Oracle® Common Application Components

Implementation Guide

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Preface

Intended Audience

Welcome to Release 11i of the Oracle Common Application Components Implemenatation Guide.

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

- The principles and customary practices of your business area
- *Oracle Common Application Components*

  If you have never used *Oracle Common Application Components*, Oracle suggests you attend one or more of the *Oracle Common Application Components* 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.

Typographic Conventions

The following table describes this documents typographic conventions.

`Monospace text`	Monospace text represents code or SQL statements.
lowercase italics	Lowercase italics in the text represent variables. Substitute an appropriate value for the variable.

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Indentation	Indentation helps to show structure within code examples, but is not required.
<text>	Text inside angle brackets can mean either of the following: ■ It denotes a variable that is replaced with an actual value at runtime. ■ In indicates XML elements in discussions about XML code.
Bold	Text in bold either represents a button name or is used for emphasis.

Documentation Accessibility

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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 Common Application Components*.

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 Common Application Components 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 Common Application Components*.

Oracle CRM Technology Foundation Implementation 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 Common Application Components* (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 Common Application Components User's Guide

The User's Guide contains important reference and background information on each of the Oracle Common Application Components modules. In addition, it contains procedures and using information that describe the common user and tasks that are necessary to perform in each of the modules.

Oracle Common Application Components API Reference Guide

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

- Resource Manager
- Task Manager
- 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 guides and implementation guides.

Oracle Applications Supplemental e-Business Suite Installation Steps

This guide contains specific steps needed to complete installation of a few of the e-Business Suite 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 Common Application Components*. This manual details additional steps and setup considerations for implementing *Oracle Common Application Components* with this feature.

Multiple Organizations in Oracle Applications

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

Oracle Workflow Administrator's Guide

Refer to this book for WF setup steps, the administrator Status Monitor, and administrative scripts.

Oracle Workflow Developer's Guide

Refer to this book for the WorkflowBuilder, defining workflow processes, and defining BES events, subscriptions, agents, and systems.

Oracle Workflow User's Guide

Refer to this book for responding to notifications and the self-service Status Monitor.

Oracle Workflow API Reference

Refer to this book for PL/SQL and Java Workflow APIs.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the *Oracle Common Application Components* 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 Common Application Components Implementation Guide

Many e-Business products use Oracle Common Application Components. Use this guide to correctly implement Oracle Common Application Components.

Training and Support

Training

Oracle offers training courses to help you and your staff master *Oracle Common Application Components* 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 Common Application*

Components 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 Oracl*eMetaLin*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.

Part I

Getting Started

This part of the Common Application Components Implementation Guide contains the following chapters:

- Introduction
- Before You Begin

1

Introduction

This chapter provides information on the following topics:

- Oracle E-Business Suite Overview
- Oracle Common Application Components Overview
- New in this Release

1.1 Oracle E-Business Suite Overview

The Oracle E-Business Suite is a comprehensive Web-based answer for business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, and servicing through the Internet. The Oracle E-Business Suite consists of front-office Customer Relationship Management (CRM) applications and back-office Enterprise Resource Planning (ERP) applications. These applications automate marketing, sales, contracts, service, manufacturing, and supply chain processes as well as financial operations, project management, human resources operations, and business intelligence systems.

The Oracle E-Business Suite sits on a multi-layer platform which includes:

- Oracle 9*i* Database
- Oracle 9*i* Application Server
- Common Services and Components
- Oracle Internet Business Intelligence

Oracle 9*i* Database

All applications reside on the Oracle9*i* Database. The Oracle database drives enterprise E-Business applications, online transaction processing applications

(OLTP), query-intensive data warehouses, and high capacity Web sites. Because the Oracle database is available on many different platforms, applications can scale from handheld to laptop to desktop to enterprise providing consistent information over multiple channels.

Oracle 9*i* Application Server

The Oracle 9*i* Application Server (Oracle 9*i*AS) is a middle-tier server which independently delivers the technology needed to build Web sites and applications, create personalized portals, extract business intelligence, and manage a secure Web site infrastructure.

Common Services and Components

All the applications can leverage the common infrastructure and services components. Functionality includes Oracle Forms, Oracle Reports, Oracle Application Object Library (AOL), the Oracle JDeveloper and Oracle Discoverer development tools, the coding and UI standards, and other functionality used by the applications.

For example, you can extend the applications according to your business needs using flexfields. You can create and assign responsibilities using the system administrator responsibility. Also, you can use Oracle Workflow to configure background processes and set up notifications so that all the appropriate managers and groups are notified.

Oracle Internet Business Intelligence

Above the E-Business Suite sits the Internet Business Intelligence application. This application integrate data from all of the E-Business Suite applications to provide key performance measurements, operating alerts, and management reports to every decision maker across the enterprise.

1.1.1 The Applications in the E-Business Suite

Customers can seamlessly share data from front-end applications (CRM) to backend applications (ERP). The CRM applications include:

- the Marketing suite
- the Sales suite
- the Contracts suite
- the Service suite

- the eCommerce suite

The ERP applications include:

- Oracle Order Management
- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management System

Customer Relation Management (CRM)

Companies use Oracle's CRM suite of applications to acquire, maintain, and enhance customer relationships, by assisting companies with marketing automation, sales force automation, contracts management, customer service and support, and business intelligence, in a multi-channel environment.

- The Marketing suite provides campaign planning and execution, budget management, list creation, reporting and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service and operations.
- The Sales suite provides integrated tools for all those who are involved in the sales process, including field salespeople, telesales agents, distributors and resellers, customers purchasing over the Internet and sales executives.

  Armed with up-to-the minute information regarding customers, leads and opportunities, as well as forecasts and compensation plans and projections, managers can proactively and effectively manage a sales force while providing the sales people with the information needed to close sales. Using this information, the field sales force, telesales teams, resellers, and Web storefronts can collaborate in closing more business together as one sales team.
- The Contracts suite enables authoring, executing and managing contracts, warranties and extended warranties which provides visibility to contract entitlements and proactively acting upon contractual commitments. Whether a buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.
- The Service suite manages service activities with the goals of profitability, employee productivity and complete customer satisfaction by addressing all

service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

This suite of applications provides customer support, field service and depot repair functionality. In addition, Oracle Services offers complete visibility into spare parts availability, logistics, service billing and customer contract entitlements. Oracle Customer Care provides full access to customer information from each touch point in the enterprise and to each customer care agent or other employees who interact with the customer. All of the Service products can be deployed across Web, call center and mobile field channels.

- The eCommerce suite of products aids in establishing profitable long-term relationships with customers through one-to-one marketing and personalized shopping experiences as well as proactive support and self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating Web-based channels with traditional channels.

Enterprise Resource Planning (ERP)

Companies use the ERP applications to control their back-office operations. For example:

- Oracle Order Management applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions and flexibility to adapt to changing business conditions.
- Oracle Supply Chain Planning applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.
- Oracle Manufacturing applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.
- Oracle Financials provide solutions for strategic planning, accounting, treasury, project management, and travel management.
- Oracle Human Resources Management System is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

Common Application Architecture

The Common Application Architecture includes functionality that supports both CRM and ERP applications. For example, TCA, Oracle's Trading Community Architecture, consists of a database schema and Application Programming Interfaces (APIs) where you can model the complex relationships that occur within a business community and enter that data consistently throughout the enterprise. Because the model is not hierarchical, Oracle applications can model complex B2B2C relationships and not to be limited to either a B2B or B2C implementation. TCA delivers a 360-degree view of the customer.

1.1.2 Oracle Common Application Components

Oracle Common Application Components is:

- A common infrastructure upon which the CRM applications are built
- A set of application components that can be used by all of the CRM applications

Oracle CRM Foundation divides into the Oracle Common Application components and the Technical Foundation components.

The key to the CRM products is that they are architected, designed, and built as an integrated suite of applications using the Oracle Common Application components. This layered architecture approach ensures that all CRM applications can interact with key business objects in a consistent manner.

One of the most important components of the CRM Foundation is the customer data model known as the Trading Community Architecture or the TCA. This powerful model permits Oracle to capture complex customer relationships and to support flexible business models across industries.

Oracle Common Application Components provide standard APIs for accessing and manipulating business objects such as Customers, Resources, and Tasks.

The Oracle Common Application Components business APIs facilitate the integration of the CRM suite in heterogeneous Information Technology environments where integration with legacy or third party applications is essential.

1.2 Oracle Common Application Components Overview

Oracle Common Application Components’s purpose is to provide the CRM suite with a robust architecture, a stable and performing technology stack, and reusable application components.

The following Oracle Common Application Components include:

- Resource Manager
- Notes
- Development Tools
- Assignment Manager
- Task Manager
- Calendar (HTML and Forms-based)
- Escalation Manager
- Business Rule Monitor

Resource Manager

Resource Manager is a single repository for defining teams and groups of people. Once an entity is defined as a resource, it becomes visible to the entire CRM suite, and tasks and calendars, for example, can be associated to this entity.

Notes

The entire CRM suite uses the notes infrastructure to create, maintain, and share notes related to customers, opportunities, service requests, and other business objects.

Development Tools

Oracle Common Application Components include several user interface components that can be embedded in an Oracle form and used by the other CRM modules. These components are referred to as development or infrastructure tools. They are:

- **Gantt chart**, a graphical tool that typically uses a bar chart to show the start date, end date and duration of tasks within the project
- **Spreadtable**, an object that contains rows, columns, and column headers set in a grid

Assignment Manager

The Assignment engine determines the best resource to be assigned to tasks based on availability and skill set. This engine is used by the various CRM modules to automatically assign tasks to a resource or a group of people.

Task Manager

This is the universal model, which is used by the entire CRM suite. Tasks are created and assigned to groups or individuals and are created and shared across CRM through Forms and HTML.

