

Oracle® Universal Work Queue

User Guide

Release 11*i*

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Oracle Universal Work Queue Implementation Guide, Release 11i

Part No. B10183-02

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If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11*i* of the *Oracle Universal Work Queue User Guide*.

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

- The principles and customary practices of your business area.
- Oracle Universal Work Queue.

If you have never used Oracle Universal Work Queue, Oracle suggests you attend one or more of the Interaction Center 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 Universal Work Queue.

- [Chapter 1, "Product Description"](#), provides overviews of the application and its components, explanations of key concepts, features, and functions.
- [Chapter 2, "User Procedures"](#), provides process-oriented, task-based procedures for using Oracle Universal Work Queue to perform essential business tasks.

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.

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 Universal Work Queue.

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 Universal Work Queue 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 Universal Work Queue.

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 Universal Work Queue (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 Universal Work Queue Implementation Guide

Use this guide to implement and administer Oracle Universal Work Queue.

Oracle Advanced Inbound Implementation Guide

Use this guide to implement inbound media for an interaction center.

Oracle Advanced Outbound Implementation Guide

Use this guide to implement outbound media for an interaction center.

Oracle Scripting Implementation Guide

Use this guide to implement Oracle Scripting.

Oracle Interaction Center Server Manager Implementation Guide

Use this guide to implement Interaction Center Server Manager.

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 11i. 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 *11i*, 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 *11i*. 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 *11i*. You cannot upgrade to Release *11i* 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 6i 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

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 CRM Application Foundation Implementation Guide

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Universal Work Queue 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 Oracle[®]8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink 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 OracleMetaLink, 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 OracleMetaLink 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.

Product Description

This chapter describes the features and architecture of Oracle Universal Work Queue. It also describes the concepts required to understand the implementation and administration tasks. The concepts also appear in the product online help.

Topics include:

- [Features](#)
- [Concepts](#)

1.1 Features

Universal Work Queue is a flexible work presentation and access framework that provides a centralized view and access to interaction center work. From the Universal Work Queue desktop, a user can access and update work items. Work that originates from a customer contact channel, such as a telephone call or an e-mail, is considered a media work item. Work which originates from an Oracle Application, such as a task or lead, is called an application work item. You can set up Universal Work Queue to handle both application and media work items, or only application work items.

See Also

- [Concepts](#)

1.1.1 Oracle Universal Work Queue Features

The features of Oracle Universal Work Queue include:

- Oracle Universal Work Queue desktop interface
- Oracle Universal Work Queue server

- Oracle Universal Work Queue application integration bean
- icWork Controller
- Prioritized work delivery
- Application notices
- Application and interaction integration
- Session information
- Administration, configuration, and diagnostics

By providing a single point of access for all agent work, Universal Work Queue minimizes the complexity of agent interactions across multiple contact channels and across Oracle Applications. Agents interact with application and media work through a consistent interface.

Universal Work Queue also provides a standard programming interface for Oracle Applications and media enablers to request, receive, and display agent work information. Work providers use this framework for the delivery and presentation of work items to agents for processing. The customer channel framework includes the support for multiple and simultaneous interactions. For example, handling an unsolicited call while processing another interaction type. Simultaneous interaction handling and processing is reliant on the framework being supported by the work provider.

Through integration with Oracle Interaction Blending, agents are moved between media queues based on service levels for the interaction center.

1.2 Concepts

Universal Work Queue is an interface for accessing, organizing and acting upon different types of work generated in an interaction center. Work that originates from an Oracle Application, such as a service request or task is called an application work item. Work that originates from a customer contact channel, such as a telephone call is called a media work item.

You can select a customer channel and request work from it; this sets you available for the next media item that is in the queue for you. You can select and open an application work item. When Oracle Universal Work Queue delivers a work item, it launches the appropriate business application form.

Concepts include:

- [Agent Workplace](#)

- [Work Selector](#)
- [Quick Filters](#)
- [Work Summary Panel](#)
- [Work Panel](#)
- [Interaction Center Work Controller - icWork](#)
- [Worklist](#)
- [Softphone Tab](#)
- [Notice Tab](#)
- [Interaction Blending](#)
- [Refresh Strategy](#)
- [Phone Extension Window](#)
- [Screen Pop](#)
- [Work Assignment](#)
- [Work Delivery](#)
- [Navigating Oracle Universal Work Queue](#)

See Also

- [Features](#)

1.2.1 Agent Workplace

The agent workplace provides a single point of access for all interaction center work. Within the workplace you may view, organize, act upon and open your work. The workplace is designed so you may quickly focus on a broad overview of your workload, a list of work item summaries or the details of individual work items. You may configure your agent workplace to display information to best suit your work style.

The agent workplace is divided functionally into five major sections: workplace configuration and work access controls, work selector, quick filters, work summary panel, and the work panel.

1.2.1.1 Workplace Configuration and Work Access Controls

The workplace provides special menu options and toolbar icons that allow you to configure the workplace and control work items selected within the workplace.

Configuration Controls Using profile options, you, your supervisor or your site administrator may determine which work item types and customer channel sources are always available. From within the workplace you may also change the work selector style (either as a tree along the left side of the workplace or as a cascading menu at the top). From the tree work selector you may:

- show or hide node counts
- show, hide or set the display order of work nodes
- refresh individual nodes or subindex

Work Access Controls Work Access Controls allow you to request work from a selected customer channel or open a selected work item. You may also request, reschedule or complete work from the Worklist. There are work access controls that quickly clear or reset the Quick Filters, to refresh work information, and to reset the current application and customer channel interaction state.

1.2.2 Work Selector

Use the Work Selector to review your workload and select a work source. The Work Selector provides an overview of your workload; it is organized into work source nodes by application work type (such as Tasks, Leads, Service Requests, etc.) and customer channel source (such as Inbound Telephone calls, Outbound Campaigns, eMail, etc.) Some nodes comprise more specific work item types such as “My Leads” or “My Teams Leads”. Most nodes are further segmented into sub-nodes by attributes, such as application work type status, age or ownership. Some nodes have several sub-node segmentation tiers.

The tree work selector displays along the left side of the Work Place. It provides a quick overview of workload and its organization. The tree selector also enables you to turn counts on and off and to control the display and order of nodes.

The cascading work selector displays as a drop down menu at the top left of the Work Place, just below the menus and toolbars. It is more compact and affords a great display area for the work summary panel. While it does not provide a complete hierarchy of all work items, it is more compact and somewhat easier to navigate.

Use the Switch Work Selector control or menu option to toggle between the tree and cascading work selector display styles. The profile option IEU: Desktop: UI: Work Selector Display Style sets the default Work Selector display style; HGRIID displays the tree work selector and CASCADE displays the cascading work selector.

