creating an Appointment
  - Deleting an Appointment
  - Defining Attendees for an Appointment
  - Receiving an Invitation
  - Creating Repeating Appointment

- Viewing Existing Attachments
- Adding an Attachment to an Appointment
- Relating Appointments to Business Objects

Defining Your Preferences

Tasks shares some preference options with the HTML version of Calendar. Use the following links to view information regarding Task Preferences.

- Customizing Your Task Preferences
  - Changing Your Personal Preferences
  - Adding and Removing Task Categories

Using Task Manager

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser.

Ensure that you are viewing the correct information for your software.

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications. This section covers the following topics:

- Creating and Updating Tasks
- Setting Dependencies for Tasks
- Assigning and Scheduling Resources
- Scheduling Recurring Tasks
- Tracking Planned, Scheduled, and Actual Dates
- Setting Task Flags
- Documenting Multiple Contact Information
- Tracking a Task Record
- Launching Task Workflow

- Linking Tasks to Source Documentation

Creating and Updating Tasks

Tasks consist of work assignments that detail the actions required of company personnel. Perform the following steps to create or update a task.

Prerequisites

Before you create a task from a template, a template design must exist.

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, click **New**.

   The Tasks window opens.
3. Use one of the following procedures to create a task:
   a. Select the template information from the LOV for the required fields, and click **Create Tasks**.
   b. Click **Create Task from Template** to use a template.

      The Create Tasks from Template Group window opens.

      Enter your basic task information into the required fields by selecting from each LOV.
4. Save your task.
5. Click **More**.

   The Task Details window opens.
6. In the Resources tab, define Requirements by selecting from the LOV for each field.
7. In the Dependencies tab, enter the task dependencies by selecting from the LOV for each field.
8. In the References tab, enter the reference objects by selecting from the LOV for each field.
9. In the Recurrences tab, enter the recurrence rules by selecting from the option buttons and the LOV for each field.

10. In the Resources tab, enter the resource assignments by selecting from the LOV for each field.
11. Save your task.

    The new task number appears in the task spread table.
12. If you want to update a task, then perform the following steps:
    a. Navigate to Task Manager.
    b. In the Find Tasks window, enter search criteria and click **Find**.
    c. The Tasks window opens.
    d. Update information.
    e. Save your changes.

Guidelines

Clicking **Launch Workflow** in the Tasks window automatically reserves the designated resources and notifies the task owner of task creation through email.

See Also

- Designing Task Templates
- Launching Task Workflow

Setting Dependencies for Tasks

Dependencies determine the order among tasks. Perform the following steps to set task dependencies.

> **Note:** The Application Object Library: Dependency Types for task Lookups window is currently not used in Task Manager.

Prerequisites

A task must exist before you can set dependencies for it.

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Save your task.
4. Click **More**.

   The Task Details window opens.
5. In the Dependencies tab, select the dependent task number from the LOV in the Task Number field.

   The corresponding task name populates the Task Name field.
6. Enter a numerical value in the Offset field.
7. Select from the LOV in the UOM field and click **OK**.
8. Save your task.

   A task dependency now exists for the original task.

Guidelines

Use a numerical value of time in the Offset field. The Offset value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time-sensitive restrictions.

See Also

Creating and Updating Tasks

Assigning and Scheduling Resources

Define resources as the tools and personnel necessary for the completion of a task. The task owner assigns and schedules the required resources after choosing the best available options. Perform the following steps to assign and schedule resources.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Save your task.
4. Click **More**.

   The Task Details window opens.
5. In the Requirements region of the Resources tab, select from the LOV in the Resource Type field.
6. In the Assignments region, enter a numerical value in the Unit field.

   The Unit value determines the numbered amount of a particular resource.
7. Select from the LOV in the Type and Name fields.
8. If you want to schedule a resource, then select the **Schedule** check box.

   Enter scheduled distance and duration values, and select a unit of measure.
9. If you want to update actual schedule information, scroll right and enter the actual values in the required fields and click **OK**.
10. Save your task.

    Resource assignment and scheduling is complete.

Guidelines

Select the **Enabled** check box to activate varied resources according to task. Use this option to select live resources when updating. For tracking purposes, update the Actual schedule fields after task completion.

See Also

Creating and Updating Tasks

Scheduling Recurring Tasks

Schedule a task to automatically reoccur daily, weekly, monthly, or yearly. Perform the following steps to schedule recurring tasks.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Save your tasks.
4. Click **More**.

   The Task Details window opens.
5. In the Recurrences tab, select an Occurrence. Options include daily, weekly, monthly, and yearly.
6. Select from the LOV in the required fields and click **OK**.
7. Save your task.

   The task now reoccurs automatically.

See Also

Creating and Updating Tasks

Tracking Planned, Scheduled, and Actual Dates

Track task progress by entering date information after three task milestones:

- Task Creation
- Resource Reservation
- Task Completion

Use this procedure to track planned, scheduled, and actual dates.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Save your task.
4. In the Dates section, enter information into the Planned fields.

   The application populates the GMT field with the correct Greenwich Mean Time Deviation value.
5. After reserving resources for the task, enter information into the Scheduled fields.
6. Upon task completion, enter final information into the Actual fields.
7. Save your task.

   Reference date information to track task completion status.

Guidelines

Updating the Actual Start and End Dates in the Resource tab populates the corresponding Actual date fields in the main Task form.

See Also

- Creating and Updating Tasks
- Assigning and Scheduling Resources

Setting Task Flags

Use task flags to select different configurations for each task. Setting flags customizes each task according to your needs. Perform the following steps to set task flags.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Click **More**.

   The Task Details window opens.
4. In the Others tab, select task flags.

   For a detailed description of flag options, see the Task Flag Definitions table in the See Also section.
5. Click **OK**.
6. Save your task.

   The task owner receives the task flagged as a Milestone.

Guidelines

Optionally, design templates with predetermined flags.

See Also

- Creating and Updating Tasks
- Designing Task Templates

Documenting Multiple Contact Information

Associate more than one person's name and contact information with a task. Use the Contacts tab to document the complete list of contacts for a particular task while defining the primary contact individual. Perform the following steps to document multiple contact information.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Save your task.
4. Click **More**.

   The Task Details window opens.
5. In the Contacts tab, enter information into the Contacts fields.
6. Enter the corresponding telephone information into the Contact Telephones fields.
7. Select the **Primary** check box to mark the primary contact individual and click **OK**.
8. Save your task.

   The task contact information is recorded.

Guidelines

Entering multiple contacts and selecting one as the primary records the correct communication channel for the selected task.

See Also

- Creating and Updating Tasks
- Setting Dependencies for Tasks

Tracking a Task Record

The task record documents and dates the history of task change. Each update to a task results in an entry to the task audit record. The task record provides a trail from the original task through to the current task status. Perform the following steps to access the task audit record information.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Save your task.
4. Click **More**.

   The Task Details window opens.
5. In the Audit tab, view the task history.

   Each row documents the status of the task. The bottom row contains the most recent task record.
6. Scroll to the right to view the New and Old values.
7. Click **OK** to return to the Task Details window.

Guidelines

The Audit tab contains a read-only record of the task change.

See Also

Creating and Updating Tasks

Launching Task Workflow

Define workflow as the actions following a task creation or update. After creating or updating a task, you need to notify the task assignees of their involvement. The Launch Workflow feature automates this process and contacts the necessary parties.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Save your task.
4. Click **More**.

   The Task Details window opens.
5. Select the Resources tab.
6. Create an Assignee by filling in the fields from the LOV.
7. Click **OK**.
8. In the Task Details window, click **Launch Workflow**.
9. Save your task.

   Workflow triggers an email to the task owner and resource scheduler with the task creation or update information.

See Also

- Creating and Updating Tasks
- Setting Task Flags

Linking Tasks to Source Documentation

Linking a task to a source document allows you to reference pertinent background information. Define source documentation as the original request document that resulted in the creation of a task. Perform the following steps to link a task to its source document.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.

   The Tasks window opens.
3. Click **More**.

   The Task Details window opens.
4. In the References tab, select from the LOV in the Document Type field.
5. Enter the identification number of the source document in the Number field.

   The application populates the Details field with a description of the reference type.
6. Optionally, enter the type information into the Type field.
7. Click **OK**.

   The type and number information populate the Source Doc Type and Source Doc Number fields in the main task list.
8. Save your task.

   The source document now links to its corresponding task.

Guidelines

Double-clicking the Source Value field in the main task window brings up the source document for viewing.

See Also

Creating and Updating Tasks

Understanding Calendar (HTML)

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications. This section covers the following topics:

- Calendar Overview
- What's New in This Release
- Terms and Definitions
- Calendar Rules
- Types of Calendars
- Calendar Views
- Who Uses Calendar?
- Personalization and Preferences
- Managing Appointments
- Integration with Notes and Tasks
- Calendar Process Flow

Calendar Overview

Use Calendar to effectively manage your daily activities, appointments, and tasks. It also provides other Oracle products with the ability to create appointments and show specific campaigns in a calendar view format. You can also create an un-timed event area used to show three different types of data including any task that has been assigned to user or has no start or end time indicated. The user can click the hyperlink for the task, appointment, or event and access the details for that specific object. The key fuctionality of the Calendar includes viewing your tasks, subscribing yourself to a group calendar, viewing public calendars, creating and managing appointments, and inviting individuals to those appointments. The following table describes the main navigation bar links.

Navigation Bar Link Descriptions

Link	Description
Views	Click this link to access the different views (daily, weekly, monthly, yearly, or combination) of your personal calendar and to check a resource’s availability.
Tasks	Click this link to access the Task Summary window. Use this window to view all your tasks and to access the Create Task window.
Notes	Click this link to access the Notes Summary window. Use this window to create a note, search for a note, attach a document to a note, view all notes, or view details of a particular note.

What’s New in This Release

This new HTML version contains nearly identical functionality to the existing Forms version with the exception of the integration of tasks and notes.

> **Note:** If you have integrated both Calendar and Resource Manager with another Oracle product, you see both the Calendar tab and the People tab. These two modules share the following joint responsibility: CRM Application Foundation User.

Terms and Definitions

The following table describes terms and definitions associated with Calendar.

Terms and Definitions

Term	Description
Category	Use a category as a way of organizing tasks. For example, the task can be a phone call and the category could be call back customer.
OSO	This is an acronym for Oracle Sales Online.

Terms and Definitions

Term	Description
OMO	This is an acronym for Oracle Marketing Online.
Full Access	With Full Access you can read and edit/delete the record. This access type does not include the capability of granting access to others.
Read-only	With read-only access, you can only view a record. You cannot edit or delete anything.
Source Object	The originator of the task, note, or appointment; for example, Sales, Service, or Contract.
Calendar	Use Calendar to create, manage, and organize your appointments and contacts.
Party	A party is a person, group, or organization and is owned by TCA. Current physical table is HZ_PARTIES. Relates to an employee, customer, or organization that can be related to a task.
Tasks	A task is a unit of work. For example, a task consists of sending an email, calling back a customer, or attending a meeting.

Calendar Rules

Calendar has several rules it follows for security purposes:

- Every resource of type employee can use calendar.
- The creator of a calendar is the owner.
- An owner and assignee can view or edit a task's information.
- Only an owner can see his or her own private task.
- Only the owner of a calendar can grant access to that calendar.
- You can only search and view tasks that you are the owner or assignee of are granted access to.
- If the task sits at the group level, it is seen by all members of a group.

Types of Calendars

The following are the different types of calendars available for viewing in Calendar.

- Personal Calendars
- Public Calendars
- Group Calendars

Personal Calendars

Every employee has a personal calendar that they use to create or view appointments, invite resources to appointments, attach notes and tasks, and relate appointments to business objects. You can view your personal calendar for any date in several ways including: daily, weekly, monthly, yearly, or combination view. Other features of the personal calendar include checking a resource’s availability, personalizing your calendar view, and updating and soft deleting existing appointments.

Public Calendars

Use the public calendar view to display upcoming public events. Public calendars are only accessible in monthly view. You cannot update a public calendar unless you are the owner of that calendar. The difference between public and group calendars is that the user does not have to subscribe to the public calendar in order to view it. The following table describes field types in the Public View of the Calendar.

Public View Window Description

Field Label	Field Type	Description
Pick Calendar	Text Field	Enter the name of the public calendar you want to view.
Go	Button	Click this button to access the lookup tool so you can search for a public calendar.
Month	Drop-down	Use this drop-down to select which month of the public calendar you want to view.
Year	Drop-down	Use this drop-down to select which year of the public calendar you want to view.
View	Button	Click this button to view the calendar in the window.

Public View Window Description

Field Label	Field Type	Description
Backward Icon	Button	Click this button to view the previous month in the same monthly view format.
Current Month	Text Field	This read-only text field displays the month that is currently shown in the monthly view.
Forward Icon	Button	Click this button to view the next month in the same monthly view format.
Day of the Week	Text Field	This read-only text field displays the days of the week on the top of the monthly grid. This is shown on the top of the monthly grid.
Today	Button	Click this button to view the current month in the monthly view format.
Description	Text Field	This read-only text field displays a description of the public calendar.
Owner	Text Field	This read-only text field displays the owner information for the public calendar.

Group Calendars

A group calendar is a view of tasks related to a resource group with a usage of Calendar. Unlike the public calendar, which can only be viewed on the separate public calendar view, the group subscription calendar is viewed within the user's personal calendar. You can, for example, view the holiday calendar of your native country by subscribing to that group calendar and view it in your personal calendar view. Group subscriptions require administrative approval.

Calendar Views

The following are views available in Calendar:

- Daily View
- Weekly View
- Monthly View

- Yearly View
- Combination View
- Availability View
- Public Calendar

Daily View

Upon opening Calendar, you are directed toward the daily view. You can then view the entire day's schedule of appointments. Within the daily view, you can create a new appointment, update or delete an existing appointment or choose to access a different day on the calendar. The following table describes field types in the daily view of Calendar.

Daily View Window Descriptions

Field Label	Field Type	Description
Backward Icon	Button	Click this button to view the previous day in the same daily view format.
Current Day	Text Field	This read-only text field displays the view of the day that is currently shown in the daily view.
Forward Icon	Button	Click this button to view the next day in the same daily view format.
Time	Hyperlink	Click the time to access the Create Appointment window with the start time for the appointment defaulted to the time selected on the daily view. In grid format, the times are shown vertically on the left side of the window.
Date Picker	Date Picker	Select a date on the micro-monthly calendar to have that date default in the start date of the daily view.
Go To	Button	Click this button to access the Go To window where you can select a date to view in the daily view format.
Today	Button	Click this button to view the current day in any view format.

Daily View Window Descriptions

Field Label	Field Type	Description
+	Icon	Use this icon to access the Create Appointment window and select the time and day and create an appointment. The icon is shown for every time interval shown in the daily view.
Create	Button	Click this button to access the Create Appointment window. The default date for the appointment is the current date. There is no time defaulted.
Appointment Hyperlink	Hyperlink	Click this link for a particular appointment to access the detail view for that appointment.
Untimed Event	Hyperlink	Click this link for the task, appointment, or event to access the details for that specific object.

Weekly View

Within the weekly view you can create a new appointment, update an existing appointment, or delete an existing appointment. You can choose to access a different week to view that week's calendar of appointments. The following table describes field types in the weekly view of Calendar.

Weekly View Window Descriptions

Field Label	Field Type	Description
Backward Icon	Button	Click this button to view the previous week in the same weekly view format.
Current Week	Text Field	This read-only text field displays the view of the week that is currently shown in the weekly view.
Forward Icon	Button	Click this button to view the next week in the same weekly view format.

Weekly View Window Descriptions

Field Label	Field Type	Description
Time	Hyperlink	Click the time to access the Create Appointment window with the start time for the appointment defaulted to the time selected on the weekly view. In grid format, the times are shown vertically on the left side of the window.
Go To	Button	Click this button to access the Go To window where you can select a date to view in any view format.
Today	Button	Click this button to view the current day in the weekly view format.
Date	Text Field	This read-only text field displays the dates horizontally on the upper portion of the weekly view.
+	Icon	Use this icon to access the Create Appointment window and select the time and day and create an appointment. The icon is shown for every day in the week and for every time interval shown in the weekly view.
Create	Button	Click this button to access the Create Appointment window. The default date for the appointment is the current date.
Appointment	Hyperlink	Click this link for a particular appointment to access the detail view for that appointment.
Untimed Event	Hyperlink	Click this link to view at the top of the calendar to view the untimed appointment details.

Monthly View

Within the monthly view you can create a new appointment, update an existing appointment, or delete an existing appointment. You can also choose to access a different month to view that month's calendar of appointments. The following table describes field types in the monthly view of Calendar.

Monthly View Window Descriptions

Field Label	Field Type	Description
Backward Icon	Button	Click this button to view the previous month in the same monthly view format.
Current Month	Text Field	This read-only text field displays the view of the month that is currently shown in the monthly view.
Forward Icon	Button	Click this button to view the next month in the same monthly view format.
Day of the Week	Text Field	The days of the week (as defined in the user preferences) are shown on the top of the monthly grid.
Go To	Button	Click this button to access the Go To window where you can select a date to view in any view format.
Today	Button	Click this button to view the current day in the monthly view format.
Create	Button	Click this button to access the Create Appointment window. The default date for the appointment is the current date.
Appointment	Hyperlink	Click this link for a particular appointment to access the detail view for that appointment.
Untimed Event	Hyperlink	Click this link to view at the top of the calendar to view the untimed appointment details.

Yearly View

The yearly view displays all of the months for the entire year. Each month displays the days of the week starting with Sunday and ending with Saturday. The current day is highlighted within the yearly view. The following table describes field types in the yearly view of Calendar.

Yearly View Window Descriptions

Field Label	Field Type	Description
Backward Icon	Button	Click this button to view the previous year in the same yearly view format.
Current Year	Text Field	This read-only text field displays the view of the year that is currently shown in the yearly view.
Forward Icon	Button	Click this button to view the next year in the same yearly view format.
Month	Hyperlink	Click this link to access the monthly view for the month selected. The month of the year is shown on top of the monthly date picker.
Go To	Button	Click this button to access the Go To window where you can select a date to view in any view format.
Today	Button	Click this button to view the current day in the yearly view format.
Date	Hyperlink	Click the date link to access the daily view window.
Create	Button	Click this button to access the Create Appointment window. The default date for the appointment is the current date.

Combination View

You can maintain daily activities while avoiding schedule conflicts by seeing an overview of the days events along side a list of current tasks. In the combination view you can create and update appointments, and view your task summary.

Note: The combination view fields may vary depending on the columns you choose to display in the Task Summary window.

The following table describes field types in the combination view of Calendar.

Combination View Window Descriptions

Field Label	Field Type	Description
Backward Icon	Button	Click this button to view the previous day in the same combination view format.
Current Day	Text Field	This read-only text field displays the view of the day that is currently shown in the combination view.
Forward Icon	Button	Click this button to view the next day in the same combination view format.
Time	Text Field	This read-only text field displays the times shown on the left side of the window. In grid format, the times are shown vertically on the left side of the window.
Go To	Button	Click this button to access the Go To window where you can select a date to view in any view format.
Today	Button	Click this button to view the current day in the combination view format.
Create	Button	Click this button to access the Create Appointment window. The default date for the appointment is the current date.
Add	Button	Click this button to access the Create Appointment window in task view.
+	Icon	Use this icon to access the Create Appointment window and select the time and day and create an appointment. The icon is shown for every day in the week and for every time interval shown in the weekly view.
Category	Drop-down	Use the drop-down list to filter the list of tasks by the category.
Status	Drop-down	Use the drop-down to filter the list of tasks by the available statuses. This enforces the state transition business rules already in place.

Combination View Window Descriptions

Field Label	Field Type	Description
Go	Button	Click this button to execute the refresh of the window based upon the category selection.
Remove	Check Box	Select the check box of the tasks to be deleted.
Task Name	Hyperlink	Click the Task name link to access the Task Detail window and edit the task.
Priority	Text Field	This displays the priority next to every task in task view.
Note	Icon	Click the icon to access the Notes section of the Task Detail window to see if there are any notes attached to the task. If no icon appears, there are no notes attached to the task.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Save	Button	Click this button to remove all of the tasks with the remove check box selected.
Untimed Event	Hyperlink	Click this link to view at the top of the calendar to view the untimed appointment details.
Due Date	Text Field	This read-only text field displays the due date for the task.

Availability View

Within the availability view you can check the availability of a resource. Resource availability is based on appointments assigned directly to the resources which displays on the resource’s calendar. The following table describes field types in the availability view of the Calendar.

Availability View Window Descriptions

Field Label	Field Type	Description
Backward Icon	Button	Click this button to view the previous day in the same combination view format.
Current Day	Text Field	This read-only text field displays the view of the day that is currently shown in the combination view.
Forward Icon	Button	Click this button to view the next day in the same combination view format.
Today	Button	Click this button to view the current day in the combination view format.
Go To	Button	Click this button to access the Go To window where you can select a date to view in any view format.
Create Appointment	Button	Click this button to access the Create Appointment window. The default date for the appointment is the current date.
Add Resource	Button	Click this button to access the select users window.
Backward Icon	Button	Click this button to move backward to the previous time increment in the same available view format.
Time	Text Field	This read-only text field displays the times shown on the left side of the window. In grid format, the times are shown vertically on the left side of the window.
Forward Icon	Button	Click this button to move forward to the previous time increment in the same available view format.
Available	Text Grid View	This field displays the time that is available for each user. The available time is shown in the blue color format.

Availability View Window Descriptions

Field Label	Field Type	Description
Unavailable	Text Grid View	This field displays the time that is unavailable for each user. The available time is shown in the red color format.
Time	Hyperlink	Click this link to access the create appointment window where you can create an appointment for the selected date/time from the availability view.
Username	Text Field	This read-only text field displays the usernames which appear in the text grid.

Who Uses Calendar?

Calendar assigns roles to individual users. These roles determine what privileges a user has. For example, an owner of a calendar has the ability to modify their personal calendar but a subscriber of a group calendar can only have read-only privileges. The following table defines each Calendar role.

Calendar Roles

Role	Description
Administrator	The calendar administrator is responsible for creating Group or Public calendars based on the users request. Creation of Calendars is done by responding to a workflow request. Once the calendar is approved, the creator becomes the administrator for that Calendar Group.
Attendee	An attendee is a resource who has positively responded to an invitation.
Invitee	An Invitee is an individual who you send an invitation to an appointment.
Owner	A Calendar Owner is defined as the person who owns the Calendar.
Subscriber	A subscriber is an individual who requests access to a group calendar. A subscriber of a group calendar can only have read-only access.

Calendar Roles

Role	Description
User	A Calendar user is anyone who uses Calendar. The resource is determined through the Resource Manager, and assumes that every Individual Resource maps to one user.

Personalization and Preferences

You can specify personal preferences for viewing your daily calendar. You can change your password, grant access privileges so others can view your calendar, request a group or public calendar, or switch to another calendar. From the viewing perspective, you have the ability to define how your calendar looks. For example, you can define what constitutes a week (Monday to Friday or, perhaps including weekends) as well as, what hours to start and end the day within the daily and weekly views. When Calendar is integrated with other Oracle products, Calendar preferences are embedded within that applications profile or preferences. You can access the following windows from the Profile link to modify your preferences.:

- Group Calendar windows
  - Group Calendar Summary
  - Group Calendar Description
  - Request New Group
- Switch to Another Calendar
- Calendar Personal Preferences
- Privileges
- Categories
- User Time Zone

Group Calendar Summary

The following table describes field types in the Group Calendar Summary window of Calendar.