Calendar

There are two Calendars.

- The Forms-based Calendar is a scheduling tool used to define and view available times for a resource or a group of resources. Other CRM modules use the Calendar functionality to schedule resources.
- Employees use the HTML-based Calendar as a personal productivity tool to effectively manage daily activities, appointments, and tasks.

Escalation Manager

You can manage situations either by creating an escalation document, assigning an escalation owner, or defining the necessary actions needed to resolve the escalation through the Escalation Manager interface. This module is used extensively by the service applications to ensure that Service Level Agreements are met.

Business Rule Monitor

You can proactively manage escalations using the Business Rule Monitor which are based on your business logic and needs. It consists of:

- The Business Rule Workbench: this is used to define a business rule
- The Business Rule Monitor: this is the engine that monitors documents over time against the user-defined business rules.

1.3 New in this Release

This release of Oracle Common Application Components has many new features subsequent to the 11.5.8 release. These features are listed by module in the following section.

1.3.1 Resource Manager

Ability to Configure Group and Team Member Notifications

You can configure groups and teams to ensure that group and team members receive notifications. This is accomplished by integrating resources, groups and group members, as well as teams and team members with the relevant Workflow roles.

Publishing Business Events

Resource Manager now publishes events such as creating and importing resources, updating resources, and deleting resources using the Oracle Workflow Business Event System. Applications that contain data directly affected by these events can subscribe to them and sync or modify their data accordingly.

Cascading Product Skill Ratings

Resource Manage provides options for cascading a product skill rating. You can cascade a product rating for all of its components, for only those components that are not already rated, or for none of its components.

Synchronizing End Dates for Employee Resources

Resource Manager enables you to synchronize the end date of an imported employee resource with the original employee resource in the application from which it was imported. The synchronization process also enables you to augment the end date with a unit of time specified in the "Resource active days after termination of source" profile option. This provides additional time to process the termination of the employee resource instead of doing so on the end date.

New Seeded Roles, Roletypes, and Groups

Resource Manager contains the new seeded data to support resources for the following:

- **Oracle Advanced Service Online (AHL)**. The roletype, Default ASO Approver and the role Default ASO Approver support AHL resources.
- **Oracle Lease Contracts (OKL)**. The roletype Contracts, and the roles, Remarketer Team and Contract Portfolio Team support OKL resources.
- **Oracle Service Contracts**. The group Service Contracts supports Oracle Service Contracts Resources.

1.3.2 Notes

HTML Notes Data Security Rules

HTML Notes module leverages the Application Object Library (AOL) data security model by using the object-oriented concept to allow you to customize the security rules and then grant object level security to users with qualifying access privileges.

In general, HTML Notes module provides the following security access if users are granted with these access privileges:

- Ability to view a note
- Ability to create a note
- Ability to update a regular note
- Ability to update a large note
- Ability to update a note's secondary information including note type, status, relation (relate to) and attachment
- Ability to restrict "note type" list of values

Query Notes by "Source" and "Related To" in Forms

Like the functionality in the contextual HTML Notes, the Forms-based Notes module now adds two new radio buttons that enable users to view notes by either "Source" or "Related To."

By default, the "Source" radio button is selected to show all notes associated with the source from where the note is created. If the "Related To" button is selected, then the Notes window will query all notes associated with the source to which the current source is related.

Dynamic Exclusion of Inactive JTF Objects List of Values

Task Manager and Notes now allow unwanted resources or parties to be dynamically excluded from the resource list of values, such as the Relate To field if based on resources. For example, when relating a note to a party, the Relate To drop-down list returns all active parties. All inactive parties will be dynamically excluded from the Relate To list of values.

This functionality is enhanced by adding an extra column "INACTIVE_CLAUSE" to the JTF_OBJECTS table which dynamically filters out inactive data for the objects.

1.3.3 Assignment Manager

Ability to Configure Color Coded Tasks

When implementing or administering Assignment Manager, you can now configure color coded tasks. Assignment Manager stores seeded color data in a color configuration table. You can modify the seeded color data stored in this table or create your own custom colors. Two of Assignment Manager's default colors, however, are hard coded and cannot be modified.

Customizable UI

Assignment Manager is used by different applications each of which generally requires a limited subset of its total available fields and options. For this reason, when implementing Assignment Manager, the implementor or system administrator can customize its UI based on their application requirements. The Assignment Manager UI can be customized to meet the individual requirements of the following applications:

- Tasks
- Service Requests
- Service Request Tasks
- Escalations

Assignment Manager stores seeded UI configuration data for each document type in a configuration table. In addition to modifying this data as required, you can also create new document types that retain default Assignment Manager UI.

Task Labels Appear in GANTT Chart

In addition to displaying color coded tasks, the GANTT Chart now displays task labels. When you view a resource in Assignment Manager, information for that resource including its assigned tasks is displayed in the GANTT chart.

Setting Up Enhanced Planning Options

Assignment Manager enables you to configure time planning options that use the SYSDATE and TIME functions to indicate the start of a shift instead of defaulting to the task's start date. This is useful in situations where the task's start date precedes the date and time in which the shift is assigned and consequently predates the resource's shift assignment. Enhanced planning options are configured using the JTFAM:Use systime for Assignments profile option which is set to Yes or No at the site level. When set to Yes, the profile option enables the SYSDATE and TIME functions to determine the start of a shift. When set to No, the profile enables the task start date and time to represent the start of a shift.

Gantt Chart Displays Overlapping Task Bars

The Gantt chart has been enhanced to visually indicate when a resource has more than one task assigned at the same time. Overlapping tasks are now displayed in a staggered fashion that provides a clear indication of when resources are assigned multiple tasks at the same time.

Gantt Chart Contains New Views or "Time Modes"

The Gantt chart contains a new "six-hour" and a "three hour" view. Right clicking in the date section of the Gantt view can change the "Time mode". This enhancement enhances the Gantt chart's usability by enabling the timescale to be changed with greater precision. Major and minor time ticks are additionally displayed in a more consistent, readable fashion.

User Level Profile to determine the default view in the Gantt Chart

The Gantt chart now recognizes a user level profile option that determines the initial Time Mode used in the Gantt. This profile option sets the default view for Assignment Manager. The default setting is the "day" mode.

Gantt Chart Provides Limited Keyboard Support

Keyboard support has been added for navigation within the resource section of the Gantt chart. Standard forms keyboard accelerators (commit, help, popup menus etc) are now recognized.

1.3.4 Tasks

HTML Task Data Security Rules

HTML Task Manager leverages the Application Object Library (AOL) data security model by using the data object oriented concept to replace hard-coded security rules. This way, data entered in Tasks can be further protected from accessible to the finest data security level. Task security rules can be easily customized and then granted to appropriate users with right access privileges. This functionality only applies to the HTML Tasks, not the Forms-based Tasks.

In general, HTML Task Manager provides the following data security rules in addition to supporting existing task rules:

- Security access to stand-alone tasks and contextual sensitive tasks

  Task Manager supports existing rules used for stand-alone and contextual sensitive tasks. Additionally, with the new security rules, users can be further granted with access privileges (full access or read only) for tasks with certain attributes, such as non-private tasks. To support backward compatibility, your system administrator can turn the new security rules on or off by using the *Task Manager: Set Context Data Security* profile option. When new security rule is enabled, "who has what permissions to access which task objects" is determined by the granted privileges.

- Security rules in granting resource list of values (LOV) access

  The resource LOV can be secured and granted to an individual resource, all members of a group, or all resources. For example, if all members of a marketing group are assigned to Nancy Smith, then she will only see those marketing group members displayed in the resource list of values.

- Security rules in granting group managers access privileges to their subordinate's non-private tasks

  Based on the group hierarchy defined in Resource Manager, each manager can have full access or read only privileges to his or her subordinate's non-private tasks if necessary privileges are granted to managers. In addition, this manager-directs security access only covers one level below. It does not include any multiple levels beneath.

Dynamic Exclusion of Inactive JTF Objects List of Values

Task Manager and Notes now allow unwanted resources or parties to be dynamically excluded from the resource (or source values) list of values. For example, an inactive employee will be dynamically excluded from the resource list of values, so that a task will not be assigned to an inactive employee.

This functionality is enhanced by adding an extra column "INACTIVE_CLAUSE" to the JTF_OBJECTS table which dynamically filters out inactive data for the objects.

Prevention of Duplicate References for Tasks

When a task is created with a resource of category party either as the customer, owner, or assignee, additional party references are also created and visible in the Tasks. If the party type is Source, then one reference for that source will be created. If the customer type is Person or Organization, then one reference for that person or organization will be created. If the customer type or resource type is Relationship, then three associated party references will be created:

- The relationship itself (such as Jeff Walsh at Oracle Corporation)
- The party who is the subject of the relationship (Jeff Walsh)
- The organization which is the object of the relationship (Oracle Corporation)

If a task is created for Oracle Corporation and has the same resource, Jeff Walsh, listed twice as the customer contact, then the references of both the relationship and the party are also generated twice.

To prevent the duplication of party references created for tasks, Task Manager makes the following enhancements:

- If a user manually adds any duplicate references in the Forms-based or HTML Tasks, then an error message will appear stating that the reference already exists.
- If calling modules call the JTF_TASK_REFERENCES_PUB. Create_References ( ) or JTF_TASK_REFERENCES_PUB.Update_References ( ) API that leads to the creation of duplicate references, then the system will ignore the duplicated references.

Users can manually delete existing references that are shared by one or more attributes without problems. For example, if you delete a customer contact name "John" for Oracle Corporation, then system will automatically delete the contact "John" as well as the relationship information "John at Oracle Corporation", but it will leave the organization "Oracle Corporation" unchanged in the system.