1.2.3 Quick Filters

Use Quick Filters to further refine and narrow the focus of work items displayed in the work summary panel beyond the seeded work node segmentations. Not all application work item types support quick filters, and your administrator must configure your responsibility and nodes to activate quick filters.

When present, quick filter controls display across the top of the Work Place, just below the menu and toolbars and to the right of the cascading work selector. Use the drop down filter control to set the attribute filter values, then press the Quick Filter apply button at the far right of the quick filter area. Once applied, Quick Filters remain in effect for the duration of the current session or until you change them; Quick Filters revert to the default setting at the start of each session.

Administrators may set a default Quick Filter value for each quick filter attribute. Use the "Default Filter" control or Tools->Default Filter to revert to the node's default Quick Filters. Use the "Clear Filter" toolbar icon of the Tools->Clear Filter to remove the current node's filters and view all work items unfiltered.

1.2.4 Work Summary Panel

The Work Summary Panel is a table that lists and presents summary information about each work item in the current selected. (Quick Filters may further refine the work items listed.) The Work Summary Panel displays to the right of the tree work selector and below the cascading work selector and the Quick Filters selection controls.

The Work Summary Panel is always present whenever a node is selected. When Oracle Universal Work Queue starts, there is no selected node; therefore the Work Summary Panel is empty (blank). If the Work Summary Panel is empty:

1. Check to be sure you have selected the node.
2. Check the counts and make sure there is work in the selected node or sub-node.
3. Check the applied Quick Filters, some Quick Filter combinations may not include any work (for example filtering on "closed" status).

Use the Work Summary Panel to review current work items, select, open and act on one work item or select and act upon two or more work items:

- Select one work item
- Select and open a work item
- Select two or more work items

You may customize the work summary panel in the following ways:

- Hide or display attributes (columns)
- Set the order of columns in the table
- Sort the list work items on one, two or three attributes

Note: Each attribute may be independently sorted in ascending or descending order.

- Save your customized settings

Note: Saved settings last between session until you either change, save, or clear the new or customized settings.

- Clear saved customized settings

Use Quick Filters to further refine and narrow the focus of work items displayed in the work summary panel beyond the seeded work node segmentations. Not all application work item types support quick filters, and your administrator must configure your responsibility and nodes to activate quick filters.

1.2.5 Work Panel

Use the Work Panel to perform quick actions on the selected work item(s). It presents additional information in the form of special instructions, extended information, and detailed information about the work item selected in the Work Summary Panel.

When present, the Work Panel displays in the lower half of the Work Place form, beneath the tree work selector and the Work Summa Panel. Not all nodes support the work panel; some application work item types do not support the work panel and your administrator may configure nodes to access the Work Panel.

The Work Panel is divided into three areas:

- **Special Instruction Area** - this displays special instruction based on work item attributes such as "customer is in collections." The objective is to present additional information to help you better understand the work item and if and how you should act upon it.
- **Extended Information Area** - this displays additional information gathered from other sources and linked together. This provides access to large amounts of information such as notes.
- **Action Area** - this allows users to select and execute actions on the selected work item(s). It presents additional details and allows users to enter or change parameter values. The actions listed vary depending on the work item, the node configuration and the number of work items selected. The details and parameters vary depending upon the selected action, the node configuration and the number of work items selected.

1.2.6 Interaction Center Work Controller - icWork

icWork provides a "remote control" for work. It is an independent window with a small footprint that provides interaction and work control, such as the softphone, interaction control and notices. icWork can be positioned anywhere on the screen. Use the icWork menu and toolbar options to control your work state; you may request work or breaks, complete or reschedule. It provides information about current active interactions; and has a tabbed area that imbeds media controllers, such as the softphone and the notices control.

icWork is only enabled and present if you are enabled for one or more of the following:

- If any customer channel node is enabled - inbound or outbound telephony. For example, used to cancel and request queued media work and to control media items through the embedded softphone.
- If the Worklist is enabled. For example, used to request the next work item, reschedule work and complete work.
- If session tracking is enabled. For example, used to request a break.
- If application notices are enabled. For example, used to read, acknowledge, delete and navigate through notices.

1.2.7 Worklist

The Worklist provides queued access to application work items ordered by priority and scheduled start date. Each work item is assigned a standard priority. The

Worklist can combine work of all types, although not all work items support the worklist. Currently you may only access Tasks through the Worklist.

Use the Work Place or icWork menu and toolbar options to:

- Request the next Worklist item
If you have an open Worklist item, it is closed and a new work item is launched into the appropriate application.
- Reschedule a Worklist item
This will pop up a control you may use to defer the worklist item. From the reschedule control you may also request the next worklist item or complete worklist work.
- Complete Worklist
Return and close the current worklist item and stop receiving work from the worklist.

1.2.8 Softphone Tab

The softphone allows users to view call information and to control the call. Use the softphone to:

- Initiate a call (dial a number)
- Answer an inbound call (Your phone may be configured for "auto answer". If it is you do not need to answer incoming calls.)
- Place an active call on hold
- Hang-up an active call
- Transfer a call to another agent
- Conference another agent into an existing call
- View call information such as call classification or campaign, customer information or IVR activities.
- View call state, for example, which line is ringing on hold, etc.

1.2.9 Notice Tab

Notices inform users about important events. For example, application work items can send a notice when a work item is assigned, a customer updates a work item through a self-service application, or when a work item closes.

The Notice Control allows you to:

- Read notices
- Acknowledge notices
- Close a notice (no longer appears in the Notice control)
- Filter notices by age (e.g., all new notices, today's notices)
- Check for new notices ("refresh")
- Navigate forward, backward, to the beginning or end of the current notice list (based on the applied filter)

1.2.10 Phone Extension Window

If you are enabled for media work, then the Phone Extension window may appear when you start Universal Work Queue. If the Phone Extension window appears, enter the teleset number for the teleset and then click **OK**.

Note: If the Profile Extension window appears and you do not know the teleset number, contact your supervisor.

The Phone Extension window will not appear if your user profile has been configured with the teleset number.

1.2.11 Screen Pop

A screen pop presents a fully populated application form or search screen based on media (call) information. Because the screen pop and phone call arrive nearly simultaneously you can begin helping the customer almost immediately. Oracle Universal Work Queue works with the application and customer channel to effect the screen pop. When you receive an interaction from a customer channel, Oracle Universal Work Queue launches the appropriate application form and delivers the media information (call information) to the application. The application populates the form with customer or work information or both.

1.2.12 Interaction Blending

Interaction Blending mixes work from different customer channels according to service level rules such as the length of time a customer wait on an inbound call and the number of agents available to handle the interaction. When Interaction Blending is enabled, a blending work source appears in the work selector. Each

time you request a blending work item, blending considers your skills and where they are most required.