Group Calendar Summary Window Descriptions

Field Label	Field Type	Description
Request New Group	Button	Click this button to request a new group calendar.
Subscribe To Group	Button	Click this button to access the Subscribe Group window, to search for a group and subscribe to it.
Group Name	Text Field	This read-only text field displays the group name.
Group Description	Text Field	This read-only text field displays the description of the group.
Color	Text Field	This read-only text field displays color for the subscribed calendar group.
Prefix	Text Field	This read-only text field displays the prefix for the group calendar items.
Next	Button	Click this button to view the next page of the report results.
Previous	Button	Click this button to view the previous page of the report results.

Group Calendar Description

The following table describes field types in the Group Calendar Subscription window of Calendar.

Group Calendar Subscription Window Descriptions

Field Label	Field Type	Description
Subscribe	Button	Click this button to subscribe to a group.
Unsubscribe	Button	Click this button to unsubscribe to a group.
Group Name	Text Field	This read-only text field displays the group name.
Group Description	Text Field	This read-only text field displays the description of the group.

Group Calendar Subscription Window Descriptions

Field Label	Field Type	Description
Display Color	Drop-down	Use the drop-down list to select what color you want your calendar to display.
Prefix Event Title	Text Field	Enter the prefix for the group calendar items.

Request New Group

The following table describes field types in the Request New Group window of Calendar.

Request New Group Window Descriptions

Field label	Field Type	Description
Public	Check Box	Select the check box to indicate if the new group is a public calendar.
Send Request	Button	Click this button to submit a new group calendar request.
Group Name	Text Field	Enter a name for the group.
Group Description	Text Field	Enter a description for the group.

Switch to Another Calendar

The following table describes field types in the Switch to Another Calendar window of Calendar.

Switch to Another Calendar Window Descriptions

Field label	Field Type	Description
Switch Calendar	Button	Click this button to switch to another calendar. The user is taken to the daily view or the default view for the new calendar.
Calendar	Drop-down	Use the drop-down list to switch your calendar in your daily view. The list of values contain only those calendars that the user owns. The default calendar is the user’s personal calendar.

Calendar Personal Preferences

The following table describes field types in the Calendar Personal Preferences window of Calendar.

Calendar Personal Preferences Window Descriptions

Field Label	Field Type	Description
Update	Button	Click this button to update your changes.
Send Notifications	Drop-down	Use the drop-down list if you want to issue email invitations.
Clock/(12/24 Hour)	Drop-down	Use the drop-down list to define the clock format. Options include: 12 hour or 24 hour (military time) clock.
Week Begins On	Drop-down	Use the drop-down list to define the particular day for the week to begin.
Week Ends On	Drop-down	Use the drop-down list to define the particular day for the week to end.
Appointment Increment	Drop-down	Use the drop-down list to select how you want your calendar to display appointments in particular increments.
Start Hour	Drop-down	Use the drop-down list to select the start hour for the day.
End Hour	Drop-down	Use the drop-down list to select the the end hour for the day.
Weekday	Drop-down	Use the drop-down list to define the day for the work hours.

Privileges

The following table describes field types in the Privileges window of Calendar.

Privileges Window Descriptions

Field Label	Field Type	Description
Update	Button	Click this button to update the appointment to include the newly attached attendees.

Privileges Window Descriptions

Field Label	Field Type	Description
Restore	Button	Click this button to refresh the window and revert back to the original values.
View Only Access	Text Field	Enter the user ID for the person who is to have view only access.
Go	Button	Click this button to look up users in the Lookup window.
Add	Button	Click this button to add a user to the list.
Remove	Button	Click this button to remove a user from the list.
List Box	List Box	This list box displays users that currently have view only ability.
Full Access	Text Field	Enter the user ID for the person who is to have Full Access.
Go	Button	Click this button to access the Lookup window to search for users.
Add	Button	Click this button to add a user to the list in the Full Access field list box.
Remove	Button	Click this button to remove a user from the Full Access list field list box.
List Box	List Box	The list box displays all users that currently have full access ability. You can select any user to remove them from the list.

Categories

The following table describes field types in the Categories window of Calendar.

Categories Window Description

Field Label	Field Type	Description
Update	Button	Click this button to update the appointment to include the newly attached attendees.

Categories Window Description

Field Label	**Field Type**	**Description**
Restore	Button	Click this button to refresh the window and revert back to the original values.
Remove	Check Box	Select this check box to mark categories for deletion.
Category	Text Field	Enter a category to be added to the list.

User Time Zone

The following table describes field types in the User Time Zone window of Calendar.

User Time zone Window Description

Field Label	**Field Type**	**Description**
Update	Button	Click this button to update the time zone information.
Time Zone	Drop-down	Use the drop-down to select the default time zone.

Managing Appointments

Use the Create Appointment window to create an appointment for a specified time and date in one window. You can access the following windows to manage your appointments:

- Appointment Detail
- Create Appointment
- Attendees
- Reference
- Repeating
- Attachments
- Add Attachment
- Notes Summary

Appointment Detail

The following table describes field types in the Appointment Details window of Calendar.

Appointment Detail Window Description

Field Label	Field Type	Description
Source	Text Field	This field displays the source of the appointment.
Appointment Name	Text Field	This field displays the appointment name.
Name	Text Field	Enter a name for the appointment.
Start Date	Text Field	Enter the start date for the appointment.
Time Zone	Drop-down	Use the drop-down list to select the time zone for the meeting. This defaults to the user's preferences.
Start Time	Drop-down	Use the drop-down list to select the start hour time for the appointment. If you select a time from the daily view, then that time is automatically entered in the start time upon the user opening the Create Appointment window.
Duration	Drop-down	Use the drop-down list to select the duration for the appointment.
Type	Drop-down	Use the drop-down to select the task type for the appointment. Task types are defined during the set up.
Private	Check Box	Select the check box to create a private appointment for yourself that no other individual can view.
Category	Drop-down	Use the drop-down list to select a predefined category for the appointment. You can also create their own categories which appears in the drop-down.

Appointment Detail Window Description

Field Label	Field Type	Description
Priority	Drop-down	Use the drop-down list to select a priority for the appointment. Options include: High, Medium, Low, and None.
Description	Text Field	Enter a description for the appointment.
Update	Button	Click this button to update the reference table. Any items that have been selected to be removed should disappear.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Delete	Button	Click this button to delete the appointment information.

Create Appointment

The following table describes field types in the Create Appointment window of Calendar.

Create Appointment Window Description

Field Label	Field Type	Description
Name	Text Field	Enter a name for the appointment.
Start Date	Text Field	Enter the date for the appointment.
Time Zone	Drop-down	Use the drop-down list to select the time zone for the meeting. This defaults to the user's preferences.
Start Time	Drop-down	Use the drop-down list to select the start time for the appointment. If the user has selected a time from the daily view, then that time populates the start time upon the user opening the window.

Create Appointment Window Description

Field Label	Field Type	Description
Duration	Drop-down	Use the drop-down list to select the duration of the appointment. This defaults to 1 hour if not start time is specified.
Type	Drop-down	Use the drop-down to select the task type for the appointment. Task types are defined during the set up.
Private	Check Box	Select the check box to create a private appointment for yourself that no other individual can view.
Remind Me	Drop-down	Use the drop-down list to select when you want to be reminded of an appointment. Options include: Do Not Remind Me, 15 Minutes Before, 30 Minutes Before, 1 Hour Before, 2 Hours Before, 1 Day Before, 2 Days Before, 3 Days Before, 1 Week Before.
Category	Drop-down	Use the drop-down list to select a predefined category for the appointment. The user can also create their own categories in the calendar preferences.
Priority	Drop-down	Use the drop-down list to select a priority for the appointment. Options include: High, Medium, Low, and None.
Description	Text Field	Enter a note for the appointment description.
Reference Type	Drop-down	Use the drop-down list to select an object to reference an appointment being created such as a person, organization, or opportunity.
Related Object Name	Text Field	Enter a name for the related object.
Go	Button	Click this button to access the customer Lookup window to look up a customer.
Related Object Description	Text Field	This read-only text field displays a description of the related object.

Create Appointment Window Description

Field Label	Field Type	Description
Clear	Button	Click this button to refresh the window without saving your changes.
Create	Button	Click this button to save the appointment information.
Create and Create Another	Button	Click this button to create an appointment while remaining in the Create Appointment window. The first appointment is saved, the window is cleared, and you are ready to enter another appointment.

Attendees

The following table describes field types in the Attendees window of Calendar.

Attendees Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the appointment.
Appointment Name	Hyperlink	Click this link to display the appointment details.
Attendee	Text Field	This read-only text field displays the attendee's username.
Go	Button	Click this button to access the Lookup window to find a customer. Click the name to populate the field.
Add	Button	Click this button to add the selected attendee to the multi-select box.
Remove	Button	Click this button to remove a username from the multi-select box.
Availability	Button	Click this button to check the availability of the attendee in a graphical view.

Attendees Window Description

Field Label	Field Type	Description
Invite	Button	Click this button to send the usernames in the multi-select box, an invitation. The window is refreshed and the usernames now appear in the attendees table with a status of invited, and the current date.
Attendee Multi-select Box	Multi-select Box	This field displays the intended list of invitees.
Update	Button	Click this button to update the appointment to include the newly added attendees.
Remove	Check Box	Select the check box to remove an attendee from the list when you click Update.
Username	Text Field	This read-only text field displays the invitee's username.
Resource Name	Text Field	This read-only text field displays the resource name.
Status	Text Field	This read-only text field displays the status for the selected invitee.
Updated	Text Field	This read-only text field displays the date when the attendee status was updated.
Restore	Button	Click this button to refresh the window and revert back to the original values.

Reference

The following table describes field types in the Appointment Detail Reference window of Calendar.

Reference Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the appointment.

Reference Window Description

Field Label	Field Type	Description
Appointment Name	Hyperlink	Click this link to display the appointment details.
Type	Drop-down	Use the drop-down list to select the reference object.
Name	Text Field	Enter a resource name.
Go	Button	Click the Go button to access the Lookup window to look up a customer. Upon selecting a name from the Lookup window, the user is taken back to the appointment Reference window with the selected name entered as a Reference object.
Update	Button	Click this button to update the Reference table. Any items that have been selected to be removed should disappear.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Remove	Check Box	Select the check box next to the Reference objects to remove them from the table. If an icon is displayed, click it to clear the row before you update the record.
Type	Text Field	This read-only text field displays the object type.
Name	Text Field	This read-only text field displays the name of the related object.
Description	Text Field	This read-only text field displays a text description of the related object.

Repeating

The following table describes field types in the Repeating window of Calendar.

Repeating Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the appointment.
Appointment Name	Hyperlink	Click this link to display the appointment details.
Update	Button	Click this button to update the Reference table. Any items that have been selected to be removed should disappear.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Start Date	Text Field	This read-only text field displays the start date of the appointment.
End Date	Text Field	Enter the end date for the repeating appointment. You choose either an end date or a count, but not both.
Count	Text Field	Enter the number of days you want the appointment to repeat.You choose either an end date or a count, but not both. The default count is 10.
Date Picker	Icon	Click the icon to access the micro-monthly calendar to select a start date for the repeating appointment.
None	Option Button	Select the none option button to indicate that you do not have a repeating appointment.
Daily	Option Button	Select the daily option button to specify that you want the appointment to repeat on a daily basis. Once selected, you can select the daily frequency options for the number of days and the end date.
Every Day	Text Field	Enter the number of days for the appointment to repeat.

Repeating Window Description

Field Label	Field Type	Description
Weekly	Option Button	Select the weekly option button to repeat the appointment on a weekly basis. You can select the frequency options for the weekly frequency, the days to include, and the date to end.
Every Week	Text Field	Enter the number for the frequency to repeat (every two weeks or every week). The default is 1.
Days	Multi-select Box	Select the specific days to include for weekly repeating. The default is the current day it the check box cannot be deselect. However, you can select additional days.
Monthly	Option Button	Select the monthly option button to repeat the appointment on a monthly basis. You can select the frequency options for the monthly frequency, the days to include, and the date to end. The default is 1.
Every Month	Text Field	Enter the frequency to repeat of monthly repeating. For example, once a month.
On	Text Field	Enter the date for the repeating monthly appointment. The default is none.
On The	Multi-select Box	Select the specific days to include for monthly repeating.

Attachments

The following table describes field types in the Attachment’s window of Calendar.

Attachment Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the appointment.
Appointment Name	Hyperlink	Click this link to display the appointment details.

Attachment Window Description

Field Label	Field Type	Description
Update	Button	Click this button to update the appointment to include the newly attached attendees.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Add Attachment	Button	Click this button to access the Add Attachment window to create or add an attachment to an appointment.
Remove	Check box	Select this check box to remove a username from the multi-select box. If an icon is displayed, click it to clear the row before you update the record.
Date Added	Text Field	This field displays the date that the attachment was created.
Description	Text Field	Click this link to access the Note Details window and view the first 20 characters of the attachment and drill down to the attachment details.
File Size	Text Field	This read-only text field displays the file size of the attachment.
Data Type	Text Field	This read-only text field displays the data type for the attachment. Options include: Add Existing File, Text, File or URL.
Added By	Text Field	This field displays the user's name and resource ID of the creator of the attachment.
Attachment	Hyperlink	Click this link to view the attachment whether it is (a file, a URL, or text).

Add Attachments

The following table describes field types in the Add Attachment window of Calendar.

Add Attachment Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the appointment.
Appointment Name	Hyperlink	Click this link to display the appointment details.
Create	Button	Click this button to create a new attachment to the note.
Clear	Button	Click this button to refresh the window without saving your changes.
Description	Text Field	Enter a text message to be attached.
Text	Option Button	Select the text option button to indicate that the attachment is in a free-formed text format.
File	Option Button	Select the file option button to indicate that the attachment is a file.
File Name	Text Field	Enter the file location.
Browse	Button	Click this button to navigate to the file location.
URL	Option Button	Select this URL option button to enter a text file attachment.
URL Name	Text Field	Enter the URL address.

Appointment Details

The following table describes field types in the Appointment Detail Notes window of Calendar.

Appointment Detail Notes Window Description

Field Label	Field Type	Description
Source	Hyperlink	Click this link to display the source of the appointment.
Appointment Name	Hyperlink	Click this link to display the appointment details.

Appointment Detail Notes Window Description

Field Label	Field Type	Description
Search	Button	Click this button to access the Notes Search window.
Add	Button	Click this button to access the Create Note window to create a note. The note is automatically related to this appointment.
All Notes	Button	Click this button to view all notes. a new browser session opens displaying all notes related to the calling application.
Date	Read-only	This field displays the date the note was created.
Created By	Read-only	This field displays the name of the user who created the note. The Value is captured from the resource ID.
Type	Read-only	This field displays the note type.
Status	Read-only	This field displays the note status.
Note	Hyperlink	Click this link to access the Note Detail window.
Text	Icon	This icon indicates that there’s a large note associated with this note. Click the icon to display the pop-up window and view the note.
Attachment	Icon	This icon indicates that a note has one or more attachments associated with it. Click the icon to access the attachment summary window.

Integration with Notes and Tasks

A note provides a record of descriptive information that is generated and referenced by the user. Use Notes to add additional information to an appointment. The key fuctionality of Notes include:

- Viewing all existing notes
- Creating a note

- Attaching a document, text, or a URL to a note
- Searching for a note

The Task Manager provides the capability for tasks to be created, assigned, prioritized, and managed. It provides an effective mechanism for organizations to use to respond to customers' needs in a timely manner. The key fuctionality of Tasks include:

- Viewing Task Information
- Searching for a Task
- Creating a Task
- Assigning individual resources to a task
- Maintaining Task Contacts

Appointments and tasks are both tasks. Appointments that are created in the Create Appointment window automatically show up on the user's calendar with a source of appointment.

Calendar Process Flow

The following table describes the order and process of implementing and using the Calendar. The implementation for Calendar is done in the Forms version.

Calendar Process Flow

Steps	Description	Required	Performed By
Setting up Calendar	Add a Calendar Tab to your web page.	Yes	Implementor
Setting System Profile Options	Use Calendar Forms to set your profile options.	Yes	Implementor
Creating a Calendar System Administrator	Use Calendar Forms to set your calendar System Administrator	Yes	Implementor
Creating a Calendar User	Use the Resource Manager to create a resource type employee.	Yes	Calendar Administrator
Defining a Role for a Calendar User	Use the HTML calendar to define the calendar users role.	Yes	Calendar Administrator
Viewing your Personal Calendar	Use Calendar to effectively manage your daily activities, appointments, and tasks.	Yes	All Users

Calendar Process Flow

Steps	Description	Required	Performed By
Viewing a Public Calendar	Use the Public Calendar window to view or create a public calendar.	Optional	All Users
Viewing a Group Calendar	Use the Group Calendar window to subscribe, view, and create a group calendar.	Optional	All Users
Viewing Resource Availability	Use the Availability window to view the accessibility of employee type resources.	Optional	All Users
Creating Appointments	Use the Create Appointment window to create an appointment.	Optional	All Users
Defining Attendees for an Appointment	Use the Attendees window to invite employee type resources to an appointment.	Optional	All Users
Adding Attachments to an Appointment	Use the attachments window to view all attachments, and create and add attachments to an appointment.	Optional	All Users
Creating Repeating Appointments	Use the Repeating window to create a recurring appointment.	Optional	All Users
Creating Contacts	Use the Contacts window to create and manage your contact information.	Optional	All Users
Importing Contacts	Use the Corporate directory window to import contacts into your personal directory.	Optional	All Users
Exporting Contacts	Use the CSV icon to export your personal directory to Microsoft Excel or HTML format.	Optional	All Users
Processing Calendar Requests	Use the workflow notification window to grant or deny a group or public calendar request.	Yes	Calendar Administrator
Using Tasks	Use the Task Manager to Create, edit, and view tasks.	Optional	All Users
Using Notes	Use Notes to view, create, and attach notes to an appointment.	Optional	All Users
Customizing Calendar Preferences	Use Calendar preferences to modify the way you view your calendar.	Optional	All Users

Understanding Calendar (Forms)

This topic group provides overviews of the Calendar application and its components, as well as explanations of key concepts, features, and functions. This section covers the following topics:

- Calendar Overview
- Calendar Set Up
- Calendar Datebook

Calendar Overview

Calendar is a scheduling tool used to define and view available and non-available time for a resource or group of resources. You can create a calendar for yourself or another resource, associate work shifts with calendars, and assign a resource to a shift depending on availability. There are two types of calendar windows: Calendar Set up and Calendar Datebook.

Calendar Set Up

Use Calendar set up to create time periods in a calendar datebook for yourself or a resource. Calendar set up uses shifts and patterns to define time availability and accommodate the most complex situation for a resource. You can set up everything you need to create pertinent information in your datebook.

Calendar Datebook

Use the Calendar Datebook to view time availability for yourself, a resource, or a group of resources. You can also create a private Todo List or access the Tasks window to edit a task for a resource. If you want to change availability times or a work shift, you must use the Calendar set up windows.

Calendar Set Up

Use Calendar set up to create time periods in a calendar datebook for yourself or a resource. Calendar set up uses shifts and patterns to define time availability and accommodate the most complex situation for a resource. You can set up everything you need to create pertinent information in your datebook.

What is Available Time?

Available time is defined using shifts and patterns.

What is a Shift?

A shift defines when a person is available to work. Using the simplest example, a shift can be created that defines the default working week Monday to Friday 8:30 to 17:00.

What is a Shift Pattern?

A set of shifts can be set into a pattern.

For example:

> Shift A, named Field Support, starts at 8:00 and lasts 9 hours.
>
> Shift B, named Stand By, starts at 20:00 and lasts 12 hours.
>
> On days 1 to 4, the resource can be assigned shift A, and then days 6 and 7 shift B, and day 5 can be free.

What Is Non-available TIme?

Non-available time is a defined block of time when a resource is not available to accept a task.

Non available time can be a number of entries:

- A personal entry
- An entry or task sent by another resource
- A group appointment or entry created by the resource or another resource
- Public holidays
- Meetings
- Personal vacation
- Illness

- Personal or work appointment

Calendar Datebook

In your Datebook you can view:

- Working hours
- Assigned tasks
- Personal appointments
- Official holidays and vacation days

In addition, you can:

- Create a ToDo list for the day, week, or month
- Access the Tasks application to edit a task

Using Calendar (HTML)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser.

Ensure that you are viewing the correct information for your software.

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

- Getting Started
- Logging into Calendar
- Using the Quick Find Search
- Viewing Your Calendar
  - Viewing Your Personal Calendar
  - Viewing Different Dates on Calendar
  - Viewing Your Tasks and Calendar Simultaneously
  - Viewing the Availability of a Resource
  - Adding a New Resource to Your Availability View
  - Viewing a Public Calendar

- Managing Appointments
  - Viewing Appointment Details
  - Creating an Appointment
  - Deleting an Appointment
  - Defining Attendees for an Appointment
  - Receiving an Invitation
  - Creating Repeating Appointment
  - Viewing Existing Attachments
  - Adding an Attachment
  - Relating Appointments and Tasks to Source Objects
- Working with Tasks
- Working with Notes
- Customizing Your Calendar Preferences
  - Changing Your Personal Preferences
  - Defining Privileges for Your Calendar
  - Working with Group Calendars
  - Subscribing to a Group Calendar
  - Requesting a New Group Calendar
  - Switching to Another Calendar
  - Adding and Removing Task Categories
  - Defining Your Time Zone

Getting Started

Note: If you have integrated both Calendar and Resource Manager with another Oracle product, you see both the Calendar tab and the People tab. These two modules share the following joint responsibility: CRM Application Foundation User.

Typically, the following procedures are performed in Calendar:

- Viewing your personal calendar
- Checking the availability of another user
- Creating and viewing public calendars
- Creating and viewing group calendars
- Creating and maintaining appointments
- Maintaining contact information
- Defining preferences

Note: All fields marked with an asterisk are required.

Logging into Calendar

The following modules use Calendar to schedule resources:

- Oracle Field Service (Forms)
- Oracle Marketing Online (HTML)
- Oracle Sales Online (HTML)
- Oracle Service (HTML)
- Oracle Telesales (Forms)
- Oracle Projects (Forms)

Each module should have an individual login and display a Calendar tab upon access. Perform the following steps to log into Calendar.

Prerequisites

You must be an employee type resource to use calendar.

Note: Clicking the Calendar tab always returns you to the daily view of your calendar.

Note: If you have integrated both Calendar and Resource Manager with another Oracle product, you see both the Calendar tab and the People tab. These two modules share the following joint responsibility: CRM Application Foundation User.

Steps

1. Navigate to one of the listed modules.
2. Enter your user ID.
3. Enter your password and click **Go**.
4. Click the Calendar tab.

   Your personal calendar opens to the current dates daily view.

Using the Quick Find Search

Use the quick find search to find your appointments, tasks, and notes. Perform the following steps to invoke a search.

Prerequisites

None

Steps

1. Using the Quick Find drop-down list, select search criteria:
   - Appointment
   - Task
   - Notes
2. Enter a keyword or character for the search (at least three characters). To search for all groups, enter "%%%" and click **Go**.

   The Search Results window opens.
3. Click any item to display the details.

Viewing Your Personal Calendar

Once you log into calendar, your personal calendar displays the daily view of the current date.

Note: If you have integrated both Calendar and Resource Manager with another Oracle product, you see both the Calendar tab and the People tab. These two modules share the following joint responsibility: CRM Application Foundation User.

Note: Click any forward or backward arrow on any view page to view the previous or next day, week, month, or year.

Prerequisites

None

Steps

1. Click any of the following menu items to display your calendar in the corresponding view:
   - Daily
   - Weekly
   - Monthly
   - Yearly
   - Combination
2. Click any appointment to view it's details.
3. Click **Today** to view the current date for any calendar view.