A New Search Criterion for Escalated Tasks Appears in the Find Tasks Window

A new search criterion, the **Show Only Escalated Tasks** check box, is now added in the Find Tasks window in Task Forms. This allows users to search for escalated tasks of all escalation levels if the check box is selected.

A New Alert Appears While Trying to Update Customer Information

Whenever a user tries to update customer information for an existing task in both Forms-based and HTML Tasks, a new warning message appears stating "The customer for this task will change. Changing the customer will remove the existing contacts for this task."

After user confirms this change, the customer name and number will be updated, and the contacts and contact points for the former customer will be removed from that task. Therefore, the user must then select new contacts from the newly added customer for that task. If user declines this change after seeing this message, then there should be no change to the original customer.

Enhancements in the Task Template Groups Setup Window

Task Manager has the following enhancements in the Task Template Group setup screen:

- **Two Descriptive Flexfields Are Available**

Task Manager adds two new Descriptive Flexfields (DFF) in the task template setup screen which enables users to enter predefined flexfield information while defining task templates or template groups.

These two new descriptive flexfields are:

  – **Task Templates additional information.** This flexfield located in the Related Task Templates region is used for the task template. Its values can be passed to the tasks that are created based on the task template.

  – **Task template groups additional information.** This flexfield located in the Template Groups region is used for the template group; therefore, its values are stored in the template group and will not be passed to tasks.

- **Task Type and Priority List of Values Are Based on Selected Document Type**

When you define individual task template for a task template group, the available task Type and Priority list of values selection should be restricted by the selected document type for your template group. For example, if a template group is created for Service Request, then you should see only the service request related task types and priority information listed in the drop-down while defining task template attributes.

Only Display Mapped Task Types and Mapped Task Priorities

When selecting a task type and a task priority from the list of values, you can only see the task types and the task priorities that are mapped to your source object displayed in the list of values. Any unmapped task types and unmapped task priorities to your source object are now dynamically excluded from the lists. In addition, if none of the types or task priorities is mapped to your source object, then you will see all task types and priorities from the list of values.

It is important to note that this enhancement changes the available task types and priorities shown in the list of values. In the past, you can see all your mapped task types or mapped priorities, AND other unmapped types or unmapped priorities that do not have any source object attached to them. Now, only the mapped task types and mapped priorities will be displayed in the list of values. All other unmapped types or priorities will not be in the list.

Therefore, any user-defined task types or priorities need to be mapped to your source object; otherwise, you will not see them from the list after defining them.

How to map task types and task priorities, see Defining Task Types and Defining Task Priorities sections in the *Oracle Common Application Components Implementation Guide*.

Change Task "Name" to "Subject" Both in Forms and HTML Tasks

To better describe the purpose of a task creation and to alleviate possible confusion, Task Manager uses "Subject" as the field name to replace the task "Name" field in both Forms-based and HTML Tasks. The field name change propagates throughout Task Manager, in every place where the field is exposed. This includes the Forms and HTML Task screens as well as those owned by Service, Telesales, Customer Care, UWQ, Dispatch, Sales Online, Contact Center, Field Service Laptop, and Field Service Palm. To get the revised task "Subject" field title in the UIs owned by other products, please consult product-specific documentation for details.

Please note that after this replacement, task behavior should be the same as it was before. No other change should be expected.

Deletion of Personal Saved Search Records

Task Manager adds the Delete button in the personalized Saved Searches window that allows you to delete saved search records. After deleting existing saved searches, users are directed to the Task Search screen with a confirmation message. Only the seeded "My Open Tasks" saved search is not deletable. If users attempt to delete the seeded query "My Open Tasks", then an error message will be displayed on the screen.

Deletion of Existing HTML Tasks

Task Manager adds the Delete button in the Task Details window for the HTML Tasks. This allows users to view the task details first and then decide wether or not to delete the task. Once a task is deleted, users are taken to the Task Summary window with a confirmation message.

Support Spreadtable Query Changes in Task Forms' Spreadtable

In order to show only tasks with a specific task type (task_type_id) displayed in the JTF_TASKS spreadtable for the Forms-based Tasks, Task Manager modifies the where_clause constructed for Forms to include the where_clause set for the Tasks form (Data Source Name: JTF_ TASKS) in the Metadata definition for spreadtable. As a result, the where_clause set for spreadtable will not be overridden by the where_clause constructed for the Forms.

Provide Color Data in a Table for Assignment Manager

In order for Assignment Manager to configure color-coded tasks, Task Manager now provides seeded color data in a color configuration table that stores a color for a given combination of Task Type, Task Priority, and Task Assignment Status. The color configuration table may also store additional color coding information that are defined by customers. The additional color codes must be stored in all three color formats supported by the table: Hex, RGB, and Decimal.

How to configure color coded tasks, see Assignment Manager in the *Oracle Common Application Components Implementation Guide*.

Task Manager Has One New Profile Option

Task Manager uses profile option *Task Manager: Set Context Data Security* to control task data security for the context sensitive tasks. It allows your administrators to turn the task security rules on or off based on your business needs.

For more information on this profile option, see Appendix A: Profile Options.

1.3.5 Calendar

Display of Calendar Events in HTML Calendar

In addition to scheduled appointments and tasks, HTML Calendar provides the ability to allow users to view calendar events, such as campaigns, on their calendar views.

In order to use this functionality, the integrated applications have to perform the following tasks:

1. Identify resource groups to which they would like to publish events and add CALENDAR_ITEMS usage to the groups.
2. Make sure that business objects (known as events in calendar) that are published are valid JTF_OBJECTS with all the following metadata defined:
   - SELECT_NAME
   - SELECT_ID
   - FROM_TABLE

- OBJECT_CODE
- WHERE_CLAUSE
- WEB_FUNCTION_NAME
- WEB_FUNCTION_PARAMETERS
- WEB_HTML_CALL

3. Populate the JTF_CAL_ITEMS_B table using the JTF_CAL_ITEMS_PUB API.

In order to view the calendar events in the personal calendars, calendar users must meet the following conditions:

- Users must belong to resource groups to which the event is published.
- Users must have the "Display Events" set to yes in the calendar personal preference page from the Profile navigation link.
- Users must further personalize how these calendar items will be displayed in their personal calendars by selecting the desired color and prefix text.

This feature will work only when integrated applications implement the functionality and follow the required steps.

Oracle Marketing Online (OMO) is one of the applications that is currently implementing this functionality. Please refer to *Oracle Marketing Online Implementation Guide* for more details.

Ability to Differentiate Appointments from Tasks

The Calendar Personal Preferences page now allows you to choose desired color from drop-down list and to enter prefix that you wish to display in your calendar for appointments, tasks, and calendar items (like Marketing objects).

This functionality is similar to the Group Calendar Subscription page to have different color or prefix selected for your subscribed group calendar events. The prefix can have up to 20 characters.

Appointment Drill Down Security Access

HTML Calendar provides the following security access for notes attached to an appointment:

- Owner of the appointment can have full access (view, update, and delete) to the notes created by him.

- Invitees can have full access to the notes created by the appointment owner in the appointment accept or reject page.
- When a searched note has a source of appointment and you are not the owner or the attendee of the appointment, you will see a message "You do not have permission to access this page." displayed when trying to access the note.

Since the HTML Notes module leverages the Application Object Library (AOL) data security model to provide new security rules, it may change the behavior of accessing Notes from appointment drill down screens depending on the security rules setup in Notes.

See HTML Notes Security Rules section, Data Security for HTML Notes chapter in the *Oracle Common Application Components User's Guide* about the notes security access.

Previous and Next Months Dates and Tasks Displayed in The Current Month's Calendar Monthly View

Calendar users now can view the last days of the previous month and the first days of the upcoming month displayed in the current month's calendar monthly view but in gray color. In addition, if any tasks and appointments are scheduled within these previous and next months, then users can also see them shown in the current month's calendar monthly view.

For example, the monthly view of October 2002 displays not only the appointments and tasks for October 1 to October 31, but also the tasks and appointments of previous month September 29, 30 and next month November 1 and November 2 in gray.

Group Calendar Appointments Cannot Be Private

HTML Calendar makes some enhancements for group calendar by removing the "private" check box in the Create Appointment window if the appointment is created for a group calendar. Therefore, all group calendar appointments are public to the group calendar subscribers.

Show Only Appointment Types Mapped to Object "Appointments"

Similar to the method used to map task types in Task Manager, HTML Calendar uses the same method of mapping desired task types to the object "Appointments" to control the Appointment types that appear in the drop down list. Only those types mapped to the object "Appointments" will be shown in the appointment type drop-down list. If no types are mapped, then all of the types will be displayed in the drop-down list.

How to map task types, see Defining Task Types section in the *Oracle Common Application Components Implementation Guide*.

Public Calendar Description Enhancement

The description information of a public calendar can now be displayed in a wrapped text format if the description is very long.

Confirmation Message Appears at the Same Page Upon Appointment Deletion

Previously, when deleting an appointment, the confirmation message would appear on a blank page and you would have to manually navigate back to the original page where the appointment was deleted. Now, HTML Calendar enhances this usability by showing the confirmation message on the top of the calendar daily view page.

Calendar Privilege Code Modification for Task Security

When a user gives calendar access privilege to another resource, the access for tasks is also given simultaneously. The same functionality applies while revoking the grants. Since Task Manager leverages the AOL data security model, task security can be further customized around granting access to tasks. Granting calendar access to another user will still result in granting task access to the user. However, the access to the tasks can be restricted if additional data security has been implemented for tasks.

In the backend, the data entered into FND_GRANTS table is not compatible with the FND_APIs work. For the purpose of backward compatibility, a new row for the task security is created while the same row for calendar is still kept. Therefore, on every grant, there would be two rows created (instead of one row). The same is true for every revoke. Two rows will be deleted.