Interaction Blending through Oracle Universal Work Queue supports both inbound and outbound telephony and may blend across inbound classifications. Once blending assigns you to a work source it tries to continue giving you work from that source; however, if you are needed on another work source, blending will move you. For example, if a flood of inbound calls arrives around lunchtime, you may move from an outbound campaign to an inbound classification to help out; later blending may move you back to the outbound campaign.

All work you perform on behalf of a customer can be divided into two categories: interactions and general work, sometimes called maintenance or off-line work. An interaction is any work you perform when communicating across a customer channel such as an inbound or outbound telephone call, through e-mail or across a web collaboration session. General work is any other work, especially work performed on behalf of a customer without a customer channel.

1.2.13 Refresh Strategy

In order for Oracle Universal Work Queue to provide up-to-date work information, including counts for all work and channel types, it must refresh its information from the work source.

Oracle Universal Work Queue provides a number of work refresh methods:

- Full refresh
- Node refresh
- Sub-node refresh

Note: You cannot perform node or sub-node updates from the cascading work selector. You may or may not be enabled to refresh nodes and sub-nodes through the work selector tree depending on how you are configured.

The following table describes the refresh methods.

Refresh Style	Description
Full Refresh	Refreshes both the counts and contents of all work sources. Oracle Universal Work Queue may be configured for automatic or manual full refresh. See the table below that details refresh strategies.
Node Refresh	This refresh method allows you to manually update any work source node counts and contents from the work selector tree.
Sub-node Refresh	This method allows you to manually update any work source sub-node counts and contents from the work selector tree.

The refresh for some work sources can be lengthy. Oracle Universal Work Queue supports the refresh strategies by providing the following refresh styles:

- Automatic Refresh
- Refresh on Login
- Manual Refresh

Note: Because refreshing work source contents and counts takes a long time, it is "expensive", most users are configured for refresh on login or manual refresh. Typically users need to refresh at the start of their session, when they return from break, after a rush of work (for example after a number assignment notices), or after an hour or two of continuous work.

The following table refresh styles for Universal Work Queue.

Refresh Style	Description
Automatic Refresh	A full refresh is performed when you request the next work item. This is not recommended since it can take some time for some nodes to refresh.
Refresh on Login	Performs a refresh when you first log in. This is recommended, however it may delay the time to start working. After this first update, you must manually refresh work when appropriate.
Manual Refresh	You must manually request a refresh when you need to obtain the current counts.

1.2.14 Work Assignment

Oracle Universal Work Queue can present all of your work. However, if you are not properly configured you may miss seeing some work. Work assignment explains how and why Oracle Universal Work Queue presents work items.

Work is organized into seeded nodes called work sources. In order to see an assigned work item, your supervisor or administrator must configure you to access the work source (node). Customer channels are special work sources that queue and deliver work when you request it. Application work items are assigned to you or a group through a number of means:

- automatically through Assignment Manager and territories
- manually when another user assigns a work item
- automatically as the creator of the work item

Work may either be assigned to you or owned by you. Assignment means you are responsible for completing the task, ownership means you are responsible for managing the task and making sure it is completed. Only tasks may be assigned and tasks may also be owned. All other work items, such as service requests, leads and opportunities are owned.

Work may either be assigned to or owned directly by you, so you are personally responsible for it. Work may also be assigned to or owned by a group to which you belong. Oracle Universal Work Queue provides a full view of all work, whether owned or assigned directly to you or to a group.

1.2.15 Delivery of Work Items

Oracle Universal Work Queue delivers work to an application by executing a screen pop into an application form. The method of delivery differs for application work items and customer channel work items. For example, if a channel item does not contain complete information you may receive an intermediary search or decision screen. For example, a call on behalf of an account with two customers will launch a decision screen where you can select which customer is calling. A call from a pay phone may not include any customer information; in this case the application will screen pop a search screen and you will need to gather the customer information.

No matter whether you are working within an interaction or performing general work, Oracle Universal Work Queue provides tools that allow you to view, manage, organize, act upon, and control your work.

The main Oracle Universal Work Queue components are:

- Agent Work Place -- this allows you to view, manage, organize and act upon work. The Work Places manages connections to all your work sources, allows you to navigate your work sources and individual work items, selecting, reviewing and organizing information to best suit your work methods.
- IcWork Controller – this interaction center work controller allows you to control open interactions, imbeds media controllers such as the softphone, and presents real-time notice of important work item events.

1.2.16 Navigating Oracle Universal Work Queue

This section provides you with information and shortcuts for navigating within Oracle Universal Work Queue.

Keyboard Navigation

In addition to being able to use the mouse to access and select work nodes and work items, you can accomplish the same tasks through the use of the keyboard.

Shortcut keys provide another means for navigating within the Oracle Universal Work Queue interface. See Menu Bar and Toolbar, Tools - Keyboard Shortcuts, Actions - Keyboard Shorts, and icWork Controller Keyboard Shortcuts for additional information. When using either the Tab key or Arrow keys to navigate within the interface, fields in which the information is predefined and available for selection only are denoted by a perforated line above and below the field. A blinking cursor appears in fields in which you are able to enter text.

The following table presents keyboard shortcuts for navigating in the Oracle Universal Work Queue interface.

Function	Shortcut Key
Activate keyboard operation and selection mode	<ul style="list-style-type: none"> ■ Left Arrow ■ Right Arrow ■ Shift + Shortcut Key
Activate keyboard operation and selection mode	Alt
Navigate between menu bar options	<ul style="list-style-type: none"> ■ Left Arrow ■ Right Arrow ■ Shift + Shortcut Key

Function	Shortcut Key
Exit from a keyboard option	Esc
Exit from keyboard operation mode	Esc
Navigate between fields in the interface	Tab
Navigate between fields in the interface	<ul style="list-style-type: none"> ■ Up Arrow ■ Down Arrow ■ Right Arrow ■ Left Arrow

Menu Bar and Toolbar

The menu bar and toolbar in Oracle Universal Work Queue provide several ways for you to quickly access features and navigate within the Oracle Universal Work Queue interface. You can perform the following:

- switch responsibility
- clear the current quick filter setting
- reset quick filter settings to the default setting
- refresh all work
- reset an interaction
- toggle the Oracle Universal Work Queue display between cascade and Hgrid view respectively
- get work
- stop media work

Tools - Keyboard Shortcuts The following table features keyboard shortcuts for functions available from the Tools option on the menu bar in Oracle Universal Work Queue.

Function	Shortcut Key
Refresh All Work	Shift + R
Reset Interaction	Shift + S

Function	Shortcut Key
Web Availability	Shift + W
Clear Filter	Shift + F
Default Filter	Shift + D
Switch display to Cascade	Shift + C
Switch display to Hgrid	Shift + H

Actions - Keyboard Shortcuts The following table features keyboard shortcuts for functions available from the Actions option on the menu bar in Oracle Universal Work Queue. If media is enabled, media handling actions can be performed from the icWork Controller, including the ability to access action options through the use of keyboard shortcuts.