See Also

- Viewing Different Dates on Calendar
- Viewing the Availability of a Resource
- Viewing a Public Calendar

Viewing Different Dates on the Calendar

Use Calendar to view different dates on the calendar. Use the following procedure to change the current date in your personal calendar.

Prerequisites

None

Steps

1. Click **Go To** in any calendar view or click the Date on the calendar to the right of the window to display the dates daily view.

   If you click **Go To**, the Go to Date window opens.

2. From the drop-down list, select the Day you want to view.
3. From the drop-down list, select the Month you want to view.
4. From the drop-down list, select the Year you want to view.
5. Select the option button of the view you want to display:
   - Daily
   - Daily Combination
   - Monthly
   - Weekly
6. Click **Go** to view the date you selected.

See Also

- Viewing Your Personal Calendar
- Viewing the Availability of a Resource
- Viewing a Public Calendar

Viewing Your Tasks and Your Calendar Simultaneously

Use the combination view to create, update, or delete an existing appointment, just as in the daily view. In addition to the daily view that is shown on the left side of the window, you can view the list of your owned and assigned tasks in the Task Summary. Appointments will only be shown in the left side of the window, and not in the Task Summary. Perform the following steps to access your Combination view.

Note: If you are viewing another resources personal or group calendar you will not be able to view it in the Combination view.

Note: The number of rows displayed in the Task Summary of the Combination View of the Calendar can be modified by selecting the **Preferences** link in the side navigation bar when you select the **Profile** link in the top right corner of the window.

Prerequisites

You must have a task to view.

Steps

1. From the daily view of your calendar, click **Combination** on the side navigation bar.

   The Combination window opens displaying your calendar on the left and a list of your tasks on the right.

2. Click any appointment to display the appointment details window.
3. Click **Go To** to change the date on the calendar or use the arrow icons to move back and forth.

See Also

Viewing the Task Summary

Viewing the Availability of a Resource

Use the availability view to display a list of resources along with their schedule for the selected day. Perform the following steps to view the availability window.

Prerequisites

The resource must be defined in the Resource Manager.

Steps

1. From the daily view of your calendar, click **Availability** on the side navigation bar.

The Availability window opens with the available times in blue and the unavailable times in red.

2. Use the forward and backward arrows to change the current date.
3. Click **Create Appointment** to create an appointment or click the time interval in the combined graphical view.
4. Click **Add Resource** to view another individuals availability.

See Also

- Viewing Your Personal Calendar
- Viewing Different Dates on Calendar
- Viewing a Public Calendar
- Adding a New Resource to Your Availability View

Adding a New Resource to Your Availability View

Use Calendar to add additional usernames to your availability view. Once you add an additional resource to the window, their availability information appears below your information. Perform the following steps to add a new resource to your availability view.

Prerequisites

A resource must already be created and accessible.

Steps

1. In the Availability window, click **Add Resource**.

   The Lookup window opens.

2. Click **Go** to search for a resource.

   The search window opens.

   a. Enter at least one character in the search field or enter "%" to search all public calendars and click **Search**.

      A list of resources appear in the window.

   b. Click the resource name you want to add.

      The resource name populates the text field.

3. Click **Add**.

   The Resource is added to the multi-line text field.

4. Click **Apply** to add the resource or click **Remove** to delete the resource from the multi-line text field.

   The Availability window opens with the new resource's availability displayed in the window.

See Also

- Viewing Different Dates on Calendar
- Viewing the Availability of a Resource
- Viewing a Public Calendar

Viewing a Public Calendar

A calendar user can view all existing public calendars. Public Calendars are displayed in Monthly view only. Perform the following steps to access a Public calendar.

Prerequisites

None

Steps

1. In the View menu, click **Public Calendar** in the side navigation bar.

   The Public Calendar window opens (recheck).

2. Enter the name of the public calendar or click **Go** to search for the public calendars.

   a. Enter at least one character in the search field or enter "%" to search all resources and click **Search**.

      A list of calendars appear in the window.

   b. Click the Calendar you want to view.

      The name populates the text field.

3. Use the drop-down list to select the month you want to view.
4. Use the drop-down list to select the date you want to view.

5. Click **View**.

   The calendar appears in the window.

6. Click **Today** to return to the current month of the public calendar you are viewing.

See Also

- Viewing Your Personal Calendar
- Viewing Different Dates on Calendar
- Viewing the Availability of a Resource

Viewing Appointment Details

Use the Appointment Details window to view details for any of your existing appointments. The appointments menu can be access in the side navigation bar once you create an appointment. Perform the following steps to view the details on an appointment.

> **Note:** Click the source number link to view the source or the name link to view the details of the record.

Prerequisites

None

Steps

1. From the daily view of your calendar, click an appointment link.

   The Appointment Detail window opens.

2. Edit the information in the window and click **Update** to modify the appointment or click **Restore** to reset the original values in the window.

   A confirmation window opens to confirm the information was updated.

Guidelines

The following table describes links, which appear in the side navigation bar once you click **Create** in the Create Appointment window.

Appointment Details Side Navigation Bar

Link	Description
Appointment (Main)	Click this link to access the Create Appointment window where you can create an appointment.
Attendees	Click this link to access the Attendees window and define attendees for an appointment.
Reference	Click this link to access the Reference window and relate an appointment to a business object such as a marketing campaign.
Repeating	Click this link to access the Repeating window and create a recurring appointment.
Attachments	Click this link to access the Attachments window to view, create, and add attachments to an appointment.
Notes	Click this link to access Notes and view and add notes to an appointment.

See Also

- Creating an Appointment
- Creating Repeating Appointment
- Adding an Attachment to an Appointment
- Defining Attendees for an Appointment
- Relating Appointments and Tasks to Source Objects

Creating an Appointment

Use the calendar to create an appointment for yourself or another employee type resource. Perform the following steps to create an appointment.

Prerequisites

None

Steps

1. In the daily view of your calendar, click **Create** or click Appointments in the side navigation bar.

   The Create Appointment window opens.

2. Click **Create**.

   The Create Appointment window opens.

3. Enter a name for the appointment.

4. The start date reflects the current date.

5. Using the drop-down list, select the time zone where the appointment is scheduled, which defaults to the profile client time zone.

6. Using the drop-down lists, define the following information for the appointment:

   - Start Time
   - Duration
   - (Task) Type
   - (Task) Category
   - Priority (Status)

7. Use the drop-down list to select when you want to be reminded of an appointment. Options include: Do Not Remind Me, 15 Minutes Before, 30 Minutes Before, 1 Hour Before, 2 Hours Before, 1 Day Before, 2 Days Before, 3 Days Before, 1 Week Before.

8. Select the **Private** check box if this a private appointment.

9. Use the drop-down list to select when you want to be reminded of the appointment.

10. Enter a description for the appointment.

11. To select Reference information, perform the following steps:

    a. Using the drop-down list, select the related object.

    b. Enter the resource name or click **Go**.

    c. Enter at least one character in the search field or enter "%" to search all resources. and click **Search**.

       A list of resources appear in the window.

    d. Click the resource name you want to add.

       The resource name populates the text field.

12. Click either **Create** or **Create and Create Another** to return to the Create Appointment window to create another appointment.

    A confirmation window opens to confirm the appointment was created.

See Also

- Viewing Appointment Details
- Creating Repeating Appointment
- Adding an Attachment to an Appointment
- Defining Attendees for an Appointment
- Relating Appointments and Tasks to Source Objects
- Creating a Note

Deleting an Appointment

You can delete any of your existing appointments. Perform the following steps to delete an appointment.

Prerequisites

An appointment must already exist.

Steps

1. From the daily view of your calendar, click an appointment.

   The Appointment Detail window opens.

2. Click **Delete** to remove the appointment from your calendar.

   If you are trying to delete a repeating appointment, the Delete Appointment window opens displaying three options:

   - Only this Appointment
   - All Appointments
   - All Appointments from this Day

3. Select the option you want and click **Delete**.

   A confirmation window opens to confirm the appointment was deleted.

See Also

Creating an Appointment

Defining Attendees for an Appointment

With the invitation functionality you can invite individuals to specific appointments. Perform the following steps to invite an employee type resource to an appointment.

Note: Click the source number link to view the source or the name link to view the details of the record.

WARNING: Do not modify the assignee status of the invitee in the form-based version of Task Manager. Not all Task Manager assignee statuses are available in the HTML Calendar.

Prerequisites

An appointment must already exist.

Steps

1. In the Appointment Detail window, click **Attendees** in the side navigation bar.

   The Attendees window opens.

2. Enter the resource name of the employee you want to invite to the appointment or click **Go** to access the lookup tool.

   a. Enter at least one character in the search field or enter "%" to search all resources and click **Search**.

      A list of usernames appear in the window.

   b. Click the resource you want to attend the appointment.

      The name populates the text field.

3. Click **Add**.

   The employees resource name is moved to the multi-select text box field below the Attendee field. You can continue to add resources to this box and click **Availability** to view all resource's availability in the Availability window.

4. Select the employees name and click **Remove** to delete the name from the multi-select text box.

5. Select the employees name and click **Availability** to view the employee's availability for the scheduled appointment time.

6. Click **Invite**.

   The employee is added to the invitees list with information regarding their status (invited, accepted, or rejected) as well as information regarding when the status was changed.

7. Select the **Remove** check box next to the employees name to delete them from the list.

See Also

- Viewing Appointment Details
- Creating an Appointment
- Creating Repeating Appointment
- Receiving an Invitation
- Adding an Attachment to an Appointment
- Relating Appointments and Tasks to Source Objects

Receiving an Invitation

When you receive an invitation to an appointment, it displays in your calendar. Invites display as attendee on the user calendar. Once they accept, the status changes from invitee to attendee. You are not able to modify the appointment unless otherwise specified in the preferences window. Perform the following steps to view and respond to an invitation.

WARNING: If you delete an invitation, you are not able to retrieve it.

Prerequisites

An invitation must exist.

Steps

1. Click the invitation link which appears in your calendar.

   The Appointment Invitation window opens with the appointment details in read-only format.

   a. Click **Accept**, to accept the invitation.

      The word Invite disappears and a response is sent to the owner of the appointment.

   b. Click **Reject**, to decline the invitation.

      The link disappears completely.

See Also

- Creating an Appointment
- Defining Attendees for an Appointment

Creating a Repeating Task or Appointment

Use the Repeating window to create a series of appointments for a regularly scheduled appointment. Perform the following steps to create a repeating appointment.

See the Task Manager for information regarding Creating a Repeating Task or Appointment

See Also

- Viewing Appointment Details
- Creating an Appointment
- Adding an Attachment to an Appointment
- Defining Attendees for an Appointment
- Relating Appointments and Tasks to Source Objects

Viewing Existing Attachments

Use Calendar, Task, or Notes to view an existing attachment before adding it to the appointment. Perform the following steps to view the attachments window.

Note: Click the source number link to view the source or the name link to view the details of the record.

Note: Use the First, Previous, Next, and Last links at the bottom of the window to view all existing attachments in the system.

Prerequisites

An attachment must exists in the system.

Steps

1. From the Create Appointment window, click Attachments.

   The Attachments window opens.

2. Click any attachment link to view it in the window.

Note: If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.

See Also

Adding an Attachment to an Appointment

Adding an Attachment

Use Calendar, Tasks, or Notes to add an existing attachment to an appointment, as well as, create and add a new attachment, all from the same window. You can link unstructured data such as images, word-processing documents, spreadsheets, URLs, or text to their application data. Perform the following steps to attach or create an attachment for a specific appointment.

Note: Click the source number link to view the source or the name link to view the details of the record.

Note: Use the First, Previous, Next, and Last links at the bottom of the window to view all existing attachments in the system.

Prerequisites

None

Steps

1. In the Appointment Detail window, click **Attachments** in the side navigation bar.

   The Attachments window opens.

2. Click **Add Attachment**.

   The Add Attachments window opens.

3. Enter a description for the attachment.
4. Select one of the following option buttons to define the type of attachment you want to add. The default is attaching a File.

Text: Enter the attachment text in the text field (no more than 2000 characters).

File: Enter the file name or click Browse to search for the file.

   a. From the Choose File window, navigate to the file you want to attach.
   b. Click **Open**.
   c. The File name appears in the text field.

URL: Enter the URL address.

5. Click **Create** to add the attachment to the Appointment, or click **Clear** to reset the original values in the window.

See Also

- Viewing Appointment Details
- Creating an Appointment
- Creating Repeating Appointment
- Defining Attendees for an Appointment
- Relating Appointments and Tasks to Source Objects

Relating Appointments and Tasks to Source Objects

Use the Reference window to relate an appointment to a business object. For example, if the appointment relates to a business Campaign, you can relate the appointment to the campaign and the task shows the Reference information whenever someone views it. Perform the following procedure to relate an appointment to another business object.

> **Note:** Click the source number link to view the source or the name link to view the details of the record.

Prerequisites

None

Steps

1. In the Appointment Details window, click **Reference** in the side navigation bar.

   The Reference window opens.

2. Using the drop-down list, select the Related Object.
3. Enter the name of the business object or enter at least two characters in the search field or enter "%%" to search all business objects or click **Go** to access the lookup tool.

   A list of business objects appear in the window.

4. Click the business object you want to reference the business object and close the window.

   The field populates with the business object.

5. Click **Update** to add the information to the table.
6. Select the **Remove** check box next to the business object and click **Update** to delete it from the list.

   The information is added to the Type and Name columns and a confirmation window opens to confirm the information was updated.

> **Note:** If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.

See Also

- Viewing Appointment Details
- Creating an Appointment
- Creating Repeating Appointment
- Adding an Attachment to an Appointment
- Defining Attendees for an Appointment

Working with Tasks

In the Calendar module, you can perform the following actions with tasks:

- Viewing Task Information
  - Viewing the Task Summary
  - Customizing your Task Summary Display Options
  - Selecting Sort Options
  - Personalizing Your Saved Searches
  - Viewing Task Details
- Managing Tasks
  - Creating a Task
  - Associating a Task with a Customer
  - Relating Appointments and Tasks to Source Objects
  - Assigning a Resource to a Task
  - Specifying the Task Effort
  - Creating a Repeating Task or Appointment
  - Mass Creating Tasks
- Managing Task Contacts
  - Viewing Task Contact Information
  - Defining Task Contacts
- Managing Attachments
  - Viewing Existing Attachments

- Adding an Attachment

Working with Notes

In the Calendar module, you can perform the following tasks using Notes:

- Viewing All Notes
- Viewing Note Details
- Searching for a Note
- Creating a Note
- Viewing Existing Attachments
- Adding an Attachment
- Creating Note Text (CLOB)
- Using the Reference Function

Changing Your Personal Preferences

Use the Calendar preferences to control the way you view your calendar. Perform the following steps to modify your personal preferences.

Note: Selecting No for email notifications overwrites sending an email to an invitee and the invitation only appears on their calendar.

Prerequisites

None

Steps

1. Click **Profile** in the top right corner of the window.

   The Calendar Personal Preferences window opens.

2. Select your personal preferences:

   - Select whether or not you want an email notification sent to the attendees when you send an invitation to an appointment.

- Select if you want your clock to display in intervals of 12 or 24 hours.

3. Select preferences for your Calendar's weekly set up:
   - Select what order you want the weeks on your calendar to begin and end. For example, Sunday through Saturday or Monday through Friday.
   - Select the way you want your appointment time increments to display. For example, 15 minute or 30 minute increments.
   - Select the start time and end time you want to display on your calendar for each day of the week.
4. Click **Update** when you are done changing your preferences.

See Also

- Subscribing to a Group Calendar
- Requesting a New Group Calendar
- Switching to Another Calendar
- Adding and Removing Task Categories
- Defining Privileges for Your Calendar
- Defining Your Time Zone

Defining Privileges for Your Calendar

Use the Calendar privileges to grant another user view only or full access to your personal calendar. Perform the following steps to set calendar privileges.

> **Note:** If you have a Private appointment, only you are able to view it. Even if you grant privileges to a user to view your calendar, the appointment remains private.

Prerequisites

None

Steps

1. Click **Profile** in the top right corner of the window.

   The Calendar Personal Preferences window opens.

2. Click **Privileges** in the side navigation bar.

   The Privileges window opens.

3. Enter the username in the text field next to the access you wish to grant (view only or full) or click **Go** to search for a user.

   The Lookup window opens

   a. Enter at least one character for the search criteria or enter "%" to search for all users.

   b. Click **Search**.

      A list of users is displayed in the window.

   c. Click the username you want to grant privileges to.

      The username populates the text field

4. Click **Add** to add the username to the multi-line text field.

5. Click **Update** or click **Restore**.

See Also

- Subscribing to a Group Calendar
- Requesting a New Group Calendar
- Switching to Another Calendar
- Changing Your Personal Preferences
- Adding and Removing Task Categories
- Defining Your Time Zone

Working with Group Calendars

See the following sections to subscribe and create a group calendar.

- Subscribing to a Group Calendar
- Requesting a New Group Calendar

Subscribing to a Group Calendar

A calendar user has the ability to subscribe to a group calendar. If your subscription request is approved by the group calendar owner, the group calendar displays in the group calendar summary window the next time you accesses it. Perform the following steps to gain access to a group calendar.

Prerequisites

You must have permission to subscribe to a group calendar.

Steps

1. Click **Profile** in the top right corner of the window.

   The Calendar Personal Preferences window opens.

2. Click **Group Calendar** in the side navigation bar.

   The Group Subscription window opens.

3. Click **Subscribe to Group**.

   The Subscribe to Group Calendar window opens.

4. Enter the name of the group calendar you want to subscribe to or click **Go** to search for a group.

   a. Enter at least one character in the search field or enter "%" to search all resources.

   b. Click **Search**.

      A list of calendars appear in the window.

   c. Click the Calendar name you want to add.

      The Group Name and Group Description fields information populates the corresponding fields.

5. Using the drop-down list, select which color you want the group to display in your calendar.

6. Enter the prefix for the group calendar items.

7. Click **Subscribe**.

   The group calendar subscription conformation window opens confirming that your subscription has been submitted.

8. Click **Back** to return to the Group Calendar Subscription window.

The workflow notification is sent to the calendar group administrator.

See Also

- Requesting a New Group Calendar
- Switching to Another Calendar
- Changing Your Personal Preferences
- Adding and Removing Task Categories
- Defining Privileges for Your Calendar
- Defining Your Time Zone

Requesting a New Group Calendar

Use the Calendar to create a group or public calendar. When you create a group or public calendar you are the owner as well as the administrator. Perform the following steps to request a creation of a new group calendar.

Prerequisites

You must be a manager to create a new group calendar.

Steps

1. Click **Profile** in the top right corner of the window.

   The Calendar Personal Preferences window opens.
2. Click **Group Calendar** in the side navigation bar.

   The Group Subscription window opens.
3. Click **Request New Group**.

   The Request New Group window opens.
4. Enter a name for the group.
5. Enter a description for the group.
6. Select the **Public** check box if you are requesting a public calendar.
7. Click **Send Request**.

   A confirmation page opens and a workflow notification is sent to the calendar administrator who determines whether or not the request gets approved.

See Also

- Subscribing to a Group Calendar
- Switching to Another Calendar
- Changing Your Personal Preferences
- Adding and Removing Task Categories
- Defining Privileges for Your Calendar
- Defining Your Time Zone

Switching to Another Calendar

Use Calendar to display different calendars that you own in your calendar view. Perform the following steps to switch to another calendar view.

Prerequisites

You must subscribe to or own another calendar.

Steps

1. Click **Profile** in the top right corner of the window.

   The Calendar Personal Preferences window opens.

2. Click **Switch Calendar** in the side navigation bar.

   The Switch to Another Calendar window opens.

3. Using the drop-down list, select to view another calendar you own or have access to.

4. Click **Switch Calendar**.

   The new calendar opens in the daily view.

See Also

- Subscribing to a Group Calendar
- Requesting a New Group Calendar
- Changing Your Personal Preferences
- Adding and Removing Task Categories
- Defining Privileges for Your Calendar

- Defining Your Time Zone

Adding and Removing Task Categories

Use Calendar to create your own personal task categories. Perform the following steps to create a new task category.

> **Note:** The default category "Unfiled" exists for all users.

Prerequisites

None

Steps

1. Click **Profile** in the top right corner of the window.

   The Calendar Personal Preferences window opens.

2. Click **Categories** in the side navigation bar.

   The Categories window opens.

3. Enter a name for the category into a blank field under the category column.
4. Select the **Remove** check box next to the category and click **Update** to delete it.
5. Click **Update** to save your changes or click **Restore** to revert back to the original information.

See Also

- Subscribing to a Group Calendar
- Requesting a New Group Calendar
- Switching to Another Calendar
- Changing Your Personal Preferences
- Defining Privileges for Your Calendar
- Defining Your Time Zone

Defining Your Time Zone

Perform the following steps to change your time zone information for calendar and all integrated Oracle Products.

Prerequisites

None

Steps

1. Click **Profile** in the top right corner of the window.

   The Calendar Personal Preferences window opens.

2. Click **Time Zone** in the side navigation bar.

   The User Time Zone window opens.

3. Using the drop-down list, select the time zone you want to specify as your default.

4. Click **Update** to save your changes.

See Also

- Subscribing to a Group Calendar
- Requesting a New Group Calendar
- Switching to Another Calendar
- Changing Your Personal Preferences
- Defining Privileges for Your Calendar
- Adding and Removing Task Categories

Using Calendar

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser.

Ensure that you are viewing the correct information for your software.

This topic group provides process-oriented, task-based procedures for using the Calendar set up windows and the Calendar Datebook. This section covers the following topics:

Defining Availability

Defining availability means defining your working hours. A shift is the time a resource is available, and a shift pattern is the shift that extends for a longer period of time. Perform the following steps to define shifts and shift patterns. For more information see Calendar Set Up.

Prerequisites

None

Steps

1. Navigate to the Define Shifts window.
2. In the Name field, create a name for your shift. You will be attaching this specific shift to your calendar later.
3. In the Description field, enter a description of the shift.
4. In the Effective Dates area, enter the Start and End Dates.
5. In the Shift Pattern area, define recurrent days off, such as Saturday and Sunday.

   The time on the days off should range from 00:00 - 00:00.
6. In the Shift Pattern area, select the day of the week from the LOV.
7. Enter the times you are available for the selected work day.
8. In the Availability Type field, select the availability type from the LOV. You can manually enter a type if the list doesn't provide you with an appropriate type.
9. In the Effective Dates area, enter the Start Date.

   The field is automatically populated with today's date.
10. In the To field, select the LOV to view a calendar.
11. Save your work. Your shift pattern is saved to the database.

Defining Non-Availability (Exceptions)

When you are setting up your calendar you must define not only your working hours, but also the times when you are not available for work, such as federal holidays, vacation, or sick days. These days are exceptions to your regular working shift. Perform the following steps to define non-availability.

Prerequisites

None

Steps

1. Navigate to the Exceptions window.
2. In the Name field, create a name for your non-available work time.
3. In the Category field, select a category from the LOV. A category is a predefined type of exception.
4. In the Description field, enter a description of your exception.
5. Click **Save**. Your exception information is saved to the database.

Defining the Calendar

In order for your shifts and times to appear in the Datebook, you must create a calendar. Once your calendar is defined, then you can link your shifts and times to it. Perform the following steps to define a calendar.

Prerequisites

None

Steps

1. Navigate to the Define Calendar window.
2. In the Name field, select the calendar name form the LOV.
3. In the Type field, select the type of calendar you want to create from the LOV.
4. In the Description field, enter a description of the calendar type.
5. In the Effective Dates fields, enter the time period for the calendar.

Using the Assign Shift and Exceptions Window

You can use the Assign Shift and Exceptions window to:

- Assign a Calendar to a Shift
- Assign a Calendar to an Exception

Assigning a Calendar to a Shift

Perform the following steps to assign shift patterns that have already been defined to a specific calendar. The shifts and patterns are then displayed in your datebook.