See Customizing HTML Task Security chapter in *Oracle Common Application Components Implementation Guide* about customizing task security.

Task Status Transition Rules Applies to the Calendar Datebook

In the past, when creating private tasks in the Calendar Datebook, users can see all task statuses in the Status list of values. Now, the Forms-based Calendar uses the task status transition rules defined in Task Manager to list only the task statuses specified in the transition rule that is associated with a user’s logged-in responsibility. The default value set in the “Task Manager: Default Task Status” profile option should be based on the task status transition rules defined in Task Manager.

For example, if a Service Request transition rule is associated with the Field Service Dispatcher responsibility, then only the user logging with the same responsibility can see all relevant transition statuses displayed in the list of values. Please note that this feature is also available in the previous release.

See Defining Task Statuses and Status Transition Rules section about how to define task status transition rules in Task Manager of the *Common Application Components Implementation Guide*.

1.3.6 GANTT

Optional Startup Mode

GANTT has a new profile option, JTF_GANTT_DEF_TIMELINE_MODE that enables users to choose a startup mode. Available Startup Modes include:

- 15 Minutes Mode
- 30MIN
- Hours Mode
- 3 Hours Mode
- 6 Hours Mode
- Days Mode

1.3.7 User Management

Flexible Address Fields

User Management contains flexible address fields that display the required address fields for different countries on the User Detail page, instead of displaying the same address fields for each country. On startup, address fields are displayed for the default country specified by the new JTA_UM_DEFAULT_ADDRESS_STYLE profile option.

Universal Approver Notifications

Universal approvers now receive notifications when a new approval is required. Previously, universal approvers had to log into the system and query approval requests for their organization to determine whether new approvals were required. This feature requires no additional configuration.

Email Address Functions as User ID

The new profile option, JTF_UM_EMAIL_AS_USERNAME optionally enables user management to also use the email address information as a User ID. When set to Yes, the profile option disables the User ID field on the User Management registration screen. When set to No, the User ID is configured in the same manner as all prior releases of User Management.

New Profile Option: JTA_UM_HIDE_QUICKFIND

The new profile option JTA_UM_HIDE_QUICKFIND optionally hides the Quickfind menu on from users. The quickfind menu is not available to the guest user. When the guest user signs on, the value for this profile option is irrelevant.

New Information is Included in Confirmation Email Messages for Registration, Enrollments, and Password Reset

During the registration process, User Management sends confirmation e-mail messages for User Types, Enrollments, Passwords, and Account Status. These messages now include the following:

- Registration Confirmation: User Type Approval Required
- Registration Confirmation: User Type Approval not required
- Registration Confirmation: User Type Approval required, no enrollments
- Registration Confirmation: User Type Approval not required, no enrollments
- Registration Confirmation for additional enrollments
- Reset Password Notifications
- FND User Account Inactivated Notification

TCA Uptake

TCA enhancements are now included in this release. Both the TCA Relationship Model and the v2 API's will be leveraged by User Management.

Improved Approval Email Messages

New approval workflows have been created to address User Type Approval Required, User Type Approval Notifications, Enrollment Approval Required, and Enrollment Notifications:

- **User Type Approval Required**

These approvals generate workflow e-mails during the User Type requisition process:

– User Type Approval Request
– Reminder: User Type Approval Request
– Fail to Escalate User Type Approval Request

- **User Type Approval Notifications**

  These notifications are sent during the User Type registration process:

  – Primary User Request Approved
  – Primary User Request Rejected
  – Business User Request Approved
  – Business User Request Rejected
  – Individual User Request Approved
  – Individual User Request Rejected
  – Other User Request Approved
  – Other User Request Rejected

- **Enrollment Approval Required**

  These approval notifications are sent during the enrollment requisition process:

  – Enrollment Approval required
  – Reminder: Enrollment Approval Required
  – Enrollment Approval Required (to Primary User Group)-Delegation Privileges available
  – Enrollment with delegation Approval required
  – Reminder: Enrollment with Delegation Approval Required
  – Fail to Escalate Enrollment Request
  – Fail to Escalate Enrollment Request with Delegation Request

- **Enrollment Approval Notification**

  These notifications occur upon approval/rejection for enrollments:

  – Enrollment Request Approved

- Enrollment Request Rejected

2

Before You Begin

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing the Oracle Common Application Components. Topics include:

- Related Documentation
- Installation Verification
- Application Procedures
- Oracle Common Application Components Dependencies

2.1 Related Documentation

You may also want to consult the following documentation:

- *Installing Oracle Applications, Release 11i*
- *Implementing e-Business Suite Applications*
- *Oracle Common Application Components User's Guide*
- *Oracle Common Application Components Technical Reference Manual*

2.2 Installation Verification

Before attempting to run e-Business Suite applications, first verify that you can perform the tasks outlined in the following table. The listed tasks are generic tasks that are typical of all users of the Oracle E-Business Suite. Depending on your business processes, and the modules that you are installing, not every listed task is applicable to your installation.

The following table describes the non Common Application Components tasks that need to be performed, and which Common Application Components require the completion of the task before implementation.

Table 2-1 Application Dependency Checklist

Application	Task	Common Application Components
Application Object Library	1. Create an FND user 2. Assign AOL responsibility to the user 3. Set profile option	▪ Resource Manager ▪ Notes ▪ Spreadtable ▪ Gantt ▪ Assignment Manager ▪ Task Manager ▪ HTML-based Calendar ▪ Forms-based Calendar ▪ Escalation Manager ▪ Business Rule Monitor
Oracle Human Resources	Create an employee	Resource Manager
Oracle Human Resources	Create a new business unit	Resource Manager
Oracle Receivables	1. Create a customer 2. Create a new organization	Resource Manager
Oracle Workflow	Create a workflow with notifications	▪ Resource Manager ▪ Task Manager ▪ HTML Calendar ▪ Notes ▪ Business Rule Monitor ▪ Escalation Manager
Oracle Inventory	1. Define categories 2. Define products and platforms 3. Define unit of measure 4. Define unit of measure classes	▪ Resource Manager ▪ Task Manager ▪ Assignment Manager

Table 2-1 Application Dependency Checklist

Application	Task	Common Application Components
Oracle Purchasing	Create a supplier contact	Resource Manager
Oracle Order Management	Define sales credit types	Resource Manager
Oracle General Ledger	Set up descriptive accounting flexfields	Resource Manager

2.3 Application Procedures

You must be able to complete each of the following non-e-Business Suite tasks successfully for your e-Business Suite applications to work properly. If you are unable to complete a task successfully, then correct the problem before continuing.

2.3.1 Creating an FND User

Perform the following steps to create a FND user in the Application Object Library.

Reference

Oracle Applications System Administrator's Guide, See Chapter 2, Managing Oracle Applications Security

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Security > User > Define**.

Steps

1. In the User window, enter a new user name in the User Name field.
2. Enter a password in the Password field.
3. Re-enter the password for verification.
4. Select the employee's name from the list of Values (LOV) in the Person Field.

5. In the Responsibilities sub-tab, select the CRM HTML Administration responsibility from the drop-down list of values.
6. Save the new user.

To verify that the user setup is successful, perform the following steps:

1. Login to your Personal Home Page as the newly created user.
2. Enter your new password when prompted.

You should now be able to access the Personal Home Page for this user.

Note: For this user to have access to HTML applications, you must set additional profile options as detailed in the Implementing Oracle Common Application Components manual.

2.3.2 Assigning AOL Responsibilities to the User

A responsibility defines an application user's current privileges while working with Oracle Applications. When an application user signs on, they select a responsibility that grants certain privileges, specifically:

- The functions that the user may access. Functions are determined by the menu assigned to the responsibility.
- The concurrent programs, such as reports, that the user may run.
- The application database accounts to which forms, concurrent programs, and reports connect.

You cannot delete a responsibility because this information helps to provide an audit trail. You can deactivate a user's responsibility at any time by setting the End Date to the current date. If you wish to reactivate the responsibility for the user, change the End Date to a date after the current date, or clear the End Date.

After creating the FND User, perform the following steps to assign the user AOL responsibilities.

Reference

Managing People Using Oracle HRMS (US), See Chapter 1, Employee Management

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Security > User > Define**.

Steps

1. With the user information populated in the window, select the Responsibility field in the Responsibilities tab.
2. Select the necessary responsibility from the List of Values (LOV).
3. Define the Effective dates.
4. Save your work.

2.3.3 Setting Profile Options

A user profile is a set of changeable options that affect the way your application looks and behaves. As System Administrator, you control how Oracle Applications operate by setting user profile options to the values you want. You can set user profile options at four different levels: site, application, responsibility, and user.

After creating the FND User, perform the following steps to set profile options.

Reference

Managing People Using Oracle HRMS (US), See Chapter 1, Employee Management

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Security >Profile > System**.

Steps

1. In the Find System Profile Values window, select an appropriate check box for the profile option that you want to set before clicking **Find**.

The System Profile Values window opens with the profile option you searched for.

2. Set an appropriate value for your profile option if the checkbox is selected:

   a. Set the Site value.

      This field displays the current value, if set, for all users at the installation site.

   b. Set the Application value.

      This field displays the current value, if set, for all users working under responsibilities owned by the application identified in the Find Profile Values block.

   c. Set the Responsibility value.

      This field displays the current value, if set, for all users working under the responsibility identified in the Find Profile Values block.

   d. Set the User value.

      This field displays the current value, if set, for the application user identified in the Find Profile Values block.

      You should set site-level default values for any required options after installation of an application. If you do not assign a particular profile option at any of the four levels, that option does not have a default value and may cause errors when you use forms, run reports, or run concurrent requests.

3. Save your work.

2.3.4 Creating an Employee

To successfully run most of the e-Business Suite products, you must first create employee resources within the ERP Human Resource Management System (HRMS) application. Perform the following steps to define an employee for minimal functionality.