Function	Shortcut Key
Get Work	Shift + G
Stop Media	Shift + S

icWork Controller - Keyboard Shortcuts The following table features keyboard shortcuts for functions available from the Actions option on the menu bar in the icWork Controller.

Function	Shortcut Key
Next Media	Shift + T
Stop Media	Shift + M
Break	Shift + K
Collapse	Shift + L

User Procedures

This chapter contains task-based procedures for using the product. The procedures will also appear in the product online help.

Topics include:

- [Getting Started with Oracle Universal Work Queue](#)
- [Working on Application Work Items](#)
- [Working on Media Work Items](#)
- [Using the icWork Controller](#)
- [Managing Sessions and Nodes](#)
- [Managing Queues and Counts](#)
- [Working with Quick Filters](#)

See Also

- [Concepts](#)

2.1 Getting Started with Oracle Universal Work Queue

The Universal Work Queue window displays your work items. Use this procedure to access the Universal Work Queue window.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

For application work:

- You must be defined as an employee in Oracle Applications.
- Your employee record must be linked to your Oracle Applications user account.
- Oracle Universal Work Queue profile options must be configured for application work.
- You must be defined as a CRM resource in Oracle Applications.
- You must have the appropriate CRM roles in your CRM resource record.
- You should identify the refresh strategy for the work item count in Universal Work Queue.

Work item counts may be refreshed when the Oracle Universal Work Queue window opens, after each delivery of a media work item, or manually (see [Section 2.6.3, "Refreshing Work Counts"](#)). The refresh strategy is set by your system administrator using the IEU: Desktop: UI: Refresh Style profile option. The refresh strategy may be the same for all agents in your interaction center or it may differ based on application, responsibility, or even user account.

For media work:

- You must satisfy the prerequisites for application work.
- Oracle interaction center information must be defined in your CRM resource record.
- Oracle Universal Work Queue profile options must be configured for media work.
- Oracle TeleSales or Oracle TeleService profile options must be configured for media work.
- You should identify your phone extension. For example, if your phone number is 123-456-7890 and the length of internal extensions for your interaction center is set to five, then your phone extension is 67890.

You may have to enter it when you navigate to Oracle Universal Work Queue. If your system administrator has entered your phone extension in the IEU: Optional: Phone Extension profile option for your user account, then you will not have to enter your phone extension.

Steps

1. Navigate to the Oracle Universal Work Queue window.

Application	Procedure
TeleService (Support)	<ul style="list-style-type: none"> ■ In the Navigator window, on the Functions tab, choose Universal Work Queue.
TeleSales	<ol style="list-style-type: none"> 1. In the Navigator window, on the Functions tab, choose eBusiness Center. 2. From the Tools menu, choose Universal Work Queue.

If you are enabled for application work only, then the Universal Work Queue window and the icWork Controller appear.

If you are enabled for media work, then the Phone Extension window may appear.

Note: If a phone extension is defined by the system administrator for your user account, then Universal Work Queue uses that phone extension for media work and does not display the Phone Extension window.

2. If the Phone Extension window appears, enter the extension of your physical phone and then click **OK**. For example, if your phone number is 123-456-7890 and the length of internal extensions for your interaction center is set to five, then enter 67890.

The Oracle Universal Work Queue window has two panes. The left pane lists the available work nodes and the count, or number, of work items in each node. The right pane displays the details of the work items in a selected node.

Work item counts may be refreshed when the Oracle Universal Work Queue window opens, after each delivery of a media work item, or manually. The refresh strategy is set by your system administrator. You may manually refresh work item counts at any time.

3. To manually refresh work counts, from the **Tools** menu, choose **Refresh**.

See Also

- [Section 2.2, "Working on Application Work Items"](#)

- [Section 2.3, "Working on Media Work Items"](#)
- [Section 2.4, "Using the icWork Controller"](#)
- [Section 2.5, "Managing Sessions and Nodes"](#)
- [Section 2.6, "Managing Queues and Counts"](#)

2.1.1 Universal Work Queue Desktop Display Views

There are two ways in which the work selector can be displayed in Oracle Universal Work Queue; cascade view or Hgrid. The cascade view allows the work selector to be presented in a "drop-down" menu in while, Hgrid, which is commonly referred to as "tree view" presents the work selector in a linear format.

The style that is available for use depends on how your facility is configured to display the work selector in Oracle Universal Work Queue.

2.1.2 Navigating Oracle Universal Work Queue

This section provides you with information and shortcuts for navigating within Oracle Universal Work Queue.

Keyboard Navigation

In addition to being able to use the mouse to access and select work nodes and work items, you can accomplish the same tasks through the use of the keyboard.

The following table presents keyboard shortcuts for navigating in the Oracle Universal Work Queue interface.

Function	Shortcut Key
Activate keyboard operation and selection mode	<ul style="list-style-type: none"> ■ Left Arrow ■ Right Arrow ■ Shift + Shortcut Key
Activate keyboard operation and selection mode	Alt
Navigate between menu bar options	<ul style="list-style-type: none"> ■ Left Arrow ■ Right Arrow ■ Shift + Shortcut Key

Function	Shortcut Key
Exit from a keyboard option	Esc
Exit from keyboard operation mode	Esc
Navigate between fields in the interface	Tab
Navigate between fields in the interface	<ul style="list-style-type: none"> ■ Up Arrow ■ Down Arrow ■ Right Arrow ■ Left Arrow

Note: Shortcut keys provide another means for navigating within the Oracle Universal Work Queue interface. See Menu Bar and Toolbar, Tools - Keyboard Shortcuts, Actions - Keyboard Shortcuts, and icWork Controller - Keyboard Shortcuts for additional information. When using either the Tab key or Arrow keys to navigate within the interface, fields in which the information is predefined and available for selection only are denoted by a perforated line above and below the field. A blinking cursor appears in fields in which you are able to enter text.

Menu Bar and Toolbar

The menu bar and toolbar in Oracle Universal Work Queue provide several ways for you to quickly access features and navigate within the Oracle Universal Work Queue interface. You can perform the following:

- switch responsibility
- clear the current quick filter setting
- reset quick filter settings to the default setting
- refresh all work
- reset an interaction
- toggle the Oracle Universal Work Queue display between cascade and Hgrid view respectively

- get work
- stop media work

Tools - Keyboard Shortcuts The following table features keyboard shortcuts for functions available from the Tools option on the menu bar in Oracle Universal Work Queue.