Prerequisites

You must first define your availability and non-availability (shift patterns).

Steps

1. Navigate to Assign Shift/Exceptions.
2. Select the Shifts tab.
3. In the Calendar Name field, enter a calendar name.
4. Enter the calendar description.
5. Enter the effective dates.
6. In the Shifts field, select your already defined shift from the LOV.

See Also

- Defining Non-availability (Exceptions)
- Defining Availability

Assigning a Calendar to an Exception

Perform the following steps to assign exceptions that have already been defined to a specific calendar. These exceptions are then displayed in your datebook.

Prerequisites

You must first define your availability and non-availability (shift patterns).

Steps

1. Navigate to Assign Shift/Exceptions.
2. Select the Exceptions tab.
3. In the Calendar Name field, select a calendar name from the LOV.
4. Enter the calendar description.
5. Enter the effective dates.

6. In the Shifts field, select your already defined shift from the LOV.

See Also

- Defining Non-availability (Exceptions)
- Defining Availability

Assigning a Resource to a Calendar

In addition to creating your own personal calendar, you can assign a resource to a calendar. Use this procedure to assign a resource to a calendar.

Prerequisites

None

Steps

1. In the Calendar Name field, select the calendar name from the LOV.
2. From the Resource Type drop-down list, enter the resource type.
3. In the Name field, enter the name of the resource.
4. Enter the Start and End Dates.
5. Click **Save**.

Guidelines

You can assign more than one calendar per resource.

Creating Tasks and ToDos in a Calendar

Perform the following steps to gain access to your personal calendar and there create and edit tasks and ToDos.

Prerequisites

You must have a personal calendar.

Steps

1. Navigate to **Control Tower**.

The Control Tower form opens with resources displayed on the Plan Board tab at the bottom of the form.

2. Right-click a resource name to open a pop-up menu.
3. Select Show Calendar to open the calendar for the selected resource name.

   The Calendar opens to display tasks and ToDos.
4. (Optional) Select Task and click **New** to create a task.

   The Tasks form opens.

   See Creating and Updating Tasks for details.
5. (Optional) Select ToDo and click **New** to create or edit a ToDo.

   The Create/Edit Todo form opens. Fill in the appropriate information and click **OK**.

   See Creating a ToDo List for details.
6. Save your changes and close the Calendar.

Viewing the Datebook

Use the Datebook window to view a work shift, task, or time off for yourself or a resource, or a group of resources. Perform the following steps to View the datebook.

Prerequisites

None

Steps

1. Navigate to the Datebook window.
2. From the Calendar Name field, select the calendar name you want to view. For example, a personal or work calendar.
3. From the drop-down list next to the Resource Employee field, select the resource or group of resources available for the chosen calendar.
4. Select either the Day, Week, or Month tab depending on the time period you want to view.

Creating a ToDo List

You can create a personal ToDo list for yourself. Perform the following steps to create a ToDo list.

Prerequisites

None

Steps

1. Navigate to the Datebook window.
2. Select the **ToDo** option button.
3. Click **New**. The Create/Edit ToDo window appears.
4. Enter the name of your ToDo. This entry appears in the ToDo region.
5. Enter a description of the ToDo. Use this text field to add more detail to your one line ToDo name.
6. In the Priority field, enter the priority.
7. In the Status field, enter the status.
8. Enter the effective dates.
9. Click **OK**.

Administering Calendar

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser. Ensure that you are viewing the correct information for your software.

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities. This section covers the following topics:

- Viewing and Approving Group Calendar Requests
- Viewing and Approving Subscription Requests

Viewing and Approving Group Calendar Requests

Note: The following procedure must be done in the Calendar Forms-based module.

The Calendar Administrator can approve or reject a group calendar request. Whether the group calendar request is granted or rejected, the group calendar requestor gets a notification. If the request is approved, the requestor is automatically subscribed to the calendar. Perform the following steps to approve a group calendar request.

Prerequisites

You must set up your Personal Home Page (PHP) and create a worklist to receive notifications.

Steps

1. Log in as the Calendar Administrator
2. Set up your PHP to show workflow notifications.
3. Navigate to **Self Service > Workflow > View Notifications**.

   Now you can decide if you want to approve or deny a group calendar request.

See Also

Viewing and Approving Subscription Requests

Viewing and Approving Subscription Requests

Note: The following procedure must be done in the Calendar Forms-based module.

If the user places a request to subscribe to an existing private group calendar through the Subscribe to Group Calendar page, the owner of the group calendar gets a notification through workflow. Perform the following steps to add a Calendar tab to the window.

Prerequisites

You must set up your Personal Home Page (PHP) and create a worklist to receive notifications.

Steps

1. Log in as the Calendar Administrator
2. Navigate to **Self Service > Workflow > View Notifications**.
3. Grant the user either Full or Read Only access to the group calendar.

   The user receives notification in the Personal Home Page (PHP).

See Also

Viewing and Approving Subscription Requests

Understanding Interaction History

This topic group provides overviews 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 topics covered in this section include:

- Interaction History Overview
- What's New in This Release
- Terms and Definitions
- How does Interaction History Work?
- Interaction History's Dependencies and Integration
- Interaction History Features
- Interaction History Set Up Field Descriptions
- Interaction History Process Flow

Interaction History Overview

In today's world, we seldom interact with a company only through one channel or one person. We may first be contacted by a sales representative through a phone call or an ad sent through the mail. Later, we may contact one or more customer service representatives through email or a web chat. Perhaps if there is a problem with our billing, we may even be in contact with the billing department communicating through the fax and the phone. How can a company track all the interactions with a customer?

The following sections describe the functionalities of Interaction History.

- What is Interaction History?
- What is an Interaction?
- What is an Activity?
- What are Media and Media Items?

What is Interaction History?

Interaction History tracks all customer-agent interactions and serves as a repository for the interaction data. By tracking all contacts between human or automated agents and existing or potential customers and customer systems, Interaction History supports the development of the 360 degree customer view for the user organization. Interaction data provides the agent with a detailed history of the business's relationship with the customer, enabling agents to serve clients more effectively. Types of interactions and activity data tracked include customer, account number, agent, campaign, date and time, activity type, outcome and result of interaction or activity, along with duration, and notes. All records kept in Interaction History are a historical record.

Interaction History answers the questions, "Who is contacting us, who are we contacting, and why?" Think of it as a container or bucket for a set of activities that may have a relationship with a media item. Primary users of Interaction History are sales and marketing.

An Example

A new note is created and associated with a service request, therefore, a new interaction activity is recorded stating that the service request was updated. Interaction History records the occurrence of the interaction and the time stamp when it occurred but the details of the note are accessible from the Workbench tab or Tool menu of the service request form.

What is an Interaction?

An interaction is a point of contact (touchpoint) between an agent (human resource or automated) and a party such as a customer, a customer system, or even a potential customer. An interaction is timed and has an outcome and result that is tracked. A closed interaction is a historical record. An interaction cannot be altered or modified. A single interaction can include multiple forms of communications between the customer and the agent.

An Example

An interaction is a customer call into an agent requesting a quote on a printer. The activities include the agent obtaining a quote and sending a fax. Therefore, there are multiple activities for a single interaction.

The interaction activities are:

- Calling the agent
- The agent obtaining a quote
- The agent sending a fax

For the first activity, the media is the telephone, and the media item is a telephone call. For the second activity, the media is the fax machine, and the media item is the actual fax.

What is an Activity?

An activity is a business action performed by an agent as part of a customer interaction. Interaction activities typically relate to the communication channel (media) for which the activity occurred. Customer to agent interactions contain activities. These activities are recorded in Interaction History and can be viewed by using the Interaction History windows accessed from calling applications. Some examples of activities include an agent transferring a call, an agent emailing a marketing brochure, or a customer placing an order.

What are Media and Media Items?

Media represent communication occurrences handled by a CRM application or a user. They are generated directly by a customer, an agent, a system, or a CRM application and can be either inbound or outbound. Media are multiple types of communication that can be associated with an activity.

A single media can be associated to multiple activities. Media items relate to the actual media and activity. Examples of a media item are a telephone, a computer, or a fax machine. The following table describes examples of media and media items.

What's New In This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for Interaction History:

- Viewing Migrated 3i Attachments in Forms
- Importing Mass Data
- Viewing Open or Closed Activities
- SMTP Email Identifier Available
- Integration With Scripting

Viewing Migrated 3i Attachments

One of the functions of the Oracle 3i Interaction Manager, was the capability to bind attachments to 3i interactions. Since the Interaction History module now handles many of it functions, how do you view attachments from an older application? This release allows you to view attachments that were created with the Oracle 3i Interaction Manager. Contact Oracle Sales Online documentation for procedures on how to migrate the documents in order to view them.

In the forms version, interactions with attachments have a highlighted paper clip icon. If there is no attachment associated with the interaction, the paper clip icon is inactive. In the HTML version, attachments are indicated with a paperclip icon in the attachment column in the Interactions Filtering Criteria tab.

An Example

A customer site completes a migration from Oracle CRM 3i to 11i. Data is migrated from 3i Interaction Manager records to 11i Interaction History records. An agent using the 11i Customer Care Application invokes all interactions. A customer’s set of interactions is displayed.

Importing Mass Data

Interaction History can mass import data from third parties. Interaction History has the ability to accept multiple interactions, activities, or media items and upload them into the Interaction History table. Staging tables are created where the calling application can upload their data. The structures of the staging table are similar to the Interaction History tables with two additional columns: SESSION_NO and STATE_FL. Upon completion, the data is handled and viewed the same way that other interactions from Interaction History are recorded. Once it has been imported, it can be viewed through Forms or HTML.

An Example

A company out sources a mass mailing campaign to a third party. When the company receives the responses back, they can keep track of the touchpoints to use in an analysis of their marketing campaign. The company can use the marketing tool to look at all the interaction history.

Viewing Open or Closed Activities

An Active Status column on both the HTML and Forms-based module appears in the Interaction History window on the Interactions and Activities tabs. In Forms, the column has a red "X" for closed interactions and a green check mark for interactions that are still open. In HTML, the check box is checked if it has an active status.

SMTP Email Identifier Available

Fulfillment uses a Java Mail API to create email messages. Each message has an identifier which is called the SMTP ID. The SMTP ID can be retrieved and stored as part of an interaction activity in the Interaction History module. The Fulfillment server will fetch the SMTP ID for outgoing emails that are sent directly through the SMTP connection. Interaction History exposes the SMTP ID in the table for calling applications to use.

Integration With Scripting

Interaction History records customer touch points and the script transaction identifier is associated with the activity resulting from the interaction. For example, if the activity of service request is created and a script was used during the touch point then the scripting identifier is written to Interaction History and associated with the activity. By recording the script transaction identifier, you can determine what script was used in the touch point and gain insights into what was actually communicated to the customer.

Interaction History’s ADD_ACTIVITY and UPDATE_ACTIVITY APIs are enhanced to allow the SCRIPT_TRANS_ID to be passed when an activity is created and updated. A SCRIPT_TRANS_ID field is added to the JTF_IH_ACTIVITIES table to store the script transaction identifier. It is not a required field.

An activity type of "Script" is also added so that a calling application creates an activity type of script even if no other activities are performed relative to the script. This ensures that a script transaction related to the touch point is still recorded. For this release, no changes are made to Interaction History’s Agent user interfaces.

An Example

A customer places a call into a call center to complain about the lack of service he received. The agent (customer service representative) uses a script to communicate with the customer and a service request is created. When the activity of service request is created and written to Interaction History, the script transaction identifier is passed through an API and stored as associated to the activity. The next time this customer calls, any agent can check which script was used and have an exact understanding of what transpired.

Terms and Definitions

The following table describes Interaction History terms and definitions.

Interaction History Terms and Definitions

Term	Description
Activity	An activity is a business action performed by an agent such as sending a fax, updating a service request, or creating a note.
Component	A component is a coherent package of software implementation that: ■ Is independently developed and delivered ■ Has explicit and well-specified interfaces for the services it provides ■ Has clearly defined interfaces for services it expects from others ■ Composed with other components customizing some of their properties, without modifying the components themselves
Framework	A framework is a collection of collaborating classes. The interaction framework dictates the architecture. It defines the overall structure, its partitioning into classes and objects, the key responsibilities, how the classes and objects collaborate, and the thread of control.
Interaction	An interaction is a touch point that occurs between a customer, a customer system, a resource, or a resource system. An example of a touchpoint is a phone call between an agent and a customer. Interactions include activities, media, and media items.
Interaction History (IH)	IH provides CRM applications with a common framework for capturing and accessing all "interaction" data associated with customer contacts. IH acts as the central repository and provides a consistent API for tracking all automated or agent-based customer interactions.

Interaction History Terms and Definitions

Term	Description
Media	Media represents the communication channel through which an activity takes place. Examples can include: the phone, the fax machine, an ATM, or a cell phone.
Media Device	A media device is a type of media controller that resides outside of software. Not all media have media devices. An example of a media device is a phone.
Media Item	Media items represent a communication occurrence that is handled by a CRM Application or user. They are generated by a customer directly, the agent, the system, or a CRM Application and can be inbound or outbound. Media items are multiple types of communication associated with an interaction. They are generated by a customer, the system, or an application and can be inbound or outbound.
Media Item Life Cycle	A Media Item Life Cycle is a unit of time associated with the handling of a media item. For example, a call that is in the ACD queue for 10 seconds, the IVR for 20 seconds, worked by agent 'JSMITH' for 45 seconds and then by agent 'JDOE' for 20 seconds has four segments in its lifecycle.
Media Meta Data	Media Meta Data is data that is associated with a particular type of media. The information adds additional context to the media or provides information on how to gain access to the media. Examples of media meta data include IVR, ANI, DNIS for telephone calls, and To, From, Subject, and Classification for emails.
Media Provider	A media provider is the source or entry point of media into a call or service center. It can be the creator of the media of the gateway by which media enters the system. Often it will provide a staging area for the media to reside in until it is ultimately delivered to the consumer. Examples of media providers are ACD queues, predictive servers, and email servers.
Media Type	A media type describes the broad classification that a media item can be grouped into. Media that fall into a single media type typically have the same media provider, queuing, and media controller. Examples of media types are email, inbound telephone calls, outbound telephone calls, mail, ATM, and faxes.
Object	An object is any identifiable individual or thing. It can be physical, such as a telephone or PBX, or an abstract concept, such as a market campaign.

Interaction History Terms and Definitions

Term	Description
Tasks	A task is a discrete unit of work that is assigned to one or more individuals. Tasks are managed by the task management system. Tasks are often scheduled events and have defined expirations.
Task Group Templates	A task template is a skeleton or surrogate task. A task group template is a grouping of different task templates defined during set up.
Task Manager	Task Manager manages tasks throughout other applications. Task Manager provides a mechanism for tasks to be created, assigned, managed, sorted, and prioritized to provide timely response to customer issues.
Task Types	A task can be of many types which are defined during a set up process. A task type, such as a call back, defines the task. A task type defines the load for the task, effective dates and resources needed for the task.
Work	Work is broadly defined as a collection of items presented to an agent through the CRM E-business application to be processed. Work items can be either a media item or a task.

How does Interaction History Work?

When a customer-agent interaction occurs, the interaction data is captured and tracked within Interaction History.

The following is an example of the types of interaction and activity data that is tracked:

- Customer
- Account Number
- Agent
- Campaign
- Date and Time
- Activity Type (Media and Activity)
- Outcome or Result of Interaction or Activity
- Duration
- Notes

Interaction History's Dependencies and Integration

Interaction History is integrated with the following Oracle CRM applications.

- Oracle Multi-Channel Manager
- Oracle iCenter
- Oracle Advanced Outbound
- Oracle Universal Work Queue
- Oracle Customer Care
- Oracle Support
- Oracle Telesales

Interaction History Features

Within Interaction History, you can view customer-agent interactions, activities and notes. Interactions can be filtered by customer, agent, campaign, date range, and account number. Activities can be filtered by customer, agent, activity type, media type, and date range. Notes that exist for customer-agent interactions and activities are available for viewing in Interaction History.

Interaction History Set Up Field Descriptions

The following table describes field types in the Outcomes window of Interaction History.

Interaction History Outcome Window Descriptions

Field Label	Field Type	Description
Update	Button	Check any boxes you want to change in the Select column, then click this button to update the outcome records.
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new outcomes.

Interaction History Outcome Window Descriptions

Field Label	Field Type	Description
Code	Text Field	Enter the code name of the outcome.
Short Description	Text Field	Enter the full name of the outcome.
Long Description	Text Field	Enter a detailed description of the outcome.
Recycling Code	Text Field	Enter the outcome code as either positive or negative. Numeric values are assigned.
Positive Outcome	Check Box	Select the check box for the outcome as either a positive or negative outcome. When checked, the outcome code is considered positive. It defaults to unchecked.
Generate Private Callback	Check Box	Select the check box for the outcome to indicate who can call back the customer. When checked, the original agent who interacted with the customer should callback. Defaults to unchecked.
Generate Public Callback	Check Box	Select the check box for the outcome to indicate who can call back the customer. When checked, any agents can call back the customer. Defaults to unchecked.
Results Required	Check Box	Select the check box for the outcome code must have a result associated with it. When checked, that particular outcome code requires a result code. Defaults to unchecked.

The following table describes field types in the Results window of Interaction History.

Interaction History Results Window Descriptions

Field Label	Field Type	Description
Update	Button	Check any boxes you want to change in the Select column, then click this button to update the result records.
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.

Interaction History Results Window Descriptions

Field Label	Field Type	Description
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new results.
Code	Text Field	Enter the code name of the result.
Short Description	Text Field	Enter the full name of the result. The value is displayed in the agent’s window.
Long Description	Text Field	Enter a detailed description of the result up to 1000 characters.
Positive Outcome	Check Box	Select the check box for the outcome as either a positive or negative outcome. When checked, the outcome code is considered positive. It defaults to unchecked.
Reason Required	Check Box	Select the check box to specify that the result code must have a reason associated with it. When checked, that particular result code requires a reason. Defaults to unchecked.

The following table describes field types in the Reason window of Interaction History.

Interaction History Reason Window Descriptions

Field Label	Field Type	Description
Update	Button	Check any boxes you want to change in the Select column, then click this button to update the reason records.
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new reasons.
Code	Text Field	Enter the code name of the reason.
Short Description	Text Field	Enter the full name of the reason. The value is displayed in the agent’s window.

Interaction History Reason Window Descriptions

Field Label	Field Type	Description
Long Description	Text Field	Enter a detailed description of the reason up to 1000 characters.

The following table describes field types in the Outcomes-Result window of Interaction History.

Interaction History Outcome-Result Window Descriptions

Field Label	Field Type	Description
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new outcomes-results.
Outcome	Drop-down	This read-only text field displays all available outcomes.
Result	Drop-down	This read-only text field displays all the results associated to the outcome are displayed. The results are automatically populated and are not editable.

The following table describes field types in the Result-Reason window of Interaction History.

Interaction History Result-Reason Window Descriptions

Field Label	Field Type	Description
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new result-reasons.

Interaction History Result-Reason Window Descriptions

Field Label	Field Type	Description
Result	Text Field	This read-only text field displays all the results.
Reason	Text Field	This read-only text field automatically populates the reasons associated with the result.

The following table describes field types in the Action Item window of Interaction History.

Interaction History Action Item Window Descriptions

Field Label	Field Type	Description
Update	Button	Check any boxes you want to change in the Select column, then click this button to update the Activity Type record.
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new codes and short descriptions.
Select	Check box	Select the check box for the Codes and Short Descriptions needed to complete the action.
Code	Text Field	Enter the action code in the text field.
Short Description	Text Field	Enter the action name in the text field.

The following table describes field types in the Action window of Interaction History.

Interaction History Action Window Descriptions

Field Label	Field Type	Description
Update	Button	Check any boxes you want to change in the Select column, then click this button to update the action records.

Interaction History Action Window Descriptions

Field Label	Field Type	Description
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new actions.
Code	Text Field	Enter the action code in the text field.
Short Description	Text Field	Enter the action name in the text field.

The following table describes field types in the Wrap Up window of Interaction History.

Interaction History Wrap Up Window Descriptions

Field Label	Field Type	Description
Update	Button	Check any boxes you want to change in the Select column, then click this button to update the wrap up records.
Delete	Button	Check any boxes you want to change in the Select column, then click this button to remove the item once you click Delete.
Restore	Button	Click this button to refresh the window and revert back to the original values.
Create	Button	Click this button to create new wrap ups.
Type	Text Field	Enter the wrap-up types.
Campaign	Text Field	Enter the campaign name for the wrap-up type.
Outcome	Drop Down	Use the drop-down list to select the outcomes.
Result	Drop Down	Use the drop-down list to select the results.
Reason	Drop Down	Use the drop-down list to select the reasons.

Interaction History Process Flow

The following table describes the order and process of implementing, administering, and using Interaction History.

Interaction History Process

Steps	Description	Required	Performed By
Install Release Dependencies	The following modules must be installed and stable: ▪ Resource Manager ▪ Task Manager ▪ Fulfillment ▪ Technical Architecture Customer Model	Yes	Implementor, IH Administrator
Define Additional Outcome Codes	These codes are required by the application in addition to the initial seeded values. Modify or delete existing Outcome codes.	Optional	Implementor, IH Administrator
Define Additional Result Codes	These codes are required by the application in addition to the initial seeded values. Modify or delete existing Result codes.	Optional	Implementor, IH Administrator
Define Additional Reason Codes	These codes are required by the application in addition to the initial seeded values. Modify or delete existing Reason codes.	Optional	Implementor, IH Administrator
Define Additional Action Item Codes	These codes are required by the application in addition to the initial seeded values. Modify or delete existing Action codes.	Optional	Implementor, IH Administrator
Define Additional Action Codes	These codes are required by the application in addition to the initial seeded values. Modify or delete existing Action codes.	Optional	Implementor, IH Administrator
Define the Outcome, Result, and Reason Codes	These codes are required for specific campaigns and promotions.	Optional	Implementor, IH Administrator
Define Unique Pairs of Outcome Results	Define them from existing codes in the Outcome and Result tables. These codes are required for specific campaigns and promotions.	Optional	Implementor, IH Administrator
Define Unique Pairs of Result Reasons	Define them from existing codes in the Result and Reason tables. These codes are required for specific campaigns and promotions.	Optional	Implementor, IH Administrator
Define a Wrap Up	A wrap-up is a summary of a transaction that an agent enters after completing a transaction.	Optional	Implementor, IH Administrator

Interaction History Process

Steps	Description	Required	Performed By
Importing Mass Data	Importing mass data from a legacy system allows you to view interactions in Interaction History.	Optional	IH Administrator
Search Interactions	Search customer-agent interactions by identifying criteria used in the search.	Optional	IH Administrator
View Interactions	After searching for interactions, you can view them.	Optional	IH Administrator
View Interaction Notes	View the attached notes associated with the interaction.	Optional	IH Administrator
Search Activities	Search for activities related to the interaction or customer.	Optional	IH Administrator
View Activities	View the activities associated to the interaction.	Optional	IH Administrator
View Activity Notes	View the attached notes associated with the selected activity.	Optional	IH Administrator
View Migrated Attachments	View attachments associated with an interaction that were recorded by third parties in Forms.	Optional	IH Administrator

Using Interaction History (Forms)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software.

Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser. Ensure that you are viewing the correct information for your software. 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:

- Getting Started
- Interactions
  - Searching Interactions
  - Viewing Interactions
  - Viewing Interaction Notes
- Activities
  - Searching Activities
  - Viewing Activities
  - Viewing Activity Notes
- Drilling Down on Reference Documents

Getting Started

Use Interaction History to perform the following tasks:

1. Searching and Viewing Interactions
2. Viewing Interaction Notes
3. Searching and Viewing Activities
4. Viewing Activity Notes
5. Drilling Down on Reference Documents

Since Interaction History is accessed from the Oracle Marketing Online and Oracle Sales Online applications, see their documentation to navigate to the agent windows.