Note: If Oracle HRMS is not installed, then you must enter a new employee using the Enter Person form by navigating to **Resource Manager > Maintain Employee > Employee**.

Reference

Managing People Using Oracle HRMS (US), See Chapter 1, Employee Management

Prerequisites

None

Responsibility

US HRMS Manager or US Super HRMS Manager

Navigation

Navigate to **People > Enter and Maintain**.

Steps

1. Click **New** In the find window.

   The People window opens.

2. Enter the following employee information in the appropriate form fields:
   - Last Name
   - First Name
   - Title
3. Select the person's gender from the drop-down list.
4. Select Employee from the type drop-down list.
5. Enter the person's social security number.
6. Save you work.

2.3.5 Creating a New Business Unit

A Business Group is a special class of organization. Every Business Group can have its own set of default values, with its own internal organizations, grades, jobs, positions, payrolls, employees, applicants, compensations and benefits.

Organizations are the basic work structure of any enterprise. They usually represent the functional, management, or reporting groups which exist within a Business Group. Perform the following steps to create a new business unit.

Reference

Oracle Applications System Administrator's Guide, See Chapter 2, Managing Oracle Applications Security

Prerequisites

None

Responsibility

US HRMS Manager or US Super HRMS Manager

Navigation

Navigate to **Work Structures > Organization > Description**.

Steps

1. Click **New** in the Find Organization window.
2. Enter the name for the Organization
3. Select Business Unit from the list of values (LOV) in the Type field.

   The current date populates the From Date field.
4. Enter the Organization location details from the LOV.
5. Save your work.
6. In the Organization Classification region, select the classification from the LOV.
7. Select the Enabled check box.
8. Save your work.
9. Click **Others** for additional information on the classification you selected.
10. Save your work.

2.3.6 Creating a Customer

Perform the following steps to create a new customer, with an address and contact information in the Oracle ERP Accounts Receivables application.

Reference

Oracle Receivables User's Guide, See Chapter 3, Customers

Prerequisites

None

Responsibility

Receivables Manager

Navigation

Navigate to **Customers > Standard**.

Steps

1. In the Find/Enter Customers window, select Person from the Customer Type drop-down list.
2. Enter the name of the customer in the Name column.
3. Click **Find** to ascertain if the customer already exists.

   As this customer does not exist, the New button is enabled in the Decisions window.
4. Click **New**.

   The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.

   The Customer Addresses window opens.
6. Fill in the necessary information. Yellow fields are mandatory.
7. On the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:
   - Usage: Marketing
   - Location: 6op9
   - Primary: Yes
8. On the Contacts: Telephones tab, enter a new contact and phone number.
9. Save your work.

Verify Your Information

To verify that the process worked properly, perform the following steps.

1. Open the Customer-Standard window again.

2. Enter the company name you entered above.
3. Click **Find** to query for the record you created in the Match Results window.
4. If the record is found, click the Contacts: Telephone tab.
5. Place the cursor in the Last Name field.
6. From the menu, navigate to **View > Query by Example > Enter**.
7. Enter the contacts last name as the search criteria.
8. Select **View > Query by Example > Run**.

   If the record for your contact name is populated, then you have successfully created a customer with an address and a contact person for the customer.

2.3.7 Creating a New Organization

Perform the following steps to create a new organization, with an address and contact information in the Oracle ERP Accounts Receivables application.

Reference

Oracle Receivables User's Guide, See Chapter 3, Customers

Prerequisites

None

Responsibility

Receivables Manager

Navigation

Navigate to **Customers > Standards**.

Steps

1. In the Find/Enter Customer window, select Organization from the Customer Type drop-down list.
2. Enter the name of a test corporation in the Name field.
3. Click **Find** to ascertain if the customer already exists.

   As this customer does not exist, the New button is enabled.
4. Click **New**.

The Customer-Standard window opens.

5. On the Address tab, click **New** to create a new address.

   The Customer Addresses window opens displaying the same business purpose table as on the first tab.

6. Fill in the necessary information. Yellow fields are mandatory.

7. On the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:

   - Usage: Marketing
   - Location: 6op9
   - Primary: Yes

8. On the Contacts: Telephones sub-tab, enter a new contact and phone number.

9. Save your work.

2.3.8 Creating a Workflow With Notifications

Perform the following steps to create and run a workflow with notifications.

Reference

Oracle Workflow Developer's Guide, See Chapter 3, Defining a Workflow Process and Chapter 4, Defining Workflow Process Components

Prerequisites

None

Responsibility

Workflow Administrator

Navigation

Navigate to **Workflow > Launch Processes**.

Steps

1. In the Launch Processes window, In the Item Type column, click **Document Management**. If you have renamed the item types, this option appears in the Internal Name column as WFDM.

The Initiate Workflow-WFDM page opens.

2. Enter values in the following fields:
   - Item Key: Enter your name plus a sequence number (for example, jdoe1001)
   - User Key: You may copy the value in the Item Key field
   - Process Name: Enter Document Review
   - Process Owner: Your logged in user name populates automatically
   - Send Document: Leave blank
   - Document Owner: Select a valid resource name
   - Document Reviewer: Choose one from the list of values
   - Comments: Enter Workflow Verification
   - Response Document: Leave blank
3. Click **OK**.

   The Activities List page opens to show workflow statuses. The status of the workflow you just initiated should be Active.
4. If the status of the workflow is Error, click **Exception** in the Result column to see an explanation of the error.
5. Click **View Diagram** to see a graphical representation of the workflow process.

   Leave the View Diagram window open as you continue to check the workflow.
6. Save your work.

To Review the Progress of a Workflow

Use the following procedure to verify that the Workflow notification is sent.

Steps

1. Login to your Personal Home Page.
2. In the list of Self Service Apps, choose the Workflow User Web Application responsibility.
3. In the Navigator, choose **Workflow >Find Notifications**.

   The Find Notifications page opens.

4. In the Type field, enter Document Management. In the To field, enter the document reviewer.
5. Click **Find**.

   The Worklist window opens.
6. Click **Subject** to open the notification.

   If you see the notification, then workflow is set up correctly.
7. Click **Approve** to return to the Worklist window.

Further Verification

You may go back to the View Diagram window that you opened earlier. Click **Reload** in the browser window to refresh the contents of the window. After the workflow process completes successfully, you can see a green line from the Start icon to the End (Approve) icon.

2.3.9 Defining Categories

You can use categories and category sets to group items for various reports and programs. Perform the following steps to define categories.

Note: Category sets may be used as a means to develop custom lists of items on which to report and sort. You can also create other category sets such as John's Priority or Jane's Priority, with categories like high, medium, and low.

Reference

Oracle Inventory User's Guide, See Chapter 4, Item Setup and Control

Prerequisites

The categories you assign to a category set must have the same flexfield structure as the set itself. This is true even if you choose not to validate the category list.

Responsibility

Inventory

Navigation

Navigate to **Setup > Items > Categories > Category Sets**.

Steps

1. Select the appropriate organization name in the Organization window, if necessary.
2. In the Category Sets window, enter a unique category set name and description information.
3. Enter a flexfield structure.
4. Select a control level.
   - Master Level: Item assigned to this category set has the same category value in all organizations where it is assigned.
   - Org Level: Item assigned to this category set may have a different category value in each organization where it is assigned.
5. Select a default category.

   This is the default category used when assigning an item to the category set. For example, a category set may have a default category called New. After an item is assigned to New, you can override the default category and choose another relevant category for each item.
6. Decide whether or not an item can be assigned to multiple categories within this category set.
   - Enable: You can assign an item to multiple categories within a category set. For example, you may define a Hazard category set. In this case, an item may be assigned to both the Poison and Corrosive categories.
   - Not Enable: You can assign an item to exactly one category. For example, you may define a Web Display category set. In this case, an item can be assigned to only one default display category.
7. Decide whether or not to enforce the list of valid categories.
   - Enable: You can assign an item only to those categories defined as valid categories for this category set. For Oracle Purchasing, this check box is not applicable, and you can assign items only to categories defined as valid for this category set.
   - Not Enable: You can assign an item to any defined category that uses the same flexfield structure as this category set.

8. Select a list of valid categories.

   The list of values here includes only categories that use the same flexfield structure as the category set you are defining.

9. Save your work.

2.3.10 Defining Products and Platforms

You define and rate products and platforms in Oracle Inventory in order to set resource skill levels in the HTML Resource Manager. See the *Oracle Inventory User's Guide*, See Chapter 5, Items for more information on how to define products and platforms.

Reference

Oracle Inventory User's Guide, See Chapter 5, Items

2.3.11 Defining Unit of Measure Classes

Perform the following steps to define a unit of measure class.

Reference

Oracle Inventory User's Guide, See Chapter 3 Units of Measure

Prerequisites

None

Responsibility

Inventory

Navigation

Navigate to **Setup > Units of Measure > Classes**.

Steps

1. In the Units of Measure Classes window, select **File > New**.
2. Enter a unique name for the unit of measure class.
3. Enter a description for the UOM class.
4. Define the base unit of measure for this class.

5. Enter a unique abbreviation for the unit of measure with a maximum length of three characters. Examples include, EA for each or HRS for hours.
6. Select the "inactive on" date from the date picker.
7. Save your work.

2.3.12 Defining Units of Measure

Units of measure are used by a variety of functions and transactions to express the quantity of items. The values defined in the Units of Measure window provide the list of values available in unit of measure fields in other windows. Units of measure are not organization–specific. Perform the following steps to define units of measure.

Reference

Oracle Inventory User's Guide, See Chapter 3 Units of Measure

Prerequisites

At least one unit of measure class must exist.

Responsibility

Inventory

Navigation

Navigate to **Setup > Units of Measure > Units of Measure**.