Function	Shortcut Keys
Refresh All Work	Shift + R
Reset Interaction	Shift + S
Web Availability	Shift + W
Clear Filter	Shift + F
Default Filter	Shift + D
Switch display to Cascade	Shift + C
Switch display to Hgrid	Shift + H

Actions - Keyboard Shortcuts The following table features keyboard shortcuts for functions available from the Actions option on the menu bar in Oracle Universal Work Queue. If media is enabled, media handling actions can be performed from the icWork Controller including the ability to access action options through the use of keyboard shortcuts. The following is a list of the keyboard shortcuts available from the icWork Controller.

Function	Shortcut Keys
Get Work	Shift + G
Stop Media	Shift + S

2.2 Working on Application Work Items

Use the following procedures to manage application work items.

Tasks

You can perform the following tasks:

- [Browse Application Work Items](#)

- [Request the Next Priority Application Work Item](#)
- [Reschedule Application Work Items](#)
- [Stop the Delivery of Work Items](#)

2.2.1 Browsing Application Work Items

The individual application (non-media) work item nodes allow you to browse lists of individual work items and select a specific item to work on.

Use this procedure to browse and select a work item.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. From the work selector in the agent workplace in Universal Work Queue, select an application work source (node).

Note: If necessary, expand the application node to access the work item nodes.

The work items are listed in the detail pane.

2. Select a work item from the detail pane.
3. Click **Get Work**.

Note: Whether you using the icWork Controller or accessing work items from agent workplace, use the Get Work function to retrieve work items. You may also double-click on the work item in the work selector to select the work item.

The appropriate application window will open and will present the details of the work item.

4. When you finish, save your work in the application window.
5. To select another work item, select the work item and then click **Get Work**.

Guidelines

The following table lists the application work nodes and the application window that opens when you work on an item in the node.

Work Node	Application
Tasks	Task Manager, TeleSales, or TeleService
Service Request	Service Requests (TeleService)
Escalations	Escalations (CRM Foundation)
My Leads	Leads Center (TeleSales)
My Opportunities	Opportunity Center (TeleSales)
Forecasts	
Quotes	TeleSales
Delinquencies	Collections
Marketing Lists	TeleSales
Broken Promises	Collections
Dunning	Collections

- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Hiding Work Counts](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)

- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)

2.2.2 Requesting the Next Priority Application Work Item

Use this procedure to request the next priority work item in your WorkList.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. From the icWork or agent workplace, select the **Next Worklist Item** menu option or toolbar icon.

The next item in the worklist appears in the detail pane.

2.2.3 Rescheduling a Work Item

Use this procedure to reschedule a work item in your WorkList.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. From the icWork or agent workplace, select the **Reschedule Worklist Item** menu option or toolbar icon.

2.2.4 Stopping Work Item Delivery

Use this procedure to stop the delivery of application work items.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. From the icWork or agent workplace, select the **Stop Worklist** menu option or toolbar icon.

See Also

- [Refreshing Work Counts](#)
- [Handling Inbound Telephone Calls](#)
- [Working on Outbound Campaigns](#)
- [Returning Web Callbacks](#)
- [Managing Blended Calls](#)
- [Viewing Your E-mail Workload](#)
- [Modifying Your Node Order](#)

2.3 Working on Media Work Items

Use the following procedures to handle media work items.

Tasks

- [Handling Inbound Telephone Calls](#)
- [Working on Outbound Campaigns](#)
- [Returning Web Callbacks](#)

- [Managing Blended Calls](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)
- [Resetting an Interaction](#)

2.3.1 Handling Inbound Telephone Calls

When the interaction center receives an inbound call, the call is classified and then routed to a pool of one or more agents. Your Inbound Telephony node displays the number of inbound calls that have been routed to agent groups to which you belong.

Inbound call counts are categorized by call classification. Only call classifications with available inbound calls are listed, even though you may be eligible to answer calls in other call classifications.

Other agents may be eligible to answer calls in a call classification. The inbound call count for a call classification will decrease when another agent answers a call. When the last remaining call for a call classification is answered, the call classification will disappear from your inbound telephony node.

Use this procedure to indicate that you are ready to receive inbound calls.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. In the Universal Work Queue window, expand the Media node and click **Inbound Telephony**.

Inbound calls counts are categorized by call classification in the detail pane.

2.3.1.1 To Start Receiving Inbound Calls

To start receiving inbound calls:

1. Click a call classification.
2. Click **Get Work**.

When the call is delivered, Oracle Universal Work Queue and the application execute a screen pop. Oracle Universal Work Queue launches the appropriate application window based on the classification action setting and passes the call information. The application opens the work item and displays the work details.

3. Work within the application during your customer interaction. At the end of the call, press **Release** on the softphone to hang up the call.

If there is after-call work, such as completing an order or sending collateral, complete it within the application.

When you have completed all after-call work, you may wrap up and status the interaction.

- a. Automatically status
- b. Manual (wrap up)

2.3.1.2 To End an Inbound Call

To end the call and complete your work in the current interaction:

1. Press **Release** on the softphone to hang up the call.
2. Complete your work.
3. Wrap up the interaction.

2.3.1.3 To End the Interaction and Request Another in the Same Classification

To manually wrap up an interaction and request another call of the same classification:

Note: This only applies to manually wrapping up an interaction. You do not have to click **Next Media** in the icWork Controller toolbar. Automatic status will end the interaction.

1. Select a call outcome.

2. Complete all media work.
3. Click **End Interaction** in the application window.

You are now ready to receive inbound calls of the same classification.

2.3.1.4 To End an Interaction and Suspend Call Delivery

To stop working the inbound classification and suspend call delivery:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.

Note: If you are using session tracking, you may request a break and suspend inbound calls.

2.3.1.5 To Change Customer Channels

To change customer channels:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Select a new customer channel.

Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

2.3.1.6 To Request Calls of a Different Classification

To stop working the inbound classification and suspend call delivery:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.

4. Click **End Interaction** in the application window.

Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

5. Select a different inbound call classification or an outbound campaign from the agent workplace in Oracle Universal Work Queue.

See Also

- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.3.2 Working on Outbound Campaigns

Use this procedure to start making outbound calls for a campaign.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. From the agent workplace, select the media node and the outbound campaign sub-nodes using the Hgrid (tree) or cascading work selector.

Outbound calls counts are categorized by campaign in the detail pane.

2.3.2.1 To Start Making Outbound Calls

To start making outbound calls:

1. Select a campaign.
2. Click **Get Work**.

The appropriate application window opens and displays the details of the work item.

3. If necessary, place the call using the softphone.

2.3.2.2 To End an Outbound Call

To end the outbound call and complete your work in the current interaction:

1. Press **Release** on the softphone to hang up the call.
2. Complete your work.
3. Wrap up the interaction.

2.3.2.3 To End the Interaction and Request Another of the Same Campaign

To end the interaction and request another interaction for the same campaign:

Note: You do not have to click **Next Media** in the icWork Controller toolbar. Automatic status will end the interaction.