Searching Interactions

You can search customer-agent interactions by identifying the criteria for which the search will be based. Filter your search by customer, agent, campaign, date range, or account number. You can also search interactions by choosing a combination of values. For example, you may need to identify all campaigns that pertain to a particular customer. Once identified, the filtered results will display in the Interactions tab in the Interaction History window. The search function is case sensitive.

Perform the following steps to search customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

1. Navigate to the Interactions Filtering Criteria Tab, and enter the criteria for searching interactions in any of the following fields:
   a. In the **Customer** field, enter the customer's name.
   b. In the **Agent** field, enter the agent's name.
   c. In the **Campaign** field, enter the campaign name.
   d. In the **Date** from and to fields, click the LOV button in each field to display the calendar. Click the date on the calendar from which to begin the search. You may also specify the time. Click **OK**.

The date will display in the Date from field and you will automatically proceed to the Date to field.

2. Click the date on the calendar to end the date range. You can also specify the time. Click **OK.**

   The date will display in the Date to field.

3. In the **Account** field, enter the customer's account number.

4. Click the **Search** button.

   The interactions that exist for the search performed will display in the Interactions tab in the Interaction History window.

Viewing Interactions

Once you filter the interactions for viewing, the data associated to the interactions displays in the Interactions tab. Any notes that were entered for an interaction in the Oracle CRM application will display in the modal window of the Interactions tab.

Perform the following steps to view customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

1. From the Interactions tab, click the interaction to view or use the scroll bar to scroll through the interactions.

   - The interaction data is grouped within columns and rows. Dragging your mouse over the heading of a column displays a description of the column as a tool tip. Expand or collapse columns in the Interactions tab as needed.
   - By default, the first interaction that matches the criteria for the search will be highlighted. A sort indicator appears in the column header for the column for which the primary sort occurred. A record indicator will display for the row currently highlighted.
   - Scroll across the Interactions tab to view the columns information for the interaction.
   - Any notes that were entered for an interaction displays in the modal window of the Interactions tab.

2. Close the Interaction History window when finished.

Viewing Interaction Notes

Perform the following steps to view notes in Interaction History.

Prerequisites

A note must have been entered for the customer-agent interaction in an Oracle CRM application.

Steps

1. From the Notes window in the Interactions tab, select the note to view.
2. When finished viewing the interaction note, click another interaction to view another note or close the Interaction History window to exit from the interaction view.

Searching Activities

You can search customer-agent interactions by activity. Filter your search by customer, agent, activity type, media type, date range, or account number. You can also search activities by choosing a combination of search parameters. For example, search for activities by activity type, customer, and date range.

Once you identify the search parameters, the filtered results displays in the Activities tab in the Interaction History window. The search function is case sensitive. Perform the following steps to search activities within customer-agent interactions.

Prerequisites

An activity must exist for the customer-agent interaction in Interaction History and the calling application.

Steps

1. Navigate to the Activities Filtering Criteria tab, enter the criteria for searching activities in any of the following fields:
   a. In the **Customer** field, enter the customer’s name.
   b. In the **Agent** field, enter the agent’s name.

c. In the **Activity Type** field, enter the type of activity.

d. In the **Media Type** field, enter the type of media.

e. In the **Date** from and to fields, click the of values button in each field to display the calendar. Click the date on the calendar from which to begin the search. You can also specify the time. Click **OK**.

   The date will display in the Date from field and you will automatically proceed to the Date to field.

2. Click the date on the calendar to end the date range. You can also specify the time. Click **OK**.

   The date will display in the Date to field.

3. Click the **Search** button.

   The activities that exist for the search performed will display in the Activities tab in the Interaction History window.

Viewing Activities

Activities performed for a customer-agent interaction in a calling application are viewed from the Activities tab in Interaction History. Perform the following steps to view activities for customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

1. From the Activities tab, click the activity to view or use the scroll bar to scroll through the activities.

   - The activity data is grouped within columns and rows. Drag your mouse over the heading of a column to display a description of the column as a tool tip. Expand and collapse columns in the Activities tab as needed. By default, the activity that matches the criteria for the search will be highlighted. A sort indicator will appear in the column header for the column for which the primary sort occurred. A record indicator will display for the row currently highlighted.

- Scroll across the Activities tab to view the columns information for the activity. Any notes that were entered for an activity in the Oracle CRM application will display in the modal window of the Activities tab.

2. When finished viewing activities, click another activity or interaction to view.

Viewing Activity Notes

Notes that have been entered for an interaction activity will display in the modal window in the Activities tab.

Perform the following steps to view activity notes.

Prerequisites

A note must have been entered for the interaction activity in an Oracle CRM application.

Steps

1. From the Notes window in the Activities tab, select the note to view.
2. When finished viewing the activity note, click another activity to view another note or close the Interaction History window to exit from the activity view.

Drilling Down on Reference Documents

Perform the following steps to drill down on reference documents.

Prerequisites

- A customer-agent interaction must exist in Interaction History.
- The calling application has registered object in JTF_OBJECT and a parameter is passed.

Steps

1. Navigate to the Activities tab and click the activity to view or use the scroll bar to scroll through the activities.
2. If a reference document exists for the activity, click the **paperclip icon** on the toolbar.

   The Attachment window opens and displays the related document.

Using Interaction History (HTML)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser.

Ensure that you are viewing the correct information for your software.

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

The topics covered in this group include:

- Getting Started
- Interactions
  - Searching Interactions
  - Viewing Interactions
  - Viewing Interaction Notes
- Activities
  - Searching Activities
  - Viewing Activities
- Changing Profile Options

Getting Started

Use Interaction History to perform the following tasks:

1. Searching and Viewing Interactions
2. Viewing Interaction Notes
3. Searching and Viewing Activities
4. Viewing Activity Notes

Since Interaction History can be accessed from other applications, there are several ways to get to the Interaction window.

Searching Interactions

You can search customer-agent interactions by identifying the criteria for which the search will be based. Filter your search by customer, agent, campaign, date range, or account number. Search interactions by choosing a combination of values.

Perform the following steps to search customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

1. Navigate to the Interactions window and click the **Advanced Search** hyperlink.

   The Interactions Filtering Criteria window opens.

2. Enter any of the following criteria:

   a. In the **Customer** field, enter the customer's name.

   b. In the **Agent** field, enter the agent's name.

   c. In the **Campaign** field, enter the campaign name.

   d. In the **Account** field, enter the account name.

   e. For the **Date** fields, select the **Date Picker** and enter your dates.

3. Click **Go** or **Apply**.

   a. If you click **Go**, the Selection window opens with a list of hyperlinks. You can then make your selection, which the Interaction Filtering Criteria window reappears with your selection.

b. If you click **Apply**, the Interaction Search Results window opens a list based on your defined parameters.

Viewing Interactions

Once you filter the interactions for viewing, the data associated to the interactions displays in the Interactions window. Perform the following steps to view customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

1. Navigate to the Interactions window.

   You can view a list of all interactions with the relevant criteria.

2. Close the window when you are finished.

Viewing Notes in Interaction History

Perform the following steps to view a note in Interaction History.

Prerequisites

A note must have been entered for the customer-agent interaction in a calling application.

Steps

1. Navigate to the Interactions window. Scroll to the right to see the Note Interactions column. If there is a note attached, click the note icon to view it.
2. When finished viewing the interaction note, click another interaction to view another note or close the Interaction History window to exit from the interaction view.

Searching Activities

You can search customer-agent interactions by activity. You can filter your search by customer, agent, activity type, media type, date range, or account number. You may also search activities by choosing a combination of search parameters. For example, you could search for activities by activity type, customer, and date range.

Once you identify the search parameters, the filtered results will display in the Activities tab in the Interaction History window. The search function is case sensitive.

Perform the following steps to search activities within customer-agent interactions.

Prerequisites

An activity must exist for the customer-agent interaction in Interaction History and the Oracle CRM application.

Steps

1. Navigate to the Interactions window. Since Interaction History is called by other applications, the path will vary.
2. Click the **Advanced Search** hyperlink.

   The Activities Filtering Criteria window opens.
3. Enter the criteria for searching activities in any of the following fields:
   a. In the **Customer** field, enter the customer’s name.
   b. In the **Agent** field, enter the agent’s name.
   c. In the **Activity Type** field, enter the type of activity.
   d. In the **Media Type** field, enter the type of media.
   e. In the **Date** from and to fields, click the of values button in each field to display the calendar. Click the date on the calendar from which to begin the search.

      You can also use wildcards.
4. If you entered criteria in one field and select **Go**, then the appropriate Select window will open with a list of choices. Click on your choice.

   The Activity Filtering Criteria window reappears populated with your selection.
5. Click **Apply**.

   The Activity window opens with your selection having limited the list of activities.

6. Sign out when you are finished.

Viewing Activities

Activities performed for a customer-agent interaction in an Oracle CRM application are viewed from the Activities window. Activity columns can include:

- Customer
- Agent
- End Date
- Direction
- Source
- Campaign
- Outcome
- Result
- Reason
- Action
- Activity Type
- Type
- Role
- Whether it is currently active or not
- Any attached notes

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

1. Navigate to the Activities window. Since Interaction History is called by other applications, the path will vary.

   You can view a list of all interactions with the relevant criteria.

2. To narrow your search, use the list of values (LOVs) in the Media Type, Source, Activity Type, or use the date picker to narrow the date range. Click **Apply.**

The results of your selection are displayed again in the Activities window.

3. Close the window when you are finished.

Changing Profile Options

Use the Interaction History preferences to make changes to your profile. Perform the following steps to modify your personal preferences.

Prerequisites

None

Steps

1. Click **Profile** in the top right corner of the window.

   The Personal Preferences window opens. You can change your password on this page as well as make other selections:

   - Navigation Preferences
   - Display Preferences
   - Quick Menu
   - Change Password
   - Personal Information
   - Address Information
   - My Enrollments

2. Under Personalization you can select the following:

   a. Use the **Navigation Preferences** to switch Responsibility or Set Default Responsibility.

   b. Use the **Display Preferences** to make changes to language, user currency, date format, display style, or table display.

   c. Use the **Quick Menu** to set up your Favorite Menus.

3. Under Account Settings you can select the following:

   a. Select **Change Password** to change your password.

   b. Select **Personal Information** to update your name or email.

4. Select **Address Information** to make changes to your address.

5. Select **My Enrollments** to make changes to your enrollments.
6. Click **Update** when you are done changing your preferences.

   Your changes are saved.

Administering Interaction History (Forms)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser. Ensure that you are viewing the correct information for your software.

This topic group provides task-based procedures that are required for ongoing system maintenance and includes information on administration tools and utilities. The topics covered in this group include:

- Overview of Interaction History Administration
- Defining Outcomes
- Defining Results
- Pairing an Outcome With a Result
- Pairing a Result with a Reason
- Defining a Wrap-Up
- Importing Mass Data

Overview of Interaction History Administration

Use Interaction History setup windows to define outcomes, results, and reason codes. These attributes are defined so that users can assign them to interaction records.

Outcome: The outcome is the immediate response to an agents call. To close an interaction, the agent must report an outcome. Examples of outcomes include contact busy, no answer, sale customer complaint, bad phone number, answering machine, or need to call back. Interactions and activities must have a valid outcome code.

Result: A result of an interaction or activity. A result of a transaction is the business related consequence of the agent's call such as Sale or No Sale, or Complaint. For example, the interaction resulted in a sale. While all transactions must have an outcome, a result is not mandatory.

Reason: A reason for the result of an interaction or activity. For example, the reason the interaction resulted in a no sale was that the customer thought the product was too expensive. In this case, the reason is "too expensive". Other reasons of why the interaction resulted in a no sale can include no money, already gave at the office or out of work.

Use the Interaction History Administration window to define attributes that users can assign to interaction records. This section covers the following tabs in the Interaction History Administration window:

- Outcomes
- Results
- Outcome-Results
- Results-Reasons
- Wrap-Ups

Defining Outcomes

The outcome is the immediate response to an agent's call, such as Contact, No Answer, or Busy. One outcome can be used by more than one campaign. To close an interaction, the agent must report an outcome. Perform the following steps to define the outcomes that the agent can use.

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Outcomes tab.

   The Outcome Code and Short Description fields must be defined. Some pre-defined values are available for these fields.
3. Click the Outcome Code field and choose **View > Find All**.

   The pre-defined values are now visible in the Outcome Code and the Short Description fields.
4. Select the Up or Down arrow keys to review all the pre-defined values. You can also enter your own values in either field.
5. If you need to use Numeric Values, select the **Telephony Related** check box.
6. Select either Success option–Yes or No–and enter the appropriate Numeric Value.

   Yes has a range of 1 to 100; No has a range of 101 to 255.
7. Choose whether the outcome requires a Private or Public callback.
8. Choose **File >Save and Proceed** to save the outcome definition.

Guidelines

Some telephony-related applications use Numeric Values, which are recorded as the Versatility Code in database tables. Versatility Codes are used by version 3i of the following applications: Oracle TeleBusiness for Telecom / Utilities, Oracle TeleBusiness for Financial Services, Oracle Integration Manager, and Oracle Campaign Plus. If you do not use these earlier applications, you do not need to use Numeric Values.

Defining Results

A result of a transaction is the business-related consequence of the agent’s call, such as Sale, No Sale, or Complaint. While all transactions must have an outcome, a result is not mandatory.

Perform the following steps to define a result.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Results tab.

   The Results Code and Short Description fields must be defined. Some pre-defined values are available for these fields.
3. Click the Results Code field and choose **View > Find All**.

   The pre-defined values are now visible in the Results Code and the Short Description fields.
4. Click the Up or Down arrow keys to review all the pre-defined values. You can also enter your own values in either field.
5. If the business rules of the enterprise require a Reason for every Result, select the **Reason Required** check box.

   You may also define Result-Reason pairs. See Pairing a Result with a Reason.
6. Choose **File > Save and Proceed** to save the result definition.

Pairing an Outcome with a Result

You can create a new option by pairing an Outcome with a Result. Any Outcome may be paired with more than one Result. Each pair appears as one option on the agent's screen.

Perform the following steps to pair an outcome with a result.

Note: Each Outcome-Result pair must be unique.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.

2. Select the Outcome-Results tab.
3. Select a value from the Outcomes list.
4. Select a value from the Results list.
5. Choose **File > Save and Proceed** to save the Outcome-Result pair.

Guidelines

The values on the Outcomes list are defined on the Outcomes tab. The values on the Results list are defined on the Results tab.

See Also

- Defining Outcomes
- Defining Results

Pairing a Result with a Reason

You can create a new option by pairing a Result with a Reason. Any Result may be paired with more than one Reason. Each pair appears as one option on the agent's screen.

Perform the following steps to pair a result with a reason.

Note: Each Result-Reason pair must be unique.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Result-Reasons tab.
3. Select a value from the Result list.
4. Select a value from the Reason list.
5. Choose **File > Save and Proceed** to save the Result-Reason pair.

Guidelines

The values on the Results list are defined on the Result tab. The values on the Reasons list are defined on the Reason tab.

See Also

Defining Results

Defining a Wrap-Up

A wrap-up is a summary of a transaction that an agent enters after completing a transaction. A Promotion code and Campaign Type are essential elements in the definition of a wrap-up. When an agent is working on a specific promotion, the wrap-ups defined for that promotion become available on the agent's window.

Business rules determine whether or not to include the Outcome Code, Result Code and Reason Code in the definition of the wrap-up.

Perform the following steps to define a wrap-up for an interaction.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Wrap-Up tab.
3. Choose values for Promotion Code and Campaign Type. Choose values for the remaining codes when required.
4. Choose **File > Save and Proceed** to save the wrap-up definition.

Importing Mass Data

Interaction History can mass import data from third parties and legacy systems. Use the concurrent manager to schedule regular mass imports. Interaction History Mass Import is a new responsibility. The system administrator can define the concurrent program to reference the PL/SQL procedure JTF_IH_IMPORT_GO_IMPORT.

Importing mass data consists of four sections:

a. Loading your data into the staging tables
b. Setting up the menu item for Interaction History Import
c. Running the concurrent manager to actually move your files from the staging tables to the IH tables
d. Verifying that the procedure was correctly executed
e. Deleting the rows from the staging tables when you are finished

Perform the following steps to mass import data your data. There are many tools to load the data into the staging table. This procedure can be deferred to off-peak hours.

Prerequisites

- You must first prepare the data to be transferred to the staging tables.
- You must have the Interaction History Mass Import responsibility.
- You must load your data into the three staging tables which mirror the IH tables:
  - JTF_IH_INTERACTIONS_STG
  - JTF_IH_ACTIVITIES_STG
  - JTF_IH_MEDIA_ITEMS_STG

Guidelines for Uploading Your Data to the Staging Tables

The staging tables have a similar structure to the IH tables with the addition of three columns:

- SESSION_NO: The Session number, which counts through a sequence
- STATE_FL: This is the flag of state of record after the import. The flag can only have three values, 0 error, or 1 passes referential integrity checks, 2 successfully uploaded.
- SESSION_DATE: The date that the import is run.

The following table describes the required fields for JTF_IH_INTERACTIONS_STG.

Required Fields for JTF_IH_INTERACTIONS_STG

Field	Notes if Applicable
INTERACTION_ID	Primary key

Required Fields for JTF_IH_INTERACTIONS_STG

Field	Notes if Applicable
CREATION_DATE	None
CREATED_BY	None
LAST_UPDATE_DATE	None
LAST_UPDATED_BY	None
OUTCOME_ID	Foreign key to the table JTF_IH_OUTCOMES_STC
HANDLER_ID	Foreign key to the table FND_APPLICATION
PARTY_ID	Foreign key to the table HZ_PARTIES
TOUCHPOINT1_TYPE	None
TOUCHPOINT2_TYPE	None
ACTIVE	None

The following table describes the required fields for JTF_IH_ACTIVITIES_STG. Note that if JTF_IH_ACTIVITIES_STG has a value for MEDIA_ID, then MEDIA_ID must exist in JTF_IH_MEDIA_ITEMS_STG or in JTF_IH_MEDIA_ITEMS.

Required Fields for JTF_IH_ACTIVITIES_STG

Field	Notes if Applicable
ACTIVITY_ID	Primary key
CREATION_DATE	None
CREATED_BY	None
LAST_UPDATED_BY	None
LAST_UPDATED_DATE	None
INTERACTION_ID	Foreign key to the table JTF_IH_INTERACTIONS
ACTION_ITEM_ID	None
ACTIVE	None
OUTCOME_ID	None

The following table describes the required fields for JTF_IH_MEDIA_ITEMS_STG.

Required Fields for JTF_IH_MEDIA_INTEMS_STG

Field	Notes if Applicable
MEDIA_ID	None
ACTIVE	None
CREATED_BY	None
LAST_UPDATED_BY	None
CREATION_DATE	None
LAST_UPDATE_DATE	None
MEDIA_ITEM_TYPE	None

Steps for Setting Up the Menu Item for Interaction History Import

1. From the System Administrator responsibility, select **System Administrator.**

   The Navigator - System Administrator window opens.

2. Select **Security > User > Define.**

   The Users window opens.

3. From the menu, select **View > Find**.

   The Users Dialog window opens.

4. Type "Sys" with a wildcard and click **Find**.

   The System Administrator name is highlighted.

5. Click **OK**.

   The Users window is populated and reopens.

6. In the Responsibility area, place your cursor in the Responsibility field and go to the menu and select **File > New**.

   A new row is vacant.

7. Click the **List of Values** (LOVs).

   The Responsibilities window opens with a list of responsibilities for the System Administrator.

8. Select **Interaction History Import** and click **OK**.

   The Users window opens with your selection.

9. Save and exit.

Steps for Running the Concurrent Manager

1. From the System Administrator responsibility, select **Interaction History Import.**

   The Navigator - Interaction History window opens.

2. Select **Requests**.

   The Find Requests window opens.

3. Click **Submit a New Request**.

   The Submit a New Request window opens.

4. Select the **Single Request** and click **OK**.

   The Submit Request window opens.

5. Click the **LOV** in the Name field.

   The Interaction History Data Import populates in the Name field.

6. Click **Submit**.

   A Decision window opens stating that the request was submitted and giving you a Request ID. It asks if you want to submit another request.

7. Click **No**.

Deleting Staging Table Rows

If you decide to reload or load additional data into the staging tables you must first delete the current data before adding new data.

Troubleshooting

If you encounter any problems with the Concurrent Manager, you can start the IH mass import procedure from SQL*Plus by calling the stored procedure JTF_IH_IMPORT.GO_IMPORT.

Optional parameter to this procedure is:

NCntTransRows (NUMBER): Number of interactions in one database transaction.

Testing

For testing purposes, stored procedure JTF_IH_IMPORT.GO_TEST can be called. This procedure tests the data in stage tables that is intended for mass import without writing it into the IH tables.

Administering Interaction History (HTML)

This CRM Application Foundation documentation reflects the recent expansion of some of the CRM Application modules to include HTML based functionalities. Certain CRM Application modules are available either through an Oracle Forms interface, or through an HTML browser user interface. The Calendar, Notes, and Tasks modules can be accessed through a single, integrated HTML interface. In these cases, the functionality is similar or duplicated, in both the HTML and Forms versions of the software. Other CRM Application modules have added new functionality that is strictly HTML based. For example, the Lookup Tool in the Territory Manager module can only be accessed through a HTML browser.

Ensure that you are viewing the correct information for your software.

This topic group provides task-based procedures that are required for ongoing system maintenance and includes information on administration tools and utilities.

The topics covered in this group include:

- Setting Up Interaction History
- Defining Outcomes
- Defining Results
- Defining a Reason
- Pairing an Outcome With a Result
- Pairing a Result with a Reason
- Defining an Action Item
- Defining an Action
- Defining a Wrap-Up

Setting Up Interaction History Administration

Use the Interaction History Administration window to define attributes that users can assign to interaction records. Defining attributes in either Forms or HTML will equally affect the Interaction History module.

This section covers the following windows in the Interaction History Administration window:

- Outcomes
- Results
- Reasons
- Outcome-Results
- Results-Reasons
- Actions
- Wrap-Ups

Defining Outcomes

The outcome is the immediate response to an agent's call, such as Contact, No Answer, or Busy. One outcome can be used by more than one campaign. To close an interaction the agent must report an outcome. Perform the following steps to define outcomes that the agent can use.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter the URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp

2. Enter your user ID and password in the appropriate fields.
3. Select the Outcome tab.

   The Outcome window opens.

4. (Optional) Update an existing code by entering the appropriate information, select the appropriate check box, and click **Update.**

a. The Outcome code and Short Description fields must be defined.

b. Enter a long description.

c. Choose whether the outcome requires a positive outcome, a result, or a Private or Public callback.

d. Select the appropriate check box, and click **Update** to save.

5. Click **Create** to create a new outcome.

   The Create Outcome window opens.

6. Enter the required information.

7. Click **Save** to save your work.

Defining Results

A result of a transaction is the business-related consequence of the agent's call, such as Sale, No Sale, or Complaint. While all transactions must have an outcome, a result is not mandatory. Perform the following steps to define a result.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter the URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp

2. Enter your user ID and password in the appropriate fields.

3. Select the **Result** tab.

   The Result window opens.

4. (Optional) Update an existing code by selecting the appropriate check box, entering the appropriate information, and clicking **Update.**

   a. Select your Result code.

   b. Enter a long description.

   c. Choose whether the outcome requires a positive outcome or whether a result is required.

   d. Select the appropriate check box, and click **Update** to save.