Steps

1. With the Units of Measure window open, select **File > New**.
2. Enter a unique name for the unit of measure.
3. Enter a unique abbreviation for the unit of measure with a maximum length of three characters. Examples include, EA for each or HRS for hours.
4. Enter a Description for the UOM.
5. Select the check box if this is the base unit of measure for the unit of measure class.
6. Enter a unit of measure class.
7. Select an "inactive on" date from the date picker.

8. Save your work.

2.3.13 Creating a Supplier Contact

Set up suppliers in the Suppliers window to record information about individuals and organizations from whom you purchase goods and services. You can also enter employees whom you reimburse for expense reports. When you enter a supplier that does business from multiple locations, you store supplier information only once, and enter supplier sites for each location. You can designate supplier sites as pay sites, purchasing sites, RFQ only sites, or procurement card sites. For example, for a single supplier, you can buy from several different sites and send payments to several different sites. Most supplier information automatically defaults to all supplier sites to facilitate supplier site entry. However, you can override these defaults and have unique information for each site.

The system uses information you enter for suppliers and supplier sites to enter default values when you later enter transactions for a supplier site. Most information you enter in the Suppliers window is used only to enter defaults in the Supplier Sites window. When the system enters that information in a later transaction, it only uses supplier site information as a default, even if the supplier site value is null and the supplier has a value. If you update information at the supplier level, existing supplier sites are not updated.

When you enter a supplier, you can also record information for your own reference, such as names of contacts or the customer number your supplier has assigned to you. Perform the following steps to create a supplier contact.

Reference

Oracle Public Sector Purchasing User's Guide, Chapter 5, Supply Base Management

Prerequisites

- Verify that the supplier does not exist in the system. Use the Suppliers Report and Supplier Audit Report.
- Define the following lookups in the Oracle Purchasing Lookups window: Pay Group, Supplier Type, Minority Group.
- Define Supplier Types in the Oracle Payables Lookups window.
- If you have installed Purchasing, complete Purchasing setup.
- If you use Oracle Purchasing, define Supplier Types in the Oracle Payables Lookups window.

- If you use Oracle Purchasing, define FOB codes, Minority Groups, and Freight Terms codes in the Oracle Purchasing Lookups window.
- If you use Oracle Purchasing, define Ship Via codes in the Defining Freight Carriers window.

Responsibility

Purchasing

Navigation

Navigate to **Supply Base > Suppliers**.

Steps

1. In the Suppliers window, enter a unique Supplier Name.
2. If the Supplier Number Entry option in the Financials Options window is set to Automatic, Payables automatically enters a Supplier Number for you. If this option is set to Manual, you must enter a unique Supplier Number.
3. (Optional) Enter the supplier's tax identification number in the Taxpayer ID field; for example, an individual's social security number, or a corporation or partnership's federal identification number/federal tax ID.
4. (Optional) Enter the value-added tax (VAT) registration number in the Tax Registration Number field if you are entering a VAT supplier.

   If you want to prevent invoice or purchase order entry for this supplier after a certain date, then enter the date in the Inactive On field.
5. Enter supplier information in the appropriate tabs of the Suppliers window.
6. In the Suppliers window, choose the Sites button to navigate to the Supplier Sites window. Enter at least one supplier site name and address.
7. Save your work.

2.3.14 Defining Sales Credit Types

Order Management uses sales credit types to determine if the sales credit for an order is a quota or non-quota amount. Perform the following steps to define sales credit types.

Reference

Oracle Order Management User's Guide, See Chapter 1, Setting up

Prerequisites

None

Responsibility

Order Management Super User

Navigation

Navigate to **Setup > Sales > Credit Types**.

Steps

1. Navigate to the Sales Credit Types window.
2. In the Sales Credit Type window, enter the Credit Type Name and Description for the credit type.
3. Select the Quota check box if the sales credit type applies to revenue quota sales credit that you assign to salespeople.
4. Select the Enabled check box to activate the sales credit type.
5. Save your work.

2.3.15 Setting Up Accounting Flexfields

Use descriptive flexfields to tailor General Ledger to fit your unique information needs. For example, you may want to collect additional information on budget organizations, such as the manager and the size of the organization. You can even define context–sensitive flexfields that prompt you for additional information based on your previous entries. Perform the following steps to set up accounting flexfields.

> **Note:** You only need to set up accounting flexfields if you are using the Freight, Revenue, or Receivables Account fields, in the Resource Manager Receivables tab.

Reference

Oracle General Ledger User's Guide, Chapter 9, Setup

Prerequisites

Use the Value Sets window to define any value sets you need.

Responsibility

General Ledger Super User

Navigation

Navigate to **Setup > Financials > Flexfields > Descriptive > Segments**.

Steps

Consult the following manuals for more information:

- *Oracle General Ledger User Guide*
- *Oracle Applications Flexfields Guide*

2.4 Oracle Common Application Components Dependencies

Oracle Common Application Components integrates with other Oracle applications in the e-Business Suite to provide and extend its functionality. Some are mandatory and some are optional. You must set up the mandatory modules before the Common Application Components can run. Setting up the optional modules is not required; however, if they are not set up, then the additional functionality provided by these modules is not available.

Many of these modules are included in your general installation. The following list of modules or applications is included with your installation but if you have not licensed the entire suite, you will only have access to the functionalities and tables. In other words, you will not be able to access the user interface (UI) or APIs for the application.

> **Note:** The exception to the previous paragraph is that some UIs are shared. An example of this is in Oracle HRMS which will "share" some of it's Forms if you do not have HRMS set up.

For information on Oracle E-business Suite Release 11*i* system requirements and dependencies, consult the Oracle Applications *Installing Oracle Applications Release 11i* manual.

2.4.1 Mandatory Dependencies by Module

2.4.1.1 Resource Manager

- **Oracle Application Object Library (AOL)**: Resource Manager uses AOL to manage responsibilities that are used in various modules, and set application profile options. (Required)
- **Oracle Human Resources:** Resource Manager uses Oracle Human Resources to create employee resources so that the employee resources can be imported into Resource Manager. In addition, business units used in multi-organization are also created in Oracle Human Resources. (Required)
- **Oracle Purchasing**: Resource Manager uses Oracle Purchasing to create supplier contacts. (Required)
- **Oracle Inventory**: HTML-based Resource Manager users rate their skills based on the product and platforms defined in Oracle Inventory. (Required)
- **Oracle Receivables**: Resource Manager uses Oracle Receivables to create customers that are of party or partner resource type. In addition, new organizations used in multi-organization are also created in Oracle Receivables. (Required)
- **Oracle Workflow**: Resource Manager uses Oracle Workflow to send workflow notifications. (Required)

2.4.1.2 Notes

- **Oracle Application Object Library (AOL)**: Notes uses AOL to set necessary profile options and uses the AOL lookups window to create new note types. (Required)

2.4.1.3 Spreadtable

- **Oracle Application Object Library (AOL)**: Spreadtable uses AOL to set necessary profile options. (Optional)

2.4.1.4 Assignment Manager

- **Oracle Application Object Library (AOL)**: Assignment Manager uses AOL to set application profile options that are used in various modules.
- **TCF Server:** It must be running and correctly configured to connect to Scheduler and for Gantt charts to display information and render properly. (Optional if Window to Promise and Intelligent options are used.)

- **Oracle 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. These two resource assignment options are used primarily for service requests in Field Service. (Optional)
- **Territory Manager**: Assignment Manager uses Territory Manager to retrieve qualified resources identified in a territory. (Optional)
- **Forms-based Calendar:** It is used to provide the availability of qualified resources. The Forms-based Calendar provides the work shift information for a resource. (Optional)
- **Oracle Contracts:** Assignment Manager uses Oracle Contracts to retrieve preferred engineers defined in Contract. (Optional)
- **Service Request:** Assignment Manager uses Service Requests primarily to have a resource assigned by the Intelligent and Window to Promise assignment options. (Optional)
- **Installed Base**: Assignment Manager uses Installed Based to retrieve preferred engineers defined in Installed Base. (Optional)

2.4.1.5 Task Manager

- **Oracle Application Object Library (AOL)**: Task Manager uses AOL to manage responsibilities and profile options that are used in various modules. (Required)
- **TCA:** Task Manager uses TCA to locate the customer contact information when creating a task. (Required)
- **Oracle Workflow**: Task Manager uses Oracle Workflow to send workflow notifications in order to notify personnel about task creation and changes. (Required)
- **Notes**: Task Manager uses Notes to create notes attached to a task. (Optional)
- **Resource Manage**r: Task Manager queries Resource Manager to determine the owner and assignee of a resource. (Required)
- **Assignment Manager**: Task Manager uses Assignment Manager to assign qualified resources to a task. (Optional)
- **Escalation Manager**: Task Manager uses Escalation Manager to escalate a task. (Optional)

2.4.1.6 Calendar (HTML-based)

- **Oracle Application Object Library (AOL)**: HTML Calendar uses AOL to create FND users (for example, to create a calendar workflow administrator) with appropriate responsibilities, as well as set necessary profile options. (Required)
- **HTML Tech Stack:** Set up properties in Oracle HTML Stack for debug logging trails and cookie encryption. You also specify default roles and responsibilities for users in this module. (Required)
- **Resource Manager**: HTML-based Calendar queries the Resource Manager tables so that individual resources can make and be invited to appointments. (Required)
- **Tasks**: HTML-based Calendar uses the HTML-based Tasks to create repeating appointments. (Required)
- **Notes**: HTML-based Calendar uses the HTML-based Notes to create a note and attach it to an appointment. (Required)