1. Select a call outcome.
2. Complete all media work.
3. Click **End Interaction** in the application window.

You are now ready to receive calls of the same classification.

2.3.2.4 To End the Outbound Interaction and Suspend Call Delivery

To end the outbound interaction and suspend call delivery:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.

Note: If a call is on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

2.3.2.5 To Change Outbound Campaigns

To handle calls for a different campaign:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.

Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

5. Select a different campaign.
6. Click **Get Work**.

See Also

- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)

- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.3.3 Returning Web Callbacks

While browsing your company's web pages, customers may request a callback to answer an immediate question. This callback request is relayed through the interaction which queues and routes the call request as if it were an inbound call. When an agent is available to handle the callback request, interaction center dials the customer and Oracle Universal Work Queue delivers the call just as it does inbound calls.

Use this procedure to return and handle web callbacks.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. In the Universal Work Queue window, expand the Media node and click **Web Callback**.

Web callback counts are categorized by call classification in the detail pane.

2.3.3.1 To Start Returning Web Callbacks

To start returning web callbacks:

1. Select a campaign.
2. Click **Get Work**.

The appropriate application window opens and displays the details of the work item.

3. If necessary, place the call using the softphone.

2.3.3.2 To End the Web Callback

To end the web callback call and complete your work in the current interaction:

1. Press **Release** on the softphone to hang up the call.
2. Complete your work.
3. Wrap up the interaction.

2.3.3.3 To End the Web Callback and Request Another of the Same Type

To end the web callback and request another call of the same type:

Note: You do not have to click **Next Media** in the icWork Controller toolbar. Automatic status will end the interaction.

1. Select a call outcome.
2. Complete all media work.
3. Click **End Interaction** in the application window.

You can now ready to receive calls of the same classification.

2.3.3.4 To End the Web Callback and Suspend Call Delivery

To end the web callback and suspend call delivery:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.

Note: If a call is on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

2.3.3.5 To Request Calls for a Different Classification

To request calls for a different classification:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.

Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

5. Select a different call classification.
6. Click **Get Work**.

See Also

- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Restoring Queues](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)

- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.3.4 Managing Blended Calls

Oracle Universal Work Queue handles service level blending and priority source blending. When media work blending is enabled, the Media node is replaced with a Blended node.

Note: If you are configured for priority source blending, you must select an outbound campaign order at startup.

Use this procedure to start handling blended calls.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. In the Universal Work Queue window, click **Blended**.
Media work is categorized by type in the detail pane.
2. To start handling blended calls, click a node and then click **Get Work**.
The appropriate application window opens and displays the details of the work item.
3. If you want to end the call and complete your work in the current interaction, then do the following:
 - a. Click **Release** on the softphone to hang up the call.
 - b. Click **Wrap Up** in the application window.
 - c. Complete your work.

4. If you want to end the interaction and request another call from the Blended node, then do the following:
 - a. Click **End Interaction** in the application window.
 - b. Select a call outcome.

Note: You do not have to click **Next Media** in the icWork Controller toolbar.

You are now ready to receive a call.

5. If you want to end the interaction and suspend call delivery, then do the following:
 - a. Click **Stop Media** in the icWork Controller or Oracle Applications toolbar.
 - b. Click **End Interaction** in the application window.
 - c. Select a call outcome.

Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

6. If you want to request calls of a different media type, then do the following:
 - a. Click **Stop Media** in the icWork Controller or Oracle Applications toolbar.
 - b. Click **End Interaction** in the application window.
 - c. Select a call outcome.

Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

- d. Click a different call classification and then click **Get Work** in the Oracle Universal Work Queue window.

See Also

- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.3.5 Viewing Your Email Workload

You cannot launch Oracle EMail Center from Oracle Universal Work Queue. You can only view your e-mail workload. To launch Oracle eMail Center, you must go to the HTML Login URL and log on as an eMail Center agent.

Use this procedure to view your e-mail work load.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. In the Universal Work Queue window, expand the Media node and click an e-mail node.

A summary is displayed in the detail pane.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Hiding Work Counts](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Using the Softphone in the icWork Controller](#)

2.3.6 Resetting an Interaction

Use this procedure to reset an interaction.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. From the **Tools** menu, choose **Reset Interaction**.

You cannot use the Oracle Universal Work Queue window until after the interaction is reset.

See Also

- [Refreshing Work Counts](#)
- [Restoring Queues](#)
- [Showing Work Counts](#)

2.4 Using the icWork Controller

Use the following procedures to operate the softphone.

Tasks

You can perform the following tasks:

- [Using the Softphone in the icWork Controller](#)
- [Managing Notices from the icWork Controller](#)

2.4.1 Using the Softphone in the icWork Controller

The softphone is displayed in the Phone tab of the icWork Controller. The color of the softphone line buttons (for example, Line 1) indicate the status of the line. Use the following table to interpret the color.

If the line color is...	Then the line is...
Gray	Selected
Green	In use
Yellow	Ringling

Use the following procedure to operate the softphone.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. In the icWork Controller, click the Phone tab.

Note: For the Lucent Avaya switch with Dialogic CT-Connect middleware, softphone auto-hold is enabled. Any current call will be placed on hold when you click another line button. To hang up the current call, click Release.

If softphone auto-hold is not enabled, then the current call will end when you click another line button. To put any current call on hold, you must click Hold.

Use the following table to find procedures for operating the softphone.

To...	Do this...
Answer a call	<p>Click a yellow line button (for example, Line 1).</p> <p>Note: If the switch is set for auto-hold, then clicking another line button will place any current call on hold.</p> <p>If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button.</p>

To...	Do this...
Place a call	<ol style="list-style-type: none"> 1. Click a gray line button (for example, Line 1). Note: If the switch is set for auto-hold, then clicking another line button will place any current call on hold. If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button. 2. Click the number buttons, type the numbers using your keyboard, or select a previously entered number. 3. Click Dial.
Enter a response to a voice prompt	<ol style="list-style-type: none"> 1. Click the number buttons, type the numbers using your keyboard, or select a previously entered number. 2. Click Dial.
Place a call on hold	<p>Click Hold.</p> <p>The line button for a holding line blinks green.</p> <p>Note: If the switch is set for auto-hold, then clicking another line button (for example, Line 1) will also place the current call on hold.</p> <p>If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button.</p>
Remove a call from hold	<p>The line button for a holding line blinks green.</p> <p>If only one line is holding, Click Hold.</p> <p>If multiple lines are holding, click the line button (for example, Line 1) for the holding line.</p>
Hang up a call	<p>Click Release or click another line button (Line 1)</p> <p>Note: If the switch is set for auto-hold, then clicking another line button will place the current call on hold and not release the call. You must return to the line and then click Release.</p> <p>If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button.</p>