5. Click **Create** to create a new result.

   The Create Result window opens.

6. Enter the required information.
7. Click **Save** to save your work.

Defining a Reason

Perform the following steps to define a reason.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter the URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp

2. Enter your user ID and password in the appropriate fields.
3. Select the **Reason** tab.

   The Reason window opens.

4. (Optional) Update an existing code by entering the appropriate information and click **Update.**

   a. Select your Reason code.

   b. Enter a long description.

   c. Click **Update** to save.

5. Click **Create** to create a new reason.

   The Create Reason window opens.

6. Enter the required information.
7. Click **Save** to save your work.

Pairing an Outcome with a Result

You can create a new option by pairing an Outcome with a Result. Any Outcome may be paired with more than one Result. Each pair appears as one option on the agent's screen.

Note: Each Outcome-Result pair must be unique.

Perform the following steps to pair an outcome with a result.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter the URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp

2. Enter your user ID and password in the appropriate fields.
3. Select the **Outcome-Result** tab.

   The Outcome-Result window opens.

4. Click **Create** to create a new Outcome-Result.

   The Create Outcome-Result window opens.

5. Choose your required information from the drop-down menus.
6. Click **Save** to save your work.

Pairing a Result with a Reason

You can create a new option by pairing a Result with a Reason. Any Result may be paired with more than one Reason. Each pair appears as one option on the agent's window.

Perform the following steps to pair a result with a reason.

Note: Each Result-Reason pair must be unique.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter the URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp
2. Enter your user ID and password in the appropriate fields.
3. Select the **Result-Reason** tab.

   The Result-Reason window opens.
4. Click **Create** to create a new Result-Reason.

   The Create Result-Reason window opens.
5. Choose your required information from the drop down menus.
6. Click **Save** to save your work.

Defining an Action Item

Perform the following steps to define an action item.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter the URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp
2. Enter your user ID and password in the appropriate fields.
3. Select the **Action Item** tab.

   The Activity Type window opens.
4. Click **Create** to create a new action item.

   The Create Action Item window opens.

5. Enter a code and short description.
6. Click **Save** to save your work.

Defining an Action

Perform the following steps to define an action.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter its URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp
2. Enter your user ID and password in the appropriate fields.
3. Select the **Action** tab.

   The Actions window opens.
4. Click **Create** to create a new action.

   The Create Action window opens.
5. Enter a code and short description.
6. Click **Save** to save your work.

Defining a Wrap-Up

A wrap-up is a summary of a transaction that an agent enters after completing a transaction. A Promotion code and Campaign Type are essential elements in the definition of a wrap-up. When an agent is working on a specific promotion, the wrap-ups defined for that promotion become available on the agent's window.

Business rules determine whether or not to include the Outcome Code, Result Code and Reason Code in the definition of the wrap-up.

Perform the following steps to define a wrap-up for an interaction.

Prerequisites

None

Steps

1. To open the jtflogin.jsp page, enter the URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp

2. Enter your user ID and password in the appropriate fields.
3. Select the **Wrap Ups** tab.

   The Wrap Ups window opens.

4. Click **Create** to create a new Wrap Up.

   The Create Wrap Up window opens.

5. Enter the required information.
6. Click **Save** to save your work.

Understanding Fulfillment

This topic group provides overviews of Fulfillment and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications. This section covers the following topics:

Fulfillment Overview

Note: 1-to-1 Fulfillment is a module that is called from other CRM applications. It is not designed to be, nor should it be, used as a stand-alone product.

The following topics describe Fulfillment and its use:

- What is a Fulfillment?
- Who Uses Fulfillments?
- What is a Fulfillment Server?
- What is a Query?
- What are Datasource Files?
- What Are Some Elements of Fulfillments?

What is a Fulfillment?

Fulfillment is defined as an automated way to send information to customers. It provides the ability to immediately satisfy a customer's requests for information, literature, and other correspondence. Customer Service Representatives handle a variety of requests ranging from product and service inquiries, pricing questions, billing inquiries, and general customer care issues. Many of these requests will result in some dissemination of literature, collateral, forms of application, letters, or correspondence to the customer. Fulfillment provides the ability for call center administrators, mobile field representatives, marketing managers, customer care representatives, and other service agents to respond to different customer needs quickly and easily using email.

Some Key Features of Fulfillment Include:

- Providing automated delivery of information to customers using email
- Supporting multiple types of customized Fulfillments used in CRM applications such as documents, and collateral
- Prioritizing requests
- Updating customer information through Interaction History
- Merging data into formatted outgoing emails to create consistent personalized messages
- Using Oracle Workflow Builder to launch a request, manage the request as it moves through the Fulfillment cycle, monitor the status of each Fulfillment request, and notify users about the disposition of particular events

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WARNING: Windows relating to file server functionality or capability are not supported at this time, and should not be used.

These capabilities are enhancements intended for future releases, but are not available in the current release of Fulfillment.

Who Uses Fulfillments?

Customer service representatives or **agents** handle a variety of requests ranging from product and service inquiries, pricing questions, billing inquiries, and general customer care issues. Many of these requests will result in some dissemination of literature, collateral, forms of application, letters or correspondence to the customer.

By using fulfillment, **sales and marketing representatives, interaction center agents**, and **service or support personnel** can focus on each customer's unique fulfillment requirements on a one-to-one basis without spending time managing fulfillment output.

An agent using fulfillment can send out information to prospective customers that include product announcements, newsletters, lead generation and qualification campaigns, and customer service requests. Fulfillment can also be used as the mechanism to send out marketing information through marketing campaigns, like email blitzes.

What is a Fulfillment Server?

Fulfillment servers are used to monitor fulfillment requests. Servers are created with a name and a description and can include a start time and shut down time. The start time and shut down time defines when the server monitors the queue for requests. The start time and shut down time are not required values if you want the Fulfillment Server to send requests 24 hours a day, seven days a week. These servers monitor assigned queues and send out fulfillments for CRM applications such as eMail Center, Customer Service, Marketing, TeleSales, and Sales Online.

A fulfillment server administrator (or someone who has been designated as the server administrator) has the ability to create a new server, update an existing server, or restore server attributes for an existing server.

An Example

You create a marketing fulfillment server that monitors queues for marketing requests. You also create and attach a marketing email server to the marketing server and define a marketing group of people that use the email server. Once this has been completed, fulfillment emails marketing campaigns to customers when marketing applications submit a fulfillment request.

What is a Query?

A query is a SQL statement that collects specific kinds of data from the database when fulfilling a request. From the query window, you can create, update, or restore queries along with creating the files (datasource files) where the results of the query are stored.

Queries are used for generating and populating data in Master Documents dynamically. Dynamic information comes from the query and the associated bind variables and is a part of the Master Document. The bind variables contain the data that is required to process a fulfillment query. The bind variables correspond to the items required by the query. These are generally items listed in the WHERE clause of the SQL query.

For example, the bind variable for the SQL statement:

```
Select person_last_name lname from jtf_contact_points where person_first_name =
:fname
```

The first step in creating a query involves identifying the sources needed for the query. Once you obtain the sources, the bind variables, then you can use the bind variables, the SQL statement, and merge functionality to create your merged document. If you want to associate a query with a Master Document (for example, if there are merged fields to be populated with a query) select the query needed from the list of values in the Master Document selection tab and select upload. This will simultaneously upload the Master Document and associate the relevant query to the Master Document.

A single query can be associated with more than one Master Document providing that the merge field names match database column names and there is a one-to-one correspondence between the number of merge fields and the number of columns queried in the SQL query. The query must be created for a particular Master Document prior to uploading into fulfillment. Ensure that the query string queries all merge fields that need to be populated in the Master Document.

What are Datasource Files?

You can create datasource files which displays the names of the columns or the names of the column alias from a query. Use datasource files in association with Master Documents. Because datasource files access a selected query, you must create the query before attempting to create a datasource file.

What Are Some Elements of Fulfillments?

The following are key elements used in Fulfillments.

- Groups
- Templates
- Merged Data
- Master Documents

Groups

A group is any number of people or agents. For example, you may want to create two groups of marketing personnel, one for marketing current customers and the other for marketing prospective customers.

Associate agent groups with the fulfillment server, and associate output devices (email servers) with the groups. By associating a group to an email server, you indicate which group will use a specific email server. You must create an association for each agent group to each output device for which the group needs access. A server is associated to a group and an email server. Within each group, you have agents that are assigned to that group.

Templates

Templates are defined as a way to group together multiple documents and are used to support a wide range of scenarios. Administrators set up templates in advance to include specific information materials, called collateral. Collateral is static information. You can send out document information containing various information to customers at one time.

For example, you decide to create a template. This template holds multiple documents that are used in a sales campaign targeting specific customers during a specific time period. It also contains information about some of your products or services that you are offering during that certain time period. Although templates are not required, they are an efficient way to group your information.

Merged Data

Merged data is a specific chunk of data that has been taken from several sources and merged together. For example, if a company wants to send a thank you email to everyone that has inquired about their company, the resulting merged data is both the query retrieving all customers that have inquired about the company, and the associated a Master Document.

Master Documents

Master Documents can contain dynamic information or in some cases can be static documents. If documents contain dynamic merged data, it must be passed to the Fulfillment API and merged into the document or the merged data must come from a query. Master Documents are usually referred to as cover letters.

A Master Document is a dynamic document which is created once and re-used, through merging, many times. In order to merge data, Master Documents need to be HTML documents. They can be created in an HTML editor or a word processing application as long as you save as HTML.

Note: If you want to have a query associated with a Master Document, then before creating a dynamic Master Document, you must identify the SQL query needed for the document. You must have thorough SQL*Plus knowledge to perform this step.

Additionally, Master Documents can also be static information. Perhaps you want to create a Master Document and not use the dynamic functionality. Using the dynamic functionality is not a requirement. Dynamic content in Master Documents are defined by merged fields. These are enclosed within special characters, for example, << >>. The only way to include dynamic content in a Master Document is to employ merge fields. Merge fields are placeholders for bind variables and are populated through using fulfillment or SQL queries. Collateral and attachments contain static information.

Note: You cannot upload collateral in Fulfillment. You can only upload a Master Document. Collateral is created by Marketing and uploaded through the Marketing Online application.

A Master Document contains text that is used repeatedly, such as a form or a contract. You create Master Documents in a word processing application. A Master Document can have one of the following extensions:

- .zip
- .html
- .pdf

After creating a Master Document with the HTML editor of your choice, upload it to make it available for Fulfillment requests. When you upload a Master Document, it is stored in the Marketing Encyclopedia System (MES).

What's New in This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for Fulfillment:

- Faxing a Fulfillment Request
- Previewing and Printing a Fulfillment Request
- Redirecting the Finish Button
- Using the Fetch SMTP Identifier

Faxing a Fulfillment Request

In Fulfillment, there is another output method other than email to send a fulfillment request. Fulfillment has open Java interface APIs that allow integration to other custom fax solutions so you can fax fulfillment requests.

Fax Customization

To make the interface vendor independent, there is a certain amount of integration required between the Fulfillment interface and an independent fax solution provider's APIs. The integration includes writing Java code that complement the Fulfillment code with a third parties's APIs.

If the Fulfillment Server receives a fax request and a fax solution is not implemented, the Server logs an error in the Server's error log and writes to the database that it was unable to fulfill the request.

Note: Contact Oracle Support directly if you are interested in adding faxing capabilities to your E-business suite.

Previewing and Printing a Fulfillment Request

As part of this release you can:

- View previewed Fulfillment requests before they are sent to the customers
- Print previewed Fulfillment requests and save the requests as an HTML file

When the Preview Request API is called, the standard process of creating a request is performed and the request is written to a database with a Preview flag, but not sent out. You can go to the Preview window to see the request, but you cannot edit it.

The request is retrieved and appears in your default browser. You can perform certain functions using the browser's tool menu, such as, print the request, or save the request in a local location. If you preview fulfillment requests, you proactively prevent mistakes associated with sending out requests that are unchecked.

An Example

A telesales agent receives a request for information on a sales promotion. She creates a preview request for the customer and goes to the preview window to view the request with the customer data already merged in the document. After verifying the data for accuracy, she clicks on the Send Request button to send out the request or prints out a hard copy and mails it to the customer depending on the preferred output method.

Redirecting the Finish Button

In the Fulfillment Agent tabs in the Oracle Sales Online application, you can select a template and then select Master Documents, collateral, and attachments associated with the template before confirming the fulfillment request. If you select the Finish button on the Confirmation window, you will reopen the first window of the wizard.

To enhance the flexibility of the wizard, fulfillment added a new profile option called JTF_FM_DONE_DEST which allows you to redirect the Finish button to a specific destination which is determined by the application that is using the Fulfillment module. This profile option resides within the calling application's setup profile. The valid values of the destination depend upon the calling application to Fulfillment. If no profile is set, the Finish button will automatically take you back to the beginning of the Fulfillment wizard screen.

For documentation on how to set up the Finish button, refer to the implementation information of the calling application.

Using the Fetch SMTP Identifier

This feature requires the calling application to provide set up folders and login information.

Fulfillment uses a Java Mail API to create email messages. Each message has an identifier which is called a SMTP ID. The SMTP ID can be retrieved and stored as part of an interaction activity in the Interaction History module. The Fulfillment server will fetch the SMTP ID for outgoing emails that are sent directly through the SMTP connection.

See Also

Archiving Sent Emails

Terms and Definitions

The following table describes Fulfillment terms and definitions.

Fulfillment Terms and Definitions

Term	Description
Agent or User	An agent or user is the person who initiates a Fulfillment request from within a CRM application. Agents or users usually interact directly with customers, either on the phone or face-to-face. In Web-based self-service applications, a customer or prospect may be the requesting agent.
Attachment	An attachment is a document that has been generated by another application and included as part of a Fulfillment request. Attachments allow information such as bank account activity, service request status, credit information, or invoices to be sent to a customer. Attachments are static documents which are stored in the FND_LOBS table and are not necessarily associated with marketing or MES.
Collateral	Collateral is a static fulfillment document that doesn’t contain merged data. It is usually some sort of marketing brochure or some other document. It is sent in an email as an attachment. It is often called a deliverable in the marketing applications.
Customer	A customer is an individual who receives a fulfillment request.
Detail Screen	A Detail screen displays information about a specific open request, campaign, or output device.
Engine	See Fulfillment Server
Fulfillment Administrator	An administrator is a person at a management level who is responsible for creating and managing Fulfillment functions.
Fulfillment Administrative Console	The console is used to configure fulfillment servers, group, templates, queries, and locate request statuses and histories.

Fulfillment Terms and Definitions

Term	Description
Fulfillment Agent Windows	The agent’s windows is set of agent Java Server Pages (JSPs) that are provided to CRM applications for creating basic Fulfillment requests.
Fulfillment Request	A fulfillment request is the entity that is created when a request is passed to fulfillment APIs. If a request is successful, then an email is generated.
Fulfillment Server	The Fulfillment server, a Java-based multi-threaded server, processes the requests, merges data into Master Documents, dispatches final output, and logs completed request in Fulfillment History table, as well as, write to Interaction History tables if the Party ID is passed.
Fulfillment Server Monitors	The Fulfillment server has a set of internal monitors each with a specific task to ensure proper functioning of the Fulfillment server, including: Process Monitor, Request Monitor, Command Monitor, Remote Monitor, Database Monitor, and Schedule Monitor.
Process Monitor	Its function is to monitor the states of the internal Server Processes that process the Fulfillment Requests. This monitor makes sure that the correct number of Processes are allocated for performing work on the internal request queue.
Request Monitor	Its function is to monitor the Advance Queue (AQ) for incoming Fulfillment Requests and places them, in a self-limiting fashion, into an internal request queue where they can be fed into the Processes.
Command Monitor	Its function is to monitor commands received from the command prompt provided that the Fulfillment server is configured so that commands can be received. The latest version of the Fulfillment server has this feature automatically turned on. It can be turned on and off by placing the flag '-Dengine.CommandPromptEnabled=true/false' in the Fulfillment Server start script
Remote Monitor	Its function is to monitor commands received through the Fulfillment server’s command port. This port is set in the Fulfillment server start script with the flag '-Dengine.CommandPort=#####'. Without this command port, this monitor will not run.
Database Monitor	Its function is to monitor database activity following a database crash or disconnect from the database. This monitor temporarily shuts down the Fulfillment server into a sleep mode until connection to the database can be re-established.

Fulfillment Terms and Definitions

Term	Description
Schedule Monitor	Its function is to monitor the configured activity schedule for the Fulfillment server. The Fulfillment server can be configured for active and inactive scheduling throughout a day. When it is scheduled to be inactive, the Fulfillment Server enters a sleep state until the beginning of the next activity period. This monitor only runs if the Fulfillment server has been configured with a startup time and shutdown time in the Fulfillment Admin Console.
Group	A group is a set of agents or users usually related by a workgroup, function or department. Each user must belong to at least one group. These groups are associated with a Fulfillment server.
Integration Points	CRM Fulfillment integrates with other application products through APIs included with the core Fulfillment product.
Items	Items can be Master Documents, collateral, or attachments. Items are inserted in the body of an email. Items are selected from the list of all possible documents and collateral material available to the user from Fulfillment templates.
Master Document	A Master Document is a static or dynamic HTML, PDF, or zip file.
Merged Data	Merged data is a the specific chunk of data that has been taken from several sources and merged together. For example, if a company wants to send a thank you email to everyone that has inquired about their company, the resulting merged data is the query retrieving all customers that have inquired about the company.
Output	The output is the delivery medium of a Fulfillment request. Currently, only email is supported.
Prospect	A prospect is a person who is a candidate to purchase a product or service.
Query	A query is a SQL statement or list created by the administrator (or an external other) that is used to merge specific data with a Master Document. Queries can be used for batch lists, mass mailings, or mail blitzes.
Summary Window	Summary windows contain lists of things such as all open Fulfillment requests, all available campaigns, or all output devices on a server.

Fulfillment Terms and Definitions

Term	Description
Template	A template is an email package containing electronic brochures, newsletters, or other customer-oriented information that an agent sends to customers in response to a request for information. For example, an agent may use a specific template that contains a thank you letter and a brochure of the company.

Fulfillment Process Flow

The following table describes the order and process of implementing and administering Fulfillment.

Fulfillment Process

Step	Description	Required	Performed By
Install Release Dependencies	HTML Tech Stack, Interaction History, and Marketing Encyclopedia must be installed and stable.	Yes	Implementor, System Administrator
Set up the Fulfillment Administrative User	This process creates the Fulfillment Administrator. The FM Admin user is responsible for configuring the fulfillment product.	Yes	Implementor, System Administrator
Assign Role	The Fulfillment Administrator (FM Admin) must have a seeded role assigned to her.	Yes	Implementor, System Administrator
Assign Responsibility	The FM Admin user must have the JTF_FM_ ADMINISTRATOR responsibility assigned to it.	Yes	Implementor, System Administrator
Define and Configure the Fulfillment Server	The server calls on database tables to supply collateral, and sends the collateral to specified output devices.	Yes	Fulfillment Administrator
Define Fulfillment Groups and Assign Groups to Servers	Each fulfillment group must be assigned to a server.	Yes	Fulfillment Administrator
Configure Email Servers	You must associate the email servers with the Fulfillment servers.	Yes	Fulfillment Administrator
Create, Modify, and Add Groups to the Servers	You can create groups and add them to the Fulfillment Servers.	Yes	Fulfillment Administrator

Fulfillment Process

Step	Description	Required	Performed By
Add or Remove Agents to a Group	You must associate agent groups with the Fulfillment server, and associate output devices with the groups.	Yes	Fulfillment Administrator
Archive Sent Emails	If calling applications send an archived request, then the email has a message identifier called the SMTP ID which is retrieved and stored as part of an interaction activity in the Interaction History module.	Optional	Fulfillment Administrator
Configure Fax Servers	This is a customized set up and requires you to directly contact Oracle Support for set up directions.	Optional	Fulfillment Administrator
Create a New Template	A template can contain either a Master Document or collateral.	Optional	Fulfillment Administrator
Add a Master Document to a Template	Master Documents contain dynamic information or in some cases can be static documents. Master Documents are usually referred to as cover letters.	Optional	Fulfillment Administrator
Insert or Remove Collateral into a Template	Collateral is a static fulfillment document that does not contain merged data. It can be a marketing brochure or some other document. It is sent in an email as an attachment.	Optional	Fulfillment Administrator
Set up and Start the Fulfillment Server	Start the server so it can begin to process your incoming requests.	Yes	Fulfillment Administrator
Set up and Send the Remote Command of the Server	This allows you to control the server from a remote command, basically pausing the server, resuming it, and viewing it.	Optional	Fulfillment Administrator
Modify Startup Scripts for Remote Commands	Modify startup scripts so that the server will listen to remote commands.	Optional	Fulfillment Administrator
System Profile Options	Set the profile options that are needed specifically for your implementation. These options are default settings used for the fulfillment server. These parameters can be set directly in the fulfillment server start up script.	Optional	Fulfillment Administrator
Preview and Print a Request	You can preview and print a Fulfillment Request before sending it out.	Optional	Fulfillment Administrator, End User
Update a Template	You can change the name, status, or description of a template.	Optional	Fulfillment Administrator, End User

Fulfillment Process

Step	Description	Required	Performed By
Create a Query	Use a SQL statement that directs Fulfillment to collect specific types of data from the database when fulfilling a request.	Optional	Fulfillment Administrator
Create, Update, and Download a Datasource File	This is a text file that contains tab-separated merge fields that are obtained by a query. They are used as merge fields.	Optional	Fulfillment Administrator
Upload a Master Document	Uploading a Master Document makes it available for Fulfillment requests. It is stored in the Marketing Encyclopedia System (MES). This step is required if you want to send Master Document requests.	Optional	Fulfillment Administrator
Associate or Remove a Master Document to a Template	You can specifically respond to a request by choosing which Master Documents are associated to a template.	Optional	Fulfillment Administrator
Check a Request Status	You can check the status of a request.	Optional	Fulfillment Administrator, End User

Administering Fulfillment

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities. This section covers the following topics:

- Getting Started
  - Logging into Fulfillment
  - Using the Quick Find Search Feature
  - Viewing or Updating Listed Items
  - Previewing and Printing a Fulfillment Request
- Managing Templates:
  - Updating a Fulfillment Template
  - Changing a Template's Availability
  - Removing Collateral from a Template
- Managing Queries:
  - Creating a Query
  - Updating a Query
- Managing Datasource Files:
  - Creating a Datasource File
  - Downloading a Datasource File
- Managing Master Documents:
  - Associating a Master Document with a Template

- Removing a Master Document from a Template
- Uploading a Master Document to the Marketing Encyclopedia System

- Groups:
  - Creating New Groups
  - Adding a New Group to the Server
  - Adding Agents to a Group
  - Removing Agents from a Group
  - Modifying Groups
- Managing Servers:
  - Modifying Fulfillment Servers
  - Reconfiguring Email Servers
  - Reconfiguring Fax Servers
  - Reconfiguring File Servers
- Managing Output Devices:
  - Reconfiguring Printers
  - Modifying a Group-Server Association
  - Removing Output Devices and Groups
- Managing Requests:
  - Checking a Request Status
  - Viewing Requests
  - Canceling a Request
  - Resubmitting a Fulfillment Request

Getting Started

The steps involving the Fulfillment process include:

1. Logging In
1. Creating a template
2. Creating a query

3. Creating a datasource file (if using merged data)
4. Uploading a Master Document
5. Associating a Master Document to templates
6. Sending out fulfillments

Note: Click any highlighted column link in any tab to display the information in the opposite order.

Logging in as the Fulfillment Administrator

Prerequisites

You must have created a fulfillment administrator user.