2.4.1.7 Calendar (Forms-based)

- **Oracle Application Object Library (AOL)**: The Forms-based Calendar module uses AOL to manage responsibilities that are used in various modules. (Required)
- **Task Manager**: The Forms-based Calendar module uses Task Manager to create Todo Lists (tasks). (Required)
- **Resource Manage**r: The Forms-based Calendar module uses Resource Manager to assign resources to a calendar. (Required

2.4.1.8 Escalation Manager

- **Oracle Application Object Library (AOL)**: Escalation Manager uses AOL to set necessary profile options that are used in various modules. (Required)
- **Oracle Workflow**: Escalation Manager uses Oracle Workflow to send workflow notifications to relevant resources when an escalation document is created or updated. (Required)
- **Service Request**: Service requests can be manually escalated through Escalation Manager if necessary. (Optional)
- **Oracle Quality Online (OQO):** Defects created in the OQO (formerly known as the Defect Management System) can be manually escalated through Escalation Manager if necessary. (Optional)

- **Assignment Manager**: Escalation Manager queries the escalation territory defined in Territory Manager through the Assignment Manager UI to determine the owner of an escalation. (Optional)
- **Task Manager:** Forms-based Task Manager is used to attach additional tasks to an escalation document. Tasks created in the Forms version can be manually escalated through Escalation Manager if necessary. (Optional)
- **Notes:** The Forms-based Notes module is used to attach additional notes information to an escalation document. (Optional)

2.4.1.9 Business Rule Monitor

- **Oracle Application Object Library (AOL)**: The Business Rule Monitor uses AOL to set necessary profile options that are used in various modules and to create the BRM Workflow Administrator. (Required)
- **Oracle Workflow**: It is used by the seeded workflow processes to send out workflow notifications to relevant document owners. (Required)
- **Service Request**: Service Requests can be monitored and escalated based on your defined business rules. (Optional)
- **Oracle Quality Online (OQO**): Defects created in the OQO (formerly known as the Defect Management System) can be automatically escalated when a business rule is violated. (Optional)
- **Escalation Manager**: It is used by the seeded workflow processes to create an escalated document when a business rule is violated. (Required)
- **Territory Manage**r: It is used to retrieve qualified resources identified in the escalation territories if the identity of a person who receives notifications defined in the Workflow Attributes window cannot be determined. (Optional)
- **Task Manager:** It is used by the seeded workflow processes to create an automated escalation task. This is generated through the seeded Automated Escalation Template Group for Task Manager (Service Request or Oracle Quality Online) defined in the Forms-based Task Manager. Tasks created in the Forms version can also be automatically escalated when a business rule is violated. (Optional)

Part II

Resource Manager

This part of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Creating and Importing Resources
- Managing Resources
- Managing Roles and Role Types
- Managing Teams and Groups
- Managing Reports
- Troubleshooting Resource Manager

3

Implementation Overview

This chapter provides an overview of the Resource Manager implementation process. Topics include:

- Overview
- Phase I: Setting Up Resource Manager
- Phase II: Managing Resources

3.1 Overview

Resource Manager is used with other applications in the e-Business suite to define, access, and maintain different categories of resources including employees, supplier contacts, parties, and partners. Resource Manager enables you to perform these functions in a single application without having to access multiple repositories within the e-Business suite on an individual basis. Implementing Resource Manager takes place in two phases. In the first phase, you set up Resource Manager by importing resources from other e-Business applications, optionally defining roles and role types, setting profile options, configuring resource fields for update, and defining skill levels. In the second phase, you manage resources by finding and viewing resources, assigning roles and role types to resources, creating groups and teams to which resources can be assigned, and viewing resource reports. In addition to successfully completing these phases, you can troubleshoot any problems with Resource Manager as required. Before implementing Resource Manager, it is necessary to understand the definition of resources, how Resource Manager operates with other e-Business suite applications, and the functionality of both the Forms-based and HTML versions of the product.

3.1.1 Resources

Resources are people who are identified by categories based on the business function they perform. These categories include employees, parties, partners, and supplier contacts each of which is initially created and maintained in a specific e-Business application database. Resource Manager typically mass imports different types of resources from the following e-Business application databases:

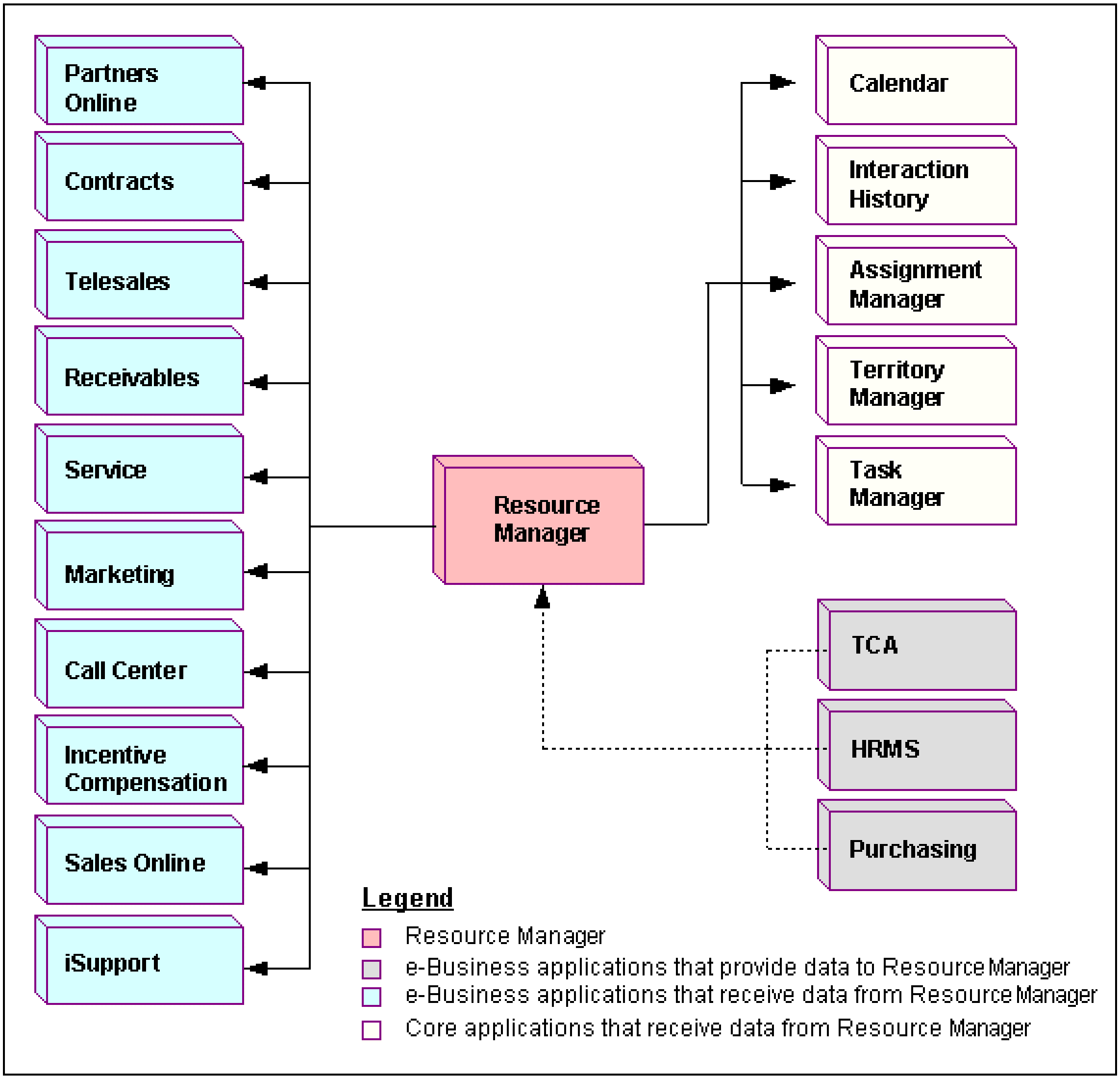
E-Business Suite Application Resources

Resource	Description	E-Business Application
Employee	A person hired to work for a company.	Human Resource Management System (HRMS)
Party	An entity that can enter into a business relationship.	Trading Community Architecture (TCA)
Partner	One of two or more people who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits.	TCA
Supplier Contact	The contact information for a person or agency that sells raw material or goods.	Purchasing (PO)

3.1.2 Resource Manager Functionality within the E-Business Suite

Resource Manager imports data from the HRMS, TCA, and PO databases and provides the resulting resource information to other e-Business applications. Figure 3-1 illustrates Resource Manager interactions within e-Business and core applications. This diagram is explained in the table that follows.

Figure 3–1 Interaction with Other E-Business and Core Applications



The following table describes Resource Manager Interactions with other e-Business Suite applications:

Interaction with Other E-Business Applications

Application	Type	Resource Manager Interaction
Partners Online	e-Business	Partners Online uses Resource Manager to setup partners, parties, and relationships from TCA.
Contracts	e-Business	Contracts uses Resource Manager to tie contracts to employees. For example, a service contract may be tied to one or more preferred engineers.
Telesales	e-Business	Telesales uses Resource Manager to set up a sales hierarchy.
Receivables	e-Business	Salesreps defined in Resource Manager are used by Receivables.
Marketing	e-Business	Marketing uses Resource Manager to set up marketing groups, identify approvers, and execute marketing campaigns.
Service	e-Business	Service uses group and team lists of resources from Resource Manager for service request assignments.
iSupport	e-Business	iSupport uses Resource Manager to set up support groups to fulfill service and support needs.
Incentive Compensation	e-Business	Incentive Compensation uses Resource Manager to set up sales representatives and sales compensation group hierarchies.
Call Center	e-Business	Call Center uses Resource Manager for call center routing.
Sales Online	e-Business	Sales Online uses Resource Manager to set up a sales hierarchy.
Calendar	e-Business	Calendar uses Resource Manager to track the availability of resources.
Interaction History	Common Application Components	Interaction History uses Resource Manager to provide touch points.
Assignment Manager	Common Application Components	Assignment Manager uses Resource Manager to provide a list of qualified resources.
Territory Manager	Common Application Components	Territory Manager uses Resource Manager to select the resources for a particular territory.

Interaction with Other E-Business Applications

Application	Type	Resource Manager Interaction
Task Manager	Common Application Components	Task Manager uses Resource Manager to provide single, group, and team lists of resources for task assignments.
Trading Community Architecture (TCA)	e-Business	Resources of category "Party" and "Partner" can be imported from Accounts Receivables (AR) to Resource Manager and subsequently defined as e-Business Suite resources.
Purchasing	e-Business	Resources of category “Supplier Contact” can be imported as resources from Purchasing (PO).
Human Resource Management Systems (HRMS)	e-Business	Resources of category “Employee” can be imported as resources from Oracle Human Resource Management System (HRMS).

3.1.3 Forms-based and HTML Versions of Resource Manager

Resource Manager was initially a Forms-based application and was subsequently expanded to include an HTML version. A number of features are available in both versions of Resource Manager, however some features are available in only Forms or HTML. The HTML version of Resource Manager, has additional implementation requirements such as setting the necessary profile options for the application.

3.2 Phase I: Setting Up Resource Manager

Implementing Resource Manager takes place in two phases. In the first phase, you set up Resource Manager by defining and configuring required components. In the second phase, you use Resource Manager to manage your resources. This section summarizes the basic steps for Phase I: Setting up Resource Manager. Detailed instructions for these steps can be found in the subsequent Resource Manager chapters of the Implementation Guide. Before performing these steps, you should first determine that Resource Manger is installed and configured properly to work with other applications in the e-Business suite.

3.2.1 Defining Resources

The first step in implementing Resource Manager is to define resources. Typically this is accomplished by mass importing resources from other Oracle e-Business applications or from legacy systems. In some cases, however, you may want to define an individual resources by importing it from the relevant e-Business application or by creating it directly in Resource Manager.

3.2.1.1 Mass Import Resource From Other e-Business Applications

Mass importing resources is the most common method of defining resources that are stored in e-Business applications such as HRMS, TCA, or PO. This is accomplished using concurrent programs to synchronize data between Resource Manager and the HRMS, TCA, and PO databases.

3.2.1.2 Import Resources From Legacy Applications Using APIs

APIs are required to import resources from legacy HRMS, PO, or AR systems into Resource Manager. To accomplish this, you must use the APIs of your legacy system and the Resource Manager public Published APIs.

3.2.1.3 Import Individual Resources From Other e-Business Applications

An individual resource can be imported into Resource Manager by logging in with the CRM Administrator responsibility, and selecting Resource Manager > Maintain Resources > Import Resources.

3.2.1.4 Create Individual Resources in Resource Manager

You can create an employee resource in the HTML version of Resource Manager and you can create an employee that is defined as a salesperson in the Forms-based version of Resource Manager. When you create Resources of these types in Resource Manager the information is written directly to the HRMS tables. If you want to create individual resources of other types, you must first create them in the appropriate application and then import them into Resource Manager.

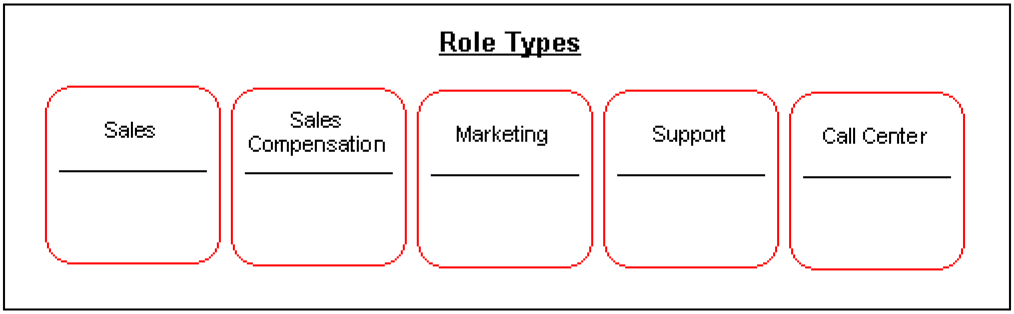
3.2.2 Optionally Defining Roles Types and Roles

Resource Manager comes with seeded role types and roles that are used to better organize your resources. If you do not wish to use the seeded role types and roles, you can optionally create your own in Resource Manager.

3.2.2.1 Role Types

A role type is a broad descriptive category such as "Sales" that contains one or more detailed descriptive categories such as "Sales Representative" or "Sales Manager". Sales, Telesales, Marketing, Sales Compensation, Support, and Call Center are all examples of role types that are seeded by the different modules that access Resource Manager. You can also define custom role types for your business needs.

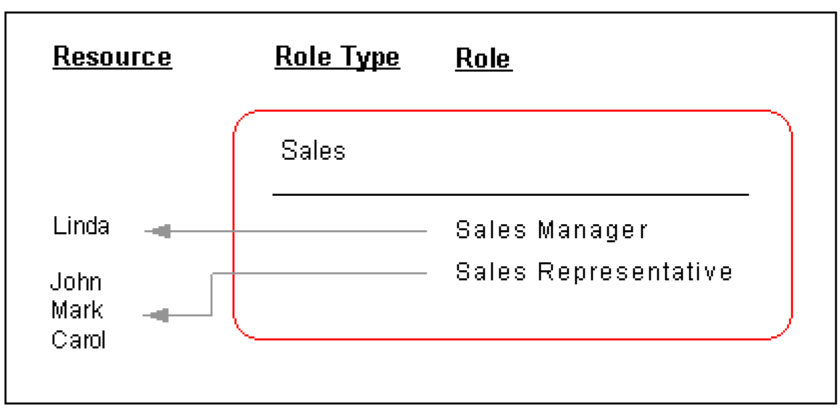
Figure 3–2 Role Types Example



3.2.2.2 Roles

Roles are detailed descriptive categories that are grouped together within role types. A role can encompass one or more job descriptions and job titles that are used to assign responsibilities to resources, groups, and teams. For example, the Sales role type can encompass several roles including Sales Manager and Sales Representative. A resource named Linda who is a Sales manager can be assigned the Sales Manager Role while sales representatives, John, Mark, and Carol are assigned the Sales Representative role.

Figure 3–3 Roles Example



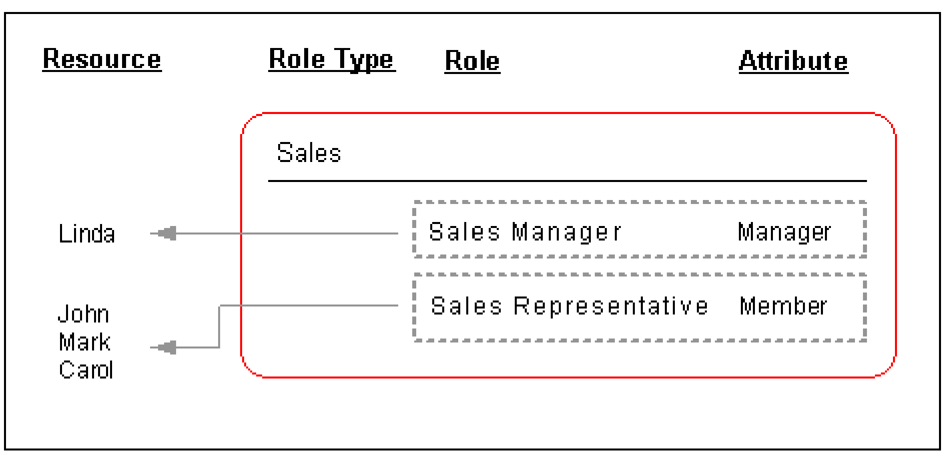
3.2.2.3 Role Attributes

When a role is created, it is associated with a specific role attribute. This enables different roles to be grouped together when defining a resource reporting hierarchy.

The hierarchy is used in sales product families to control data access privileges, sales forecast rollups, and incentive compensation plans. It is also used for workflow notifications and escalations. When defining a role, you must also specify its attribute by selecting one of the Resource Manager seeded role attributes:

- **Member**: This is the attribute for group members and is the default attribute for any group.
- **Lead**: This is the attribute for the team lead within a group.
- **Admin**: This attribute enables group members with the associated role to view and modify information about other group members. In the HTML Resource Manager, only a user in a group with either the Administrator or Manager group member role can update group member and group hierarchy information.
- **Manager**: This attribute is used to set up the group reporting hierarchy. For example, all the forecasts for a group of sales representatives will roll up to the person with the Manager role attribute in that group. If Linda is a sales manager who is assigned the Sales Manager role that is associated with the Manager attribute, then only Linda will receive forecasts for the group. In addition, a user with the Manager group member role can update the group member and group hierarchy information in the HTML Resource Manager.

Figure 3–4 Role Attributes Example



3.2.3 Setting Profile Options for HTML

Profile options must be set for the HTML version of Resource Manager depending on your requirements. These include:

- Employee Resource Update Access
- Group Update Access
- Resource Lookup Audience
- Role Update Access
- Resource active days after termination of relationship

3.2.4 Modifying Resource Fields in HTML

In the HTML version of Resource Manager, the appropriate users or system administrators with the Resource Self Service Administrator responsibility must set up the Define Resource Fields for Update window. This determines which fields for the resource's personal information can be updated and how the update should occur.

3.2.5 Defining Skill Levels in HTML

In the HTML version of Resource Manager, the appropriate users or system administrators with the Resource Self Service Administrator responsibility must set up the Define Skill Levels window. This determines the name of the skill level and its associated numeric value. Once this is specified, an individual resource can select an appropriate