To...	Do this...
Transfer a call	<p data-bbox="811 267 1239 319">To transfer a call with the softphone on a <i>non-Aspect</i> switch:</p> <ol data-bbox="811 336 1310 562" style="list-style-type: none"><li data-bbox="811 336 1310 388">1. With the caller on the line, dial the number to which you want to transfer the call.<li data-bbox="811 406 1310 493">2. Click Transfer. The call is put on hold and the number is dialed.<li data-bbox="811 510 1310 562">3. When the call is answered, click Transfer again. <p data-bbox="811 579 1253 631">To transfer a call with the softphone on an <i>Aspect</i> switch:</p> <ol data-bbox="811 649 1310 812" style="list-style-type: none"><li data-bbox="811 649 1239 671">1. Click Hold to place the call on hold.<li data-bbox="811 689 1119 711">2. Select a gray line button.<li data-bbox="811 729 1262 779">3. Dial the number to which you want to transfer the call.<li data-bbox="811 796 1296 819">4. When the call is answered, click Transfer.
Conference a call	<p data-bbox="811 835 1272 887">To conference a call with the softphone on a <i>non-Aspect</i> switch:</p> <ol data-bbox="811 904 1310 1130" style="list-style-type: none"><li data-bbox="811 904 1310 956">1. With the caller on the line, dial the number that you want to add to the conference call.<li data-bbox="811 973 1310 1060">2. Click Conference. The call is put on hold and the number is dialed.<li data-bbox="811 1078 1196 1130">3. When the call is answered, click Conference again. <p data-bbox="811 1147 1286 1199">To conference a call with the softphone on an <i>Aspect</i> switch:</p> <ol data-bbox="811 1216 1310 1407" style="list-style-type: none"><li data-bbox="811 1216 1239 1239">1. Click Hold to place the call on hold.<li data-bbox="811 1256 1119 1279">2. Select a gray line button.<li data-bbox="811 1296 1286 1347">3. Dial the number that you want to add to the conference call.<li data-bbox="811 1364 1196 1416">4. When the call is answered, click Conference.
Indicate readiness for calls.	Click Next Call .

To...	Do this...
Suspend calls.	Click Cancel . Note: If a call is already on its way to you before you click Cancel, then you will receive one more call before your calls are suspended.
Request the next priority application work item from your WorkList	Click Next Worklist Item .
Take a break	<ol style="list-style-type: none">1. Click Break.2. Select a break reason.3. Click OK.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Viewing Your E-mail Workload](#)
- [Ending Your Oracle Universal Work Queue Session](#)

2.4.2 Managing Notices from the icWork Controller

Notices are displayed in the Notices tab of the icWork Controller. Use the following procedure to manage your notices.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. In the icWork Controller, click the Notices tab.

The following table describes the actions that you can perform in the Notices tab.

To...	Do this...
Navigate through your notices	Click the arrow buttons.
Acknowledge receipt of a new notice	Click ACK .
Clear a notice from the Notices tab	Click CLR .
Filter your notices	Select a filter from the Message Filter list.
Check for new notices	Click Refresh .

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)

- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.5 Managing Sessions and Nodes

Use the following procedures to manage sessions and nodes.

Tasks

You can perform the following tasks:

- [Modifying Your Node Order](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Ending Your Oracle Universal Work Queue Session](#)

2.5.1 Modifying Your Node Order

The Work Selector provides an overview of your workload; it is organized into work source nodes by application work type (such as Tasks, Leads, Service Requests, etc.) and customer channel source (such as Inbound Telephone calls, Outbound Campaigns, eMail, etc.) Some nodes comprise more specific work item types such as “My Leads” or “My Teams Leads”. Most nodes are further segmented into sub-nodes by attributes, such as application work type status, age or ownership. Some nodes have several sub-node segmentation tiers.

The Hgrid (tree) work selector displays along the left side of the agent workplace. It provides a quick overview of workload and its organization. It also enables you to turn counts on and off and to control the display and order of nodes.

The cascading work selector displays as a drop down menu at the top left of the agent workplace, just below the menu bar and toolbar. It is more compact and affords a great display area for the work summary panel.

Use the Switch work selector control or menu option to toggle between the tree and cascading work selector display styles.

Use this procedure to change the order in which work nodes appear in the work selector in Oracle Universal Work Queue.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Preferences

Prerequisites

None

Steps

1. Choose **Edit > Preferences > Profile**.

The Personal Profile Values window appears.

2. Choose **View > Query by Example > Enter** (F11).

3. In the Profile Name field, enter **IEU%**.

4. Choose **View > Query by Example > Run** (Ctrl + F11)

The Universal Work Queue personal profile values appear.

5. In the IEU: Queue Order: <nodename> profile options, select a number between 1 through 26.

Nodes are displayed in ascending order in the Oracle Universal Work Queue window.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)

- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.5.2 Taking a Break from Your Oracle Universal Work Queue Session

Use this procedure to take a formal break from your Oracle Universal Work Queue session.

Note: You may only request a break if you are configured for session tracking.

You may only request a break if you are configured for session tracking.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. In the icWork Controller toolbar or Actions menu, click **Break**.
2. In the Break Reason window, select the reason for the break and then click **OK**.
3. To resume work, do one of the following:
 - From the Oracle Universal Work Queue window, select a node and then click **Get Work**.
 - In the icWork Controller or the Oracle Applications toolbar, click **Next Worklist Item** to receive the next priority application work item.
 - In the icWork Controller toolbar, click **Next Media** to handle the next media work item of the current type.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)

- [Viewing Your E-mail Workload](#)

2.5.3 Ending Your Universal Work Queue Session

Use this procedure to close the Universal Work Queue window and end your Universal Work Queue session.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. Close the Oracle Universal Work Queue window (File > Close Form) or exit from Oracle Applications (File > Exit Oracle Applications).
If session history logging is enabled, the Break Reason window will appear.
2. In the Break Reason window, select the break reason and then click **OK**.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)

- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.6 Managing Queues and Counts

Use the following procedures to manage queues and counts.

Tasks

You can perform the following tasks:

- [Customizing Queues](#)
- [Restoring Queues](#)
- [Refreshing Work Counts](#)
- [Hiding Work Counts](#)
- [Showing Work Counts](#)

2.6.1 Customizing Queues

Use this procedure to customize the display and order of work queues.

Note: Use the switch work selector control to toggle between the Hgrid (tree) and cascade work selectors.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

Oracle Universal Work Queue must be configured to display the work selector using the Hgrid (tree) work selector. In addition, your user profile must also be set up to view the work selector in Hgrid selector mode.