Steps

1. To open the jtflogin.jsp page, enter its URL:

   http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp

2. Enter your user ID and password in the appropriate fields.
3. Use the following for the variable parameters:
   - host.domain_name: The hostname where the Apache Server is installed. For example, apo23sum.us.oracle.com is a fully qualified host name.
   - port: The port on which the Apache Web listener is configured.
   - docroot: The directory defined for the Apache Server that contains the jsp pages.

   Once you log in to Fulfillment, the Fulfillment Administrator home page is the default page.

4. Use the Fulfillment Administration windows to perform various functions.

The following table describes the tabs found in the Fulfillment interface.

Fulfillment Tab Descriptions

Tab	Description
Home	Use this tab to access the Fulfillment Administrator home page. Use this window to access servers, groups, templates and queries. Additionally, use the Fulfillment Administrator Status windows to view history and status of requests.
Server	Use this tab to create and modify server information, associate groups to servers as well as add and remove agents from those groups. You can also add and remove additional email servers to an existing server from this tab.
Group	Use this tab to create and modify groups, add agents to groups, and remove agents from groups. You can also change the server associated to the group.
Template	Use this tab to view, create and modify a template. You can also associate a Master Document or collateral to a template.
Query	Use this tab to generate and populate data in Master Documents dynamically. In order to create a query, the administrator must have thorough knowledge of SQL*Plus and must identify the bind variables that are needed for the query.
Status	Use this tab to re-submit a Fulfillment request or view the history of a request or the status of requests. The Status tab can also be used to view preview requests as well as to submit preview requests.

See Also

Setting Up a Fulfillment Administrative User

Using the Quick Find Search Feature

Perform the following steps to use the Quick Find search feature in Fulfillment.

Prerequisites

None

Steps

1. Using the Quick Find drop-down list, select search criteria:
   - jtffmserver
   - jtffmgroup

- jtffmquery
- jtffmtemplate
- jtffmstatus

2. Enter a keyword for the search.

   For example, if you are searching jtffmgroups, enter the group name. To search for all groups, enter a wildcard.

3. Click **Go**.
4. Click any item to display the details.

Viewing or Updating Listed Items

To view more detail or make changes to an item listed on the selected window, choose the item to open a detailed configuration window by clicking on the items.

Previewing and Printing a Previewed Fulfillment Request

Perform the following steps to preview and print a Fulfillment request.

Prerequisites

You must have submitted a fulfillment preview request.

Steps To Preview

1. Log into the Fulfillment Administrator Console.

   The Fulfillment Welcome window opens.

2. Select the **Status** tab.
3. In the View field, use the drop down list to select **Preview**.

   The Request Status window opens with the list of pending Fulfillment Preview Requests.

4. Click the selected hyperlink.

   The View Status window displays information including Request Status, Server Name, Agent, and Submit Time.

5. Click the selected Document Name hyperlink.

The document opens in your browser. Viewing is limited by MIME type. If you do not have the correct type, you are prompted to save it to disk.

Steps To Print

1. Select the Print icon (or select **File > Print**) to print the previewed HTML document.
2. Click either the **Send Preview** or the **Remove Preview** button on the View Status window to send or delete the previewed request.

Updating a Fulfillment Template

For each template, you can change the Name, Status, and Description. Perform the following steps to update a template.

Note: Changing the name of a template that is already in use may render that template inaccessible.

Prerequisites

A template must first exist.

Steps

1. Select the Template tab.

   The Template window opens.
2. (Optional) Use the list of values (LOV) to organize existing templates in three different views (all templates, active templates, or inactive templates).
3. In the Template window, choose the name of the template that you want to edit.

   The View Template window opens.
4. Edit the information as necessary. You cannot edit the name of the template.
5. (Optional) If you make an error, click **Restore** to revert back to the original information.
6. Click **Update**.

Changing a Template's Availability

If you want to prevent a template from being used for Fulfillment requests, then change the template's status. For example, you can change an inactive template to active if you want it to be available or change an active template to inactive. Perform the following steps to change the status of a template.

Prerequisites

A template must exist.

Steps

1. Select the Template tab.
2. In the Template Name column, click the template that you want to change.

   The View Template window opens.
3. In the Status drop-down list, choose the appropriate Status: **Active** or **Inactive**.
4. Click **Update**.

Creating a Query

A query is an SQL statement that directs the Fulfillment engine to collect specific kinds of data from the database when fulfilling a request. Perform the following steps to create a query.

Prerequisites

- You must identify the bind variables.
- You must identify the fields (columns and aliases) you want to associate with the query.
- You must identify which Master Document will be associated with the query.

Steps

1. Select the Query tab and click **Create**.

   The Create Query window opens.
2. Enter a unique name for the new query in the Name field.
3. Enter a description for the new query in the Description field.

4. Enter the SQL query string in the Query String field.

   See the SQL Query Guidelines following for details on creating a query.

5. Click **Create**.

   The Queries window opens and the newly created query displays in the Queries list.

See Also

Updating a Query

SQL Query Guidelines

WARNING: SQL statements typically end with a semicolon (;). However, in this case, the query engine appends the semicolon itself. Do NOT append a semicolon to the end of this query.

Use the following syntax when creating an SQL query:

```
SELECT <column name> <alias>,
       <column name> <alias>,
       <column name> <alias>,
       <column name> <alias>
FROM <table name>
WHERE <column name> = :<bind variable>
```

In the above code:

- Standard SQL commands are all in capital letters.
- Column names contain underscores.
- Column name aliases follow the column names and appear before the comma or the next keyword. Use aliases as substitutes in Master Documents for the actual column names. Alias are not required, but can be helpful.
- The table from which the columns are selected follows the FROM keyword.
- The bind variable specifies which row is pulled from the table to give the actual bits of data for each merged document. A colon in front of a bind variable makes it a global variable. This enables the query to recognize it after the value is passed in from the user interface.

For example:

```
SELECT person_last_name lname,
       party_id CustNumb,
       creation_date cdate,
       phone_number phone
FROM jtf_contact_points_v
WHERE person_first_name = :fname;
```

If you enter the above sample query as the query string, then the data source utility pulls the aliases rather than the column names when it creates the data source file.

The window opened by the data source utility would then show the following in a plain background window with nothing else:

```
lname    CustNumb    cdate    phone
```

Merge fields should match exactly with the Master Document.

Creating a Datasource File

A Datasource file is a text file that contains tab-separated merge fields that have been obtained by a query. Use the datasource file to obtain the columns available from the query so that they can be used as merged fields. Perform the following steps to create a datasource file. This can be helpful when creating Master Documents.

Prerequisites

The query for the Datasource file must already exist. See Creating a Query.

Steps

1. Select the Query tab.
2. In the Query window, click **Datasource**.

   The Create Datasource File for Query window opens.
3. From the Query Name drop-down list, choose the query. For example, select the Query that was just created.
4. Click **Create**.

   The Create Datasource window opens.
5. Right-click the **Datasource** link.

The Datasource appears in a separate browser window.

Downloading a Datasource File

Before a datasource file can be used in a Master Document, you must download it. Perform the following steps to download a datasource file.

Prerequisites

You must have already created the Datasource file. See Creating a Datasource File.

Steps

1. From the browser File menu, select **Save As**.
2. Choose text file (.txt) as the file type.
3. Navigate to the desired save location.
4. Click **Save**.
5. Close the browser window.

Updating a Query

Perform the following steps to change the parameters or other specifications of a query.

Prerequisites

You must have already created the query. See Creating a Query for details.

Steps

1. Select the Query tab.
2. In the Query name column, click the query you want to update.

   The Update Query window opens.
3. Update the information as necessary. The Query name cannot be edited.
4. (Optional) If you make an error, click **Restore** to revert back to the original information.
5. Click **Update**.

Associating a Master Document to a Template

Note: If the Master Document in HTML was originally created in Microsoft Word, you must use the Notepad or an HTML text editor to remove information that is proprietary to Microsoft from the HTML header. See Uploading a Master Document to the Marketing Encyclopedia System.

A template is a pre-defined package of brochures, newsletters, or other customer-oriented information that an agent locates and directs to customers in answer to a fulfillment request. Use the following procedure to associate one or more Master Documents to a template.

Prerequisites

- A template must exist.
- One or more Master Documents must be available in the list of Master Documents.

Steps

1. Select the Template tab.

   The Templates window opens.

2. In the Template Name column, click the template that you want to associate to a Master Document.

   The View Template window opens.

3. Click **Master Document** in the left frame.

   The View Template, Master Documents window opens.

4. Choose **Go** to begin a search of Master Documents.

   The Master Document window opens.

5. Enter the initial letter of a Master Document with % and click **Search**.
6. Click the name of the Master Document.

   The View Template window opens and the selected Master Document is now associated with the Template.

7. Click **Update**.

Removing a Master Document from a Template

Perform the following steps to remove a Master Document from a template.

Prerequisites

A template must exist and have a Master Document associated with it.

Steps

1. Select the Template tab.
2. In the Template Name column, click the template that is associated with the Master Document.
3. Click **Master Document** in the left frame.
4. Select the **Remove** check box beside the master template that you want to remove.
5. Click **Update**.

   The Master Document is no longer associated with the template.

Removing Collateral from a Template

Perform the following steps to remove collateral from a template.

Prerequisites

A template must exist and have collateral associated with it.

Steps

1. Select the Template tab.
2. In the Template Name column, click the template that is associated with the Master Document.
3. Click **Collateral** in the left frame.
4. Select the **Remove** check box beside the collateral that you want to remove.
5. Click **Update**.

   The collateral is no longer associated with the template.

Uploading a Master Document to the Marketing Encyclopedia System

After Creating a Master Document, upload the Master Document to the Marketing Encyclopedia System (MES) where it will be available for fulfillment requests.

Perform the following steps to upload a Master Document to the MES.

Prerequisites

- The Master Document must be an HTML file or an Adobe Acrobat PDF file.
- In HTML files, remove from the HTML code any propriety information inserted by the word processor, otherwise the server will not process the document. For example, saving a Microsoft Word document as HTML inserts Microsoft proprietary information in the `<HTML>` header tag, that is, a line in the header stating

  ```
  <META NAME ="Generator" CONTENT="Microsoft Word 97>
  ```

To remove such propriety information, use a generic text editor such as Microsoft Notepad or Wordpad.

> **Note:** If a Master Document requires information that must be pulled from a database table, then create an appropriate query to associate with a Master Document. Otherwise, the correct data cannot be sent with the fulfillment request.

Steps

1. Select the Template tab and click **Master Document**.

   The Master Document window opens.
2. Click **Upload**.
3. Enter the file name or click **Browse**.

   The File Upload dialog box opens.
4. Choose the Master Document file and click **Upload**.

   The Update Master Document window opens.
5. (Optional) In the **Description** field, type a description of the Master Document.
6. (Optional) From the Query drop-down list, choose a query to associate with the Master Document.

7. Click **Upload**.

   The Master Document uploads to MES.

See Also

- Creating a Query
- Updating a Query
- Associating a Master Document with a Template

Creating New Groups

To create a new group, perform the following procedure.

Prerequisites

None

Steps

1. Select the Group tab and click **Create**.

   The Create Group window opens.

2. Enter a unique name for the Group in the Group Name Field.
3. Enter a description for the group in the Description field.
4. Use the drop-down list to select the server where you want to add the group.

   You also must make the association of a group to a server in the Server tab.

5. To add agents, click **Go** and select the agent to add to the group.
6. Click **Create**.

   The new group is added to the list in the groups window.

Adding a New Group to the Server

Perform the following steps to add a newly created group to a Fulfillment server.

Prerequisites

A group must already exist in the system.

Steps

1. Select the Server tab.
2. In the Server Name column, click the server where you want to add the group.

   The General window opens.
3. Click **Groups** in the left frame.

   The Groups window opens.
4. Select **Add Group**.

   The Select Group window opens.
5. From the drop-down list, choose the group to add to the Fulfillment server.
6. Select **Go**.

   The Add Group window opens.
7. In the Output Devices tables, select the output devices to associate with this agent group. The output devices should be in a physical location accessible to the agents.
8. To make output devices available, click **Create**.
9. Click **Save** when you are finished adding output devices.

Adding Agents to a Group

Perform the following steps to add agents to a group.

Prerequisites

None

Steps

1. Select the Group tab.
2. In the Group Name column, click the name of the group to which you want to add agents.

   The Group Detail window opens.
3. In the Agents table, click **Go**.

   The Select Agents window opens.

4. Select an agent from the list or enter % and an agent's name and click **Search**.

   The Group Detail window opens and the new agent is listed in the Agents table.

5. Click **Update**.

6. Repeat these steps to add additional agents to a group.

See Also

- Removing Agents from a Group
- Creating New Groups
- Modifying Groups
- Modifying a Group-Device Association

Removing Agents from a Group

Perform the following steps to remove agents from a group.

Prerequisites

None

Steps

1. Choose the Group tab.

   The Groups window opens.

2. In the Group Name column, click the name of the group to which you want to remove an agent.

   The Group Detail window opens.

3. In the Agents table, select the check box beside the Agent's name you want to remove.

4. Click **Update**.

   The agent is removed from the group.

Modifying Groups

Perform the following steps to modify a group.

Prerequisites

None

Steps

1. Select the Group tab.

   The Group Details window opens.

2. In the Group Name column, click the name of the group that you want to modify.

   The group details window opens.

3. Edit the following information as necessary:

   - Description
   - Server names
   - Agent Information

4. Click **Update** to save the information to the database.

   The View Groups window opens.

See Also

Modifying Fulfillment Servers

Modifying Fulfillment Servers

Perform the following steps to modify a fulfillment server.

Prerequisites

None

Steps

1. Select the Server tab.

2. In the Server Name column, click the name of the server that you want to modify.

   The General window opens.

3. Edit the following information as necessary:

- Start Time
- Shutdown Time
- Request Queue Name
- Response Queue Name
- Description

4. Click **Continue**.

   The Email Servers window opens.

5. Click **Update** to save the new configuration.

See Also

- Reconfiguring Email Servers
- Reconfiguring File Servers

Reconfiguring Email Servers

Perform the following steps to reconfigure an email server.

> **Note:** You can have only one email server associated with a Group.

Prerequisites

None

Steps

1. Select the **Server** tab.

2. In the Server Name column, click the name of the server that you want to reconfigure.

   The General window opens.

3. Click **Email Servers** in the left frame.

   The Create Email Server window opens.

4. Edit the following information as necessary:

   - Physical Name

- Incoming Server
- Outgoing Server

5. To add a new email server, click **Add Email Server**.
6. Click the **Output ID** link to edit the email server details in the Create Email Server window.
   a. Enter the Email Server Name
   b. Enter the Return Address
   c. Enter the Incoming Server
   d. Enter the Outgoing Server
7. Click **Save**.
8. Click **Update**.

Reconfiguring Fax Servers

WARNING: Windows relating to fax functionality or capability are not supported at this time, and should not be used.

Reconfiguring File Servers

WARNING: Windows relating to file server functionality or capability are not supported at this time, and should not be used.

Reconfiguring Printers

WARNING: Windows relating to either print functionality or capability are not supported at this time, and should not be used.

Modifying a Group-Server Association

Perform the following steps to remove an association between a device server and a group.

Prerequisites

An association between a group and a device server must exist.

Steps

1. Select the Server tab.
2. In the Server Name column, click on the server to which the group is associated.

   The General window opens.
3. Click the **Groups** link in the left frame.
4. The Groups window opens with a list of the groups associated to the Fulfillment server with the device servers to which each group is associated.
5. Select the **Remove** check box beside the group to remove.
6. Click **Update** to complete the process.

Removing Output Devices and Groups

Perform the following steps to remove an output device or agent group.

Prerequisites

None

Steps

1. Select the Server tab.
2. In the Server Name column, click the server you want to remove.

   The General window opens.
3. Click the **Groups** link in the left frame.

   The Groups window opens.
4. Select the **Remove** check box next to the group you want to delete.
5. Click **Update**.

   The group is removed from the server.

Checking a Request Status

Perform the following steps to check the status of a request.

Prerequisites

None

Steps

1. Select the Status tab.
2. In the Request Identifier column, click the number of the request for which you want to see the status.

   The View Status window opens detailing the status of the request.

Viewing Requests

Perform the following steps to view a request.

Prerequisites

None

Steps

1. Select the Status tab.
2. Using the drop-down list, to select the view:
   - Submitted
   - Re-submitted
   - In Process

   The information appears in the status window.

Cancelling a Request

When you submit a Fulfillment request, the request goes into a queue for processing. When the server begins to process the request, it extracts the request from the queue.

Note: Once the server extracts the request from the queue, the request cannot be cancelled.

To cancel a fulfillment request in the Administrative Console, choose the Status tab, and then in the appropriate request Action column choose **Cancel**.

Re-submitting a Fulfillment Request

Perform the following steps to resubmit a Fulfillment request.

Note: You can only resubmit a failed request.

Prerequisites

You must have already created the Fulfillment request.

Steps

1. Select the Status tab and click **History**.
2. In the row that contains the request identifier that you want to resubmit, click **Re-submit**.

Understanding Escalation Management

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 relationships to other Oracle or third-party applications. This section covers the following topics:

Escalation Management Overview

A company, using Escalation Management, can reprioritize, reassign, and monitor a situation to a satisfactory completion.

There are two types of escalations:

1. Reactive
2. Proactive

Each are discussed in the subsequent sections. Escalation Manager is the "reactive" end of Escalation Management. The Business Rule Monitor (BRM) is the "proactive" escalation process.

So what can be escalated?

- A task
- A service request
- A defect

The following sections describe what an escalation is.

- What is an Escalation?
- What is a Reactive Escalation?
- What is a Proactive Escalation?
- What Are Some of the Features of an Escalation?

What is an Escalation?

An escalation is a process used to highlight or flag certain issues within an organization, so that the appropriate personnel can react to these situations and monitor the resolutions.

The following table describes a potential situation.

The Difference Between Proactive and Reactive Escalation

Proactive	Reactive
Something has happened. A service request has been reassigned three times and is still open.	**Something has happened.** A service request has been reassigned three times and is still open.

The Difference Between Proactive and Reactive Escalation

Proactive	Reactive
Something didn't happen. A high priority task is not being updated.	**Something didn't happen**. A high priority task is not being updated.
It hasn't caused a problem **yet**.	The customer calls and there **is a problem**.

Escalations occur in support centers for a wide variety of reasons. An escalation management system allows an organization to identify, track, monitor, and manage situations that require increased awareness and swift action.

What is a Reactive Escalation?

In a reactive escalation, something has happened or did not happen and the customer complained. Necessary action must be taken in response to the situation. For example, Business World, a customer of Vision Corporation, complains that a hardware problem reported one week ago is still not fully repaired. Vision Corporation must assign different resources to handle this hardware problem immediately. Manually assigning escalation resources can be done through the Escalation Manager. A reactive escalation is in response to a customer complaint.

What is a Proactive Escalation?

In a proactive escalation, again something has happened or did not happen and necessary action is taken to take care of it before the customer complains. For example, Vision Corporation wants to enforce the rule that any open task must be closed within five business days. If it has been four days since the task is opened, then the owner of this task must send an e-mail to the assignee as a reminder and also check if any assistance is needed. The Business Rule Monitor (BRM) is used to raise awareness. It provides a centralized place to define and also monitor business rules on a regular basis.

Proactive escalation is used not just in response to problems but can be set up as a follow-up action. Continuing with the same example, Vision Corporation can set up the business rule that seven days after closing a service request, it will follow up with an e-mail to verify that their customer is satisfied.

Note: A proactive escalation is usually initiated by the Business Rule Monitor (BRM) system based on business rules. Therefore, it is considered an automated escalation. A reactive escalation is primarily initiated by a person due to customer’s needs. Therefore, it is considered a manual escalation.

Escalation Features

The following are some features of Escalation Management:

- Escalation situation tracking information
- Service Request, Task, and Defect linking capability
- Ownership assignment
- Resolution plan definition with associated tasks and notes
- Automatic notification of escalation progress to identified contacts
- De-escalation and closure

Basic information is captured in an escalation document including the requester, the required resolution date, and additional contacts that are involved.

An escalation is managed by creating an escalation document, assigning an escalation owner, defining the actions needed to resolve the escalation, and communicating the progress. Once a situation is de-escalated, the escalation closure note is captured and a final communication is sent to the contacts involved.

What’s New in This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for the Escalation Management:

Escalation of a Document Whose Owner Is a Group

Formerly, automated escalation assumed that the document it was escalating was owned by a resource of type "Employee Resource." However other types of resources can own documents that are escalated.

Note: One of the business rules that the Escalation Manager form and Escalation public API enforce is that the escalation owner **must** be of type 'Employee Resource'.

Terms and Definitions

The following table describes Escalation terms and definitions.

Escalation Terms and Definitions

Term	Description
BRM module	The Business Rule Monitor (BRM) provides a User Interface (UI) and functionality that an organization can use to proactively manage escalations. It consists of two components: Business Rule Monitor Business Rule Workbench
Business Rule Monitor	It is the engine that monitors documents over time against the user-defined business rules.
Business Rule Workbench	It is used to define a business rule.
Customer Relationship Escalation	A customer relationship escalation is an escalation document that escalates multiple support requests, defects, or tasks.
Defect	A defect is a document that tracks product problems and resolutions. A defect can be escalated without an associated service request. It is escalated in the HTML-based application Oracle Quality Online (OQO), formerly known as the Defect Management System.
Escalation	To escalate something, such as a process means to increase in extent or intensity.
Escalation Plan	An escalation plan is a series of follow up tasks that are attached to the escalation document.
Escalation Territory	An escalation territory is a territory that provides the resources responsible for managing an escalation.
Reference Document	A reference document is a document that is linked to an escalation document. For example, a service request (number 9229) is escalated to Jane Doe in escalation document (number 11749), This service request (number 9229) is a reference document.
Reference Type	A reference type specifies whether a reference document is escalated or used to provide additional information.
Service Request	A service request is a document that tracks information about a customer’s product and service problems.
Workflow	Workflow defines what actions occur if a business rule is violated.

Escalation Terms and Definitions

Term	Description
Workflow Attributes	Set the variable parameters. They control the behavior of the workflow.
Workflow Monitor	A Java based tool used for administering and viewing workflow process.

Reactive Escalation: The Escalation Manager

The following topics are described in this section.

- What is the Escalation Manager?
- Explanation of Escalation Manager Components
- Workflow Notifications
- Escalation Territories
- Escalation Manager Process Flow

What is the Escalation Manager?

You can manage situations that require awareness and possible actions using the Escalation Manager user interface (UI). An escalation can be managed by creating an escalation document, assigning an escalation owner, and defining the actions needed to resolve the escalation.

In the Escalation Manager you can:

- Set the level of the escalation
- Assign the escalation owner
- Link to relevant documents
- List relevant contacts
- Create notes and tasks

Explanation of Escalation Manager Components

The following table describes the different components available in the Escalation window.

Escalation Window

Field	Type	Description
Customer	List of values (LOV)	Use the LOV to select the customer name.
Account	LOV	Use the LOV to select the customer account.
Location	LOV	Use the LOV to select the customer location.
Number	Field	A number is unique and assigned to the escalation.
Status	LOV	A status describes the state of the escalation: Closed Open Working
Reason	LOV	A reason describes why an escalation occurred.
Date Opened	Field	The current date is the default of when the escalation was opened.
Date Closed	Field	Use the LOV to select a date when closing the escalation.
Target Date	Field	Use the LOV to select a date when the escalation should be resolved.
Level	LOV	Level describes the severity of the escalation. Some seeded values include: De-Escalated Level 1 Level 2 Never Escalated
Escalation Territory	Field.	The field automatically populates only when an owner is assigned to the document through the Assignment Manager and if the escalated source document is assigned to a resource defined in a territory.
Owner	LOV	Use the LOV to select the owner.
Assign	Button	Select the button to open Assignment Manager.
Escalation Summary	Text Field	Use the text field to summarize the situation.

Escalation Window

Field	Type	Description
Reference Documents	Tab	Use this tab to reference the type, document, number and details of other relevant documents if it is not populated automatically.
Contacts	Tab	Use this tab to enter contact information (employee or customer) and how the contacts are to be alerted. This tab is also used to identify the requester.
Audit	Tab	Use this tab to view all the changes that have been made to an escalation document. Each update to it is recorded here after every save.
Notes	Button	Click this button to open the Notes module. You must first save your work.
Task	Button	Click this button to open the Task Manager. You must first save your work.
Save	Button	Click this button to save your work.
Cancel	Button	Click this button to cancel the escalation.

Workflow Notifications

Notifications are an integral part of the Escalation functionality. Oracle Workflow is used to process and deliver the notifications regarding the escalation activity.

Notifications are sent for the following reasons:

- Escalation creation
- Escalation status changes
- Escalation owner assignment changes
- Escalation level changes
- Escalation target date changes

Notifications are sent to those people (employees or customers) that are identified on the Contacts tab, and for which the Notify Check Box is selected.

Typical recipients include:

- Owner of the object (Service Request, Task, or Defect) that is being escalated
- Human Resource (HR) manager of the owner of the Escalation document

- Owner of the Escalation document

Escalation Territories

Ensure that you have a resource assigned to an Escalation territory. The Escalation territory can be a catch all for all escalations.

See Also

View the following topics in Territory Manager for additional information:

- Viewing Escalation Territories

Escalation Manager Process Flow

The following table describes the order and process of implementing and using the Escalation Manager.

Escalation Manager Process

Step	Description	Required	Performed By
Set Profile Options	You can identify and set the specific profile options and the corresponding values.	Yes	Implementor
Start the Background Workflow	Notifications are generated to the designated contact when the escalation is created and the owner, escalation level, target date, or status is changed.	Yes	Implementor
Define a New Customized Escalation Status	Escalation statuses are used to define the state of the escalation document.	Optional	Implementor
Define New Escalation Reference Types	Use reference types to determine if a document is going to be escalated. Examples are open, closed or working.	Optional	Implementor
Define New Escalation Reason Codes	Escalation reasons are used to specify why a source document is escalated.	Optional	Implementor
Define the New Escalation Contact Types	Escalation contact types are used to classify the category for contacts. For example, contacts can be employees or customers.	Optional	Implementor
Define the Escalation Level	Use escalation levels to specify the levels of escalation severity.	Optional	Implementor

Escalation Manager Process

Step	Description	Required	Performed By
Manage a Service Request	A service request is a document that tracks information regarding a customer's product and service problems.	Yes	All Users
Manage a Task Escalation	A task is a document that tracks work to be done by a support center.	Yes	All Users
Manage a Defect Escalation	A defect is a document which tracks product problems and resolutions. This is escalated through Oracle Quality Online.	Yes	All Users
Add a Note to an Escalation Document	Notes allow additional information to be attached with the escalation document.	Optional	All Users
Add a Task to an Escalation Document	Use an attached task to document any follow-up activity or possible resolution for the escalation.	Optional	All Users
Changing an Escalation Status	Manually changing an escalation status generates a notification to the designated contacts.	Yes	All Users

Proactive Escalation: The Business Rule Monitor

The following topics are described in this section.

- What is a Business Rule?
- What is the Business Rule Monitor?

What is a Business Rule?

A business rule is a user-defined condition. When the condition is not met, the rule triggers a workflow process. The process is enforced by the business rule owner.

A business rule can be as simple as "A service request cannot be left open for more than two days." This rule can be defined according to an organization's needs or an agreement between its customers.

For example, if Vision Corporation, a service organization, is eager to provide efficient customer service, then the Service Department Director for Vision Corporation, would define a business rule based on the company's goal. This rule can be that if a task with a high priority has been open for four hours, then the task owner should be notified to proactively manage potential issues. This is effective immediately. The director is the owner of this business rule as he is responsible for any future updates and necessary confirmation.

More examples of business rules are:

- A service request is assigned within half an hour. Otherwise, the owner of this request receives a warning notification.
- A task with a high priority is closed within two days. Otherwise, a manager investigates why it cannot be done within that time frame.
- An open defect is closed within three business days. Otherwise the assignee should meet with her manager one day prior to the due date to discuss possible solutions to this defect.

What is the Business Rule Monitor?

The Business Rule Monitor (BRM) provides a User Interface (UI) and functionality that an organization uses to proactively manage escalations. It consists of two components:

- **Business Rule Workbench**: used to define a business rule.
- **Business Rule Monitor**: the engine that monitors documents over time against the user-defined business rules.

The BRM module integrates with Oracle Workflow to provide possible action taken if the condition defined in the rules is not met.

> **Note:** The functionality of BRM is not limited to only detect potential problems. It can also be used as a reminder of positive reinforcement, such as to remind employees of a company's annual events or employees' birthdays.

Workflow and Workflow Attributes

When defining your rules, you must also specify the workflow information for possible actions once the rule is violated. There are four seeded workflow processes:

- Notification Only
- Create a Task Only
- Notification and Create Task
- Escalated Object

Notification Only

An Oracle Workflow notification is sent. The person who receives this notification selects from the Value field in the Workflow Attributes window. Click the "..." button to display this attributes window.

Create a Task Only

An automated escalation task is created. This is generated through the seeded Automated Escalation Template Group for Task Manager (Service Request or Defect Management.) The owner and assignee of this task select from the Value field in the Workflow Attributes window.

Notification and Create Task

Besides the workflow notifications that are sent, an automated escalation task is also created. The owner and assignee of this task are specified in the Value field.

Escalated Object

An escalated document is created. The owner of this escalated document can be specified in the Value field. The selection in the Value field can be a document owner, the document owner's Human Resource manager, an escalation territory primary contact, or the business rule owner. If this value is not specified, it defaults to the business owner.

Note: The selection in the Value field can be document owner, document owner's HR manager, escalation territory primary contact, and business (rule) owner. If this value is not specified, it defaults to the business owner.

If the unassigned option is selected in the Automated Escalation Notification Task Assignee Role field in the Workflow Attributes window, then the task that is created has no assignee, but it has an owner specified because you cannot find the unassigned option from the List of Values in the task owner role field.

Workflow Attributes

In addition to the Workflows which give standard escalation activities, each of the seeded Workflow processes has its own Workflow attributes, which can be accessed in the Business Rule Workbench window. The value chosen for each attribute is saved as part of the Business Rule and allows you to control the behavior of the escalation activity for that rule.

Workflow attributes in the Business Rule Monitor seeded workflows are specific to the workflow process. The following table lists each seeded workflow process, the attributes it has, the meaning of that attribute, and possible values. Attributes are the same regardless of whether the Workflow is for a task, defect, or service request.

Workflow Attributed Defined

Workflow Name	Attribute	Meaning	Possible Values
Send Notification	Automated Escalation Notification Role	Send the notification to the person who fulfills the role indicated by the value selected	Business Owner Document Owner Document Owner's HR Manager Escalation Territory Primary Contact
Create Task	Automated Escalation Notification Task Assignee Role	Assign the task to the person who fulfills the role indicated by the value selected	Business Owner Document Owner Document Owner's HR Manager Escalation Territory Primary Contact Unassigned
Create Task	Automated Escalation Notification Task Owner Role	The task owned by the person who fulfills the role indicated by the value selected	Business Owner Document Owner Document Owner's HR Manager Escalation Territory Primary Contact
Create Task	Automated Escalation Task Template	The template that is used to create the task	Automated Escalation Template Group for task, defect, or service request
Send Notification and Create Task	Automated Escalation Notification Role	Send the notification to the person who fulfills the role indicated by the value selected	Business Owner Document Owner Document Owner's HR Manager Escalation Territory Primary Contact

Workflow Attributed Defined

Workflow Name	Attribute	Meaning	Possible Values
Send Notification and Create Task	Automated Escalation Notification Task Assignee Role	Assign the task to the person who fulfills the role indicated by the value selected	Business Owner Document Owner Document Owner's HR Manager Escalation Territory Primary Contact Unassigned
Send Notification and Create Task	Automated Escalation Notification Task Owner Role	The task owned by the person who fulfills the role indicated by the value selected	Business Owner Document Owner Document Owner's HR Manager Escalation Territory Primary Contact
Send Notification and Create Task	Automated Escalation Task Template	The template that is used to create the task	Automated Escalation Template Group for task, defect, or service request
Escalate Object	Automated Escalation Document Owner Role	The escalation document owned by the person who fulfills the role indicated by the value selected	Business Owner Document Owner Document Owner's HR Manager Escalation Territory Primary Contact

Resource Types

A document owner can be of any resource type other than an employee resource. Some examples of other types of document owners are: parties or partners and supplier contacts. Since the automated escalation can happen to the document owner of any resource type, the person who will receive the notifications is determined as follows:

Document Owner

The Document Owner is selected as the value in the workflow attributes.

- If the document owner type is Employee Resource, then the document owner will receive notifications.
- If the document owner resource is of any other type, then the primary contact with the employee resource type in the escalation territory is used. If there is no resource that satisfies this criteria, then the primary contact with the employee

resource type in the catch-all territory is used. Again, if there is no resource that satisfies this criteria, then the Business Rule Owner is used because the business rule owner is guaranteed to be a resource of type Employee Resource.

Document Owner's HR Manager

The Document Owner's HR Manager is selected as the value.

- If the document owner type is Employee Resource, then the notification is sent to the HR manager of that resource. If there is no resource that satisfies this criteria, then the primary contact with the employee resource type in the escalation territory is used. Otherwise, the primary contact with the employee resource type in the catch-all territory is used, and then the Business Rule Owner is selected.
- If the document owner resource is of type Group Resource, then the notification is sent to the first resource of type Employee Resource within the resource group who has a manager. If there is no resource that satisfies this criteria, then the primary contact with the employee resource type in the escalation territory is used. Otherwise, the notification is sent to the primary contact with the employee resource type in the catch-all territory, and then the Business Rule Owner.
- If the document owner resource is of any other type other than employee or group resources, then the same rule is used: the primary contact with the employee resource type in the escalation territory, then the primary contact with the employee resource type in the catch-all territory, and then the Business Rule Owner.

Escalation Territory Primary Contact

The Escalation Territory Primary Contact is selected as the value.

- The notification is sent to the primary contact with employee resource in the escalation territory.
- If there is no resource that satisfies this criteria, then the notification is sent to the primary contact with employee resource in the catch-all territory. Otherwise, the Business Rule Owner receives the notification.

Explanation of Business Rule Monitor Components

The following table describes the different components available in the Business Rule Workbench Window.

Business Rule Workbench Window

Field	Type	Description
Name	Field	Define the name of a rule.
Object	Drop down list of values (LOV)	An object is what the rule relates to such as, Task, Service Request, or Defect.
Description	Field	Describe the business rule you want to enforce.
Owner	LOV	Select a business rule owner.
Effective	Fields	Enter range of dates when the business rule is operational. Leave this field empty until the time you are ready to enable the business rule.
Check Rule Every	Field	Enter a period of time which the rule will be checked.
Tolerate Condition For	Field	Enter a period of time which you can tolerate the condition before acting upon it.
Workflow	LOV	Select workflow process for the business rule.
...	Button	The Workflow Attribute button allows for the selection of resource (owner.)
Simple	Tab	Enter SQL code using "prompts" or use the Complex tab.
Complex	Tab	Use this tab to enter SQL code directly instead of using the Simple tab.
Show SQL	Button	This button displays the SQL code in the Complex tab.
Validate	Button	This button validates if the SQL code is syntactically correct.
Generate	Button	This button generates the business rule.

The following table describes the different components available in the Business Rule Monitor Window.

Business Rule Monitor Window

Field	Type	Description
Interval	Field	Set the polling interval.
UOM	Field	Enter a unit of measure, for example, minutes.

Business Rule Monitor Window

Field	Type	Description
Item Key	Field	The item key is a unique identifier of the main BRM process which checks all the business rules.
Status	Field	The status displays the current state of the BRM process, such as, active, stopping, or complete.
Refresh Status	Button	Clicking this button refreshes to the current status of the rule.
Workflow Monitor	Button	Click this button to start the workflow monitor tool.
Stop	Button	Click this button to stop the main BRM process.
Cancel	Button	Click this button to exit the window.
Save	Button	Click this button to save the interval and UOM entered.

Business Rule Monitor Process Flow

Use the Business Rule Monitor to check the active business rules. This sets up an Oracle Workflow process which continuously loops and checks at a specified interval for all defined business rules.

The following table describes the order and process of implementing, using, and administering the Business Rule Monitor.

Business Rule Monitor Process

Step	Description	Required	Performed By
Define the owner of the workflow process.	The owner of the workflow process is assigned to an existing user. This is typically the system administrator or the workflow administrator.	Yes	Implementor, System or BRM Administrator
Set the Business Rule Monitor system profile option.	The option is Business Rule Monitor Workflow Administrator.	Yes	Implementor, System or BRM Administrator
Start the background Business Rule Monitor workflow processes.	These attributes are maintained within the Business Rule Workbench and ensure proper operation of the BRM.	Yes	Implementor, System or BRM Administrator
Start the Business Rule Monitor.	Once the Business Rule Monitor is started, there is no need to start it again, even after defining new business rules.	Yes	Implementor, System or BRM Administrator

Business Rule Monitor Process

Step	Description	Required	Performed By
Define new, customized, business rules	You can define new rules to reflect your business logic.	Optional	Implementor, System or BRM Administrator
Verify Escalation Territory creation.	Ensure that you have a resource assigned to an Escalation territory. The Escalation territory can be a catch all for all escalations	Yes	Implementor, System or BRM Administrator
Access the BRM	Access the workbench to define, enable, or search for a business rule.	Yes	System or BRM Administrator
Manage the BRM Monitoring Process	Define, view, or adjust the BRM process from the Business Rule Monitor control panel. This includes setting the time interval and using the Workflow Monitor to view the status of the main BRM process. Link the workflow to a business rule.	Yes	System or BRM Administrator
Access the Workbench	Access the workbench to define, search, validate, and generate a business rule.	Yes	Implementor, System or BRM Administrator
Link the Workflow to a Business Rule	This is done from the Business Rule Workbench.	Yes	Implementor, System or BRM Administrator
Create a Business Rule	When you set the conditions in SQL, you can choose to either follow prompts or directly write the code. This is done from the Business Rule Workbench.	Yes	Implementor, System or BRM Administrator
Enable a Business Rule	Enable the rule by setting the Start Date in the Workbench.	Yes	Implementor, System or BRM Administrator
Start and Stop monitoring the rules	This is done from the Business Rule Monitor control panel.	Yes	Implementor, System or BRM Administrator
View Workflow Logging Information	Use the Workflow monitor to view workflow logging information. This is a Java based tool.	Yes	Implementor, System or BRM Administrator

General Tips for Defining Rules

The following suggestions are helpful when defining rules in the BRM:

- **The condition should not reflect an absolute state**. Otherwise, the monitor will keep detecting the same objects and acting upon them; you may have repeated notifications sent.
- **Use reasonable check intervals**. The check interval also determines the notification interval. So, if you check a rule every two minutes, notifications are sent every two minutes.
- **Take loop time into consideration**. If the main scan cycle is set to run every ten minutes, then there is no point in setting the check frequency to two minutes.
- **Even in a simple rule, SQL syntax applies.** You can use SQL functions, but you also have to use quotes around your character values. Also use IS NULL and IS NOT NULL instead of =NULL and <>NULL.
- **Verify that the view does what you intended for it to do.** The simplest way to do this is to cut and paste the view definition from the Complex tab into a SQL+ session.
- **Check the performance of the view**. Do a Select from your view. If it takes a long time to return the values, then ask a SQL expert for assistance.

Using Escalation Manager

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks. See Overview for an explanation of the Escalation Manager features.

This section covers the following topics:

- Getting Started
- Navigating the Escalation Manager
- Creating Escalations
- Creating a Document Whose Owner is a Group
- Managing a Service Request Escalation
- Managing a Task Escalation
- Managing a Defect Escalation

Getting Started

Use Escalation Manager to perform the following tasks:

- Navigating the Escalation Manager
- Creating Escalations
- Managing Different Types of Escalations

Navigating the Escalation Manager

There are several ways to access the Escalation Manager. Typically, you would access the Escalation Manager through a task or service request that you want to escalate. In general, service requests, tasks, and defects can be escalated. Use Oracle Quality Online (OQO), formerly known as Defect Management System (DEMS) to create and escalate a defect.

- You can log in with a CRM Administrator responsibility, for setting up tasks. Use the forms-based Task module to escalate a task.
- You can access the Escalation Manager through a task, defect, or service request that you want to escalate.

Administrative Path

To access the administrative tasks indicated through the forms-based CRM Administrator responsibility, select **Task and Escalation Manager > Setup**.

Escalation administrative tasks are defined in the form from **Define Escalation Reason to Define Reference Type**.

General Usage Path

To do this, search for the task (or defect or service request) then use the following navigation path to invoke the Escalation Manager:

- From a stand-alone task in the forms-based Task Manager: **Tools > Manage Escalation**
- From a service request: **Tools > Request Escalation**
- From a service request: **Tools > Task Escalation**
- From the CRM Administrator responsibility: **Task and Escalation Manager > Manage Escalations**
- From a defect HTML window, select the Escalation button for defect escalation. See Oracle Quality Online documentation for details on how to escalate a defect from the application.

Creating Escalations

An escalation is initiated by a person using a service channel (telephone, web, or e-mail). An escalation can also be initiated by the system based on pre-defined rules that have been established to monitor business situations.

To initiate an escalation, you must:

- Accept a request for an escalation
- Review the situation

- Create an escalation document
- Notify the involved parties.

An escalation request can be initiated on behalf of a customer, an employee, or other involved party. Perform the following steps to create an Escalation document.

Prerequisites

A task or service requests must exist.

Steps

1. If the Escalation Manager is launched directly from a service request, task, or defect, then the customer information should be populated automatically. Otherwise, manually enter it. If you open the Escalation Manager as a stand-alone application, from the CRM Administrator responsibility, select **Task and Escalation Manager > Manage Escalations**.

   > **Note:** Status, reason, escalation level, and reference type information is set up during the implementation process.
   >
   > You must have the appropriate information entered into the Reference Documents and Contacts tab before you can assign an owner.

2. Enter the customer's name and number.
3. Select the Reference Documents tab.
   a. Enter all relevant information if it has not already been automatically populated in the Type field.
   b. Enter all relevant information if it has not already been automatically populated in the Document and Details fields.
4. Select the **Contacts** tab.
   a. Enter all contacts (customer or employee).
   b. Specify if the contact is a requester or the escalation is for notification purposes.

   Other recipients, besides the owner of the escalation document, can include the Human Resource manager of the owner of the escalation document, the owner of the escalated object, and the selected employee and customer contacts.

5. (Optional) Select the Audit tab to view all the changes once you are finished.
6. Click **Assign,** in the Escalation Owner Information region, to assign ownership.

   The Assignment Manager window opens. You can assign either automatically or manually.

   - **Automatic Assignment**

     An owner can be automatically assigned by using the Assignment Manager if the escalated source document is assigned to a resource defined in a territory and this territory has an escalation territory attached to it.

   - **Manual Assignment**

     If the document does not contain a territory, or if you want to override the recommended escalation resource by the escalation territory, then either select an owner from the List of Values or use the Assignment Manager to assist in owner selection.

See Also

Managing Different Types of Escalations

Creating a Document Whose Owner is a Group

Perform the following steps to define an owner of an escalated document whose owner is a group.

Prerequisites

A group must already exist. If it does not, then you must go to the Resource Manager to define it.

Steps

1. Navigate to **Tasks**.

   The Find Task window opens.

2. Click **New** to create a new task.

   a. Enter a name in the Name field.

   b. Enter Owner Type from the List of Values (LOVs). Choose Group Resource.

   c. Select a previously created Owner from the LOVs.

3. Save the Task.

Managing Different Types of Escalations

The following sections describe the process of managing different types of escalations:

- Managing a Service Request Escalation
- Managing a Task Escalation
- Managing a Defect Escalation

Managing a Service Request Escalation

A service request is a document that tracks information regarding a customer's product and service problems.

Perform the following steps to manage a service request escalation.

Prerequisite

A service request has been entered into the system.

Steps

1. Navigate to the **View Service Request** window and query the existing service request.
2. Verify that the service request has never been escalated. In the Request Information area of the header, verify that "Never Escalated" appears in the Escalation Level field.

   You may have to scroll down in the Request Information header region to see the Escalation Level field.
3. From the Tools menu, choose **Request Escalation.**

   The Escalations Window appears. The customer and account information fields are automatically populated, along with the reference document information (service request).
4. Select a Status.
5. Select a Reason.
6. Enter a target date.
7. Select the escalation level.

8. Assign the escalation to yourself or another existing resource using one of the two methods listed:

   Manual Assignment

   a. Select a resource from the LOV.

   Automatic Assignment

   a. Click **Assign** to choose an escalation owner from the Assignment Manager.
   b. Select the **Assisted Assignment** option and select **Territories**.
   c. Click **Search**.

      Note: Only click **Search** in the Selection Criteria region. Leave the other fields in the default settings.

      The resources from the Escalation Territory of the escalated document become visible. If there are no Escalation Territories setup, then the resources from the Catch All territory are in view.

9. Select the resource name and click **OK**.
10. Enter an escalation summary.
11. Enter the name of the customer or employee contact (requester), and select the **Requester** Check Box.

    There can be more than one contact, but only one requester.

    a. (Optional) Enter any additional contact points.
    b. (Optional) Add more reference documents to the escalation in the Reference Documents tab.

12. Save the escalation, and make a note of the displayed escalation number.

    a. (Optional) Click **Notes** to create a note about the escalation.
    b. (Optional) Click **Tasks** to create a follow up task for the escalation.

13. Close the Escalation window to return to the Service Request window.

    Re-query the service request to view the updated escalation level.

Managing a Task Escalation

Perform the following steps to manage a stand-alone task escalation.

Prerequisite

A task has been created and entered into the system.

Steps

1. Navigate to **Tasks**.
2. Find the task to be escalated.
3. From the Tools menu, choose **Manage Escalation**.

   The Escalations window appears.
4. Verify that the task has never been escalated.

   If the task has already been escalated, then the escalation document will automatically appear in the escalation window.
5. Select a Status.
6. Select a Reason.
7. Enter a target date.
8. Select the escalation level.
9. Assign the escalation to yourself or another existing resource using one of the two methods listed:

   Manual Assignment

   a. Select a resource from the LOV.

   Automatic Assignment

   a. Click **Assign** to choose an escalation owner from the Assignment Manager.
   b. Select the **Assisted Assignment** option and select **Territories**.
   c. Click **Search**.

   Note: Only click **Search** in the Selection Criteria region. Leave the other fields as defaulted.

The resources from the Escalation Territory(s) of the escalated document(s) become visible. If there are no Escalation Territories set up, then the resources from the Catch All territory display.

d. Select the resource name and click **OK**.

10. Enter an escalation summary in the Escalation Summary field.
11. Enter the name of the customer or employee contact (requester), and select the **Requester** check box.

    There can be more than one contact, but only one requester.
12. (Optional) Enter any additional contact points.
13. Save the escalation and query the escalated task to view the updated escalation level.

Managing a Defect Escalation

A defect is a document which tracks product problems and resolutions. A defect can be escalated without an associated service request. Any employee can escalate a defect from the HTML-based Oracle Quality Online (OQO) application.

See the OQO documentation for the procedures on escalating a defect.