Steps

1. In the Oracle Universal Work Queue window, right-click on **Queue**.

The Queue Control window appears.

The following table describes the options available for you to select.

To...	Select this option...
Refresh counts	Refresh
Customize the queue	Customize
Restore queue settings	Restore Queues
Hide work counts	Hide Counts

2. Choose **Customize Queues**.

The Customize Queues window appears.

3. Select the node(s) to exclude or display.

You can move nodes between those excluded or displayed by using the appropriate button.

4. Select the appropriate button to sort the order the nodes in the work queue. You can sort the nodes in ascending or descending order.

5. Click **OK**.

See Also

- [Browse Application Work Items](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)

- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.6.2 Restoring Queues

Use this procedure to restore the display and order of work queues.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

You must be configured to customize work queues.

Steps

1. In the Oracle Universal Work Queue window, right-click on **Queue**.

The Queue Control window appears.

2. Choose **Restore Queues**.

The Oracle Universal Work Queue window will refresh and the queue order will be restored to the default setting.

See Also

- [Browse Application Work Items](#)

- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
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- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.6.3 Refreshing Work Counts

You can refresh individual work node counts using the Hgrid (tree) work selector. Work item counts may be refreshed when the Oracle Universal Work Queue window opens, after each delivery of a media work item, or manually. You may manually refresh work item counts at any time.

The refresh strategy is set by your system administrator. The refresh strategy may be the same for all agents in your interaction center or it may differ based on application, responsibility, or even user account.

Use this procedure to manually refresh work item counts.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. From the **Tools** menu, choose **Refresh**.

You cannot use the Oracle Universal Work Queue window until after the count is refreshed.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
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- [Restoring Queues](#)
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- [Showing Work Counts](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.6.4 Hiding Work Counts

Use this procedure to hide node counts in the Oracle Universal Work Queue window.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

Oracle Universal Work Queue must be configured to display the work selector using the Hgrid (tree) work selector. In addition, you must be configured to customize queues. Use the switch work selector control to toggle to the Hgrid (tree) work selector.

Steps

1. In the Oracle Universal Work Queue window, right-click on **Queue**.
The Queue Control window appears.
2. Select **Hide Counts**.
The Oracle Universal Work Queue window will refresh and counts for the work nodes will not appear.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Showing Work Counts](#)

- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.6.5 Showing Work Counts

Use this procedure to show node counts in the Oracle Universal Work Queue window.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

Oracle Universal Work Queue must be configured to display the work selector using the Hgrid (tree) work selector. In addition, you must be configured to customize queues. Use the switch work selector control to toggle to the Hgrid (tree) work selector.

Steps

1. In the Oracle Universal Work Queue window, right-click on **Queue**.
The Queue Control window appears.
2. Deselect **Hide Counts**.
The Oracle Universal Work Queue window will refresh and all counts for the work nodes will appear.

See Also

- [Browse Application Work Items](#)
- [Customizing Queues](#)
- [Ending Your Oracle Universal Work Queue Session](#)
- [Handling Inbound Telephone Calls](#)

- [Hiding Work Counts](#)
- [Managing Blended Calls](#)
- [Managing Notices from the icWork Controller](#)
- [Modifying Your Node Order](#)
- [Refreshing Work Counts](#)
- [Request the Next Priority Application Work Item](#)
- [Restoring Queues](#)
- [Returning Web Callbacks](#)
- [Taking a Break from Your Oracle Universal Work Queue Session](#)
- [Working on Outbound Campaigns](#)
- [Using the Softphone in the icWork Controller](#)
- [Viewing Your E-mail Workload](#)

2.7 Working with Quick Filters

The quick filter feature allows you to sort the presentation of work items in Oracle Universal Work Queue. Each quick filter column is identified by a field label which indicates the sorts or filters available. Within each column is a list of variables from which you can select.

When you first enter the Oracle Universal Work Queue interface to access and process work items, the default quick filters appear. These default filters are set by your system administrator. You can modify the sort order of the work items, prioritizing work items based on your priorities or work objectives. For example, sorting tasks that are assigned to you or due today. Upon determining the filter criteria, you will need to apply the filters using the Apply Filter button located to the right of the filter columns.

Note: Your system administrator manages the filter columns for each work provider. There is a default quick filter for each work provider node.

Use the following procedures to work with quick filters.

Tasks

You can perform the following tasks:

- [Applying Quick Filters](#)
- [Clearing Quick Filters](#)
- [Restoring the Default Quick Filter](#)

2.7.1 Applying Quick Filters

Use this procedure to apply quick filters to your work view.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

Quick filters must be defined for the work provider and enabled and the appropriate profile options must be set.

Steps

1. In the Oracle Universal Work Queue agent workplace, use the drop-down filter parameters to select quick filter values.

Note: The Clear Filter option is available from the Tools option on the menu bar and from a button on the toolbar.

2. Click the In the Oracle Universal Work Queue window, select the **Apply Filter** button.

The work summary panel will refresh and display work items that qualify for the new filter.

Note: If there are no work items that meet the filter criteria, no work will display in the work detail area. The filter will only apply to the current session. When you end your session, the filters setting revert to the default settings. You will notice when you log in back in to the Oracle Universal Work Queue agent workplace, the default settings for the quick filters have been applied.

See Also

- [Working with Quick Filters](#)
- [Clearing Quick Filters](#)
- [Restoring the Default Quick Filter](#)

2.7.2 Clearing Quick Filters

Use this procedure to clear the quick filters that you have applied.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

Quick filters must be defined for the work provider and enabled and the appropriate profile options must be set. You must have applied quick filters other than the default filters.

Steps

1. In the Oracle Universal Work Queue window, select the **Clear Filter** option.

Note: The Clear Filter option is available from the Tools option on the menu bar and from a button on the toolbar.

The filters that you have applied will clear and the work items in the work summary panel in Oracle Universal Work Queue will appear in their original view.

See Also

- [Working with Quick Filters](#)
- [Applying Quick Filters](#)
- [Restoring the Default Quick Filter](#)

2.7.3 Restoring the Default Quick Filter

Use this procedure to restore the default quick filter to your work view.

Login

Oracle Forms Applications

Responsibility

Customer Support or TeleSales Agent

Prerequisites

Quick filters must be defined for the work provider and enabled and the appropriate profile options must be set.

Steps

1. In the Oracle Universal Work Queue window, select the **Clear Filter** option.

Note: The Clear Filter option is available from the Tools option on the menu bar and from a button on the toolbar.

The filters that you have applied will clear and the work items in the work summary panel in Oracle Universal Work Queue will appear in their original view.

See Also

- [Working with Quick Filters](#)
- [Applying Quick Filters](#)

- [Clearing Quick Filters](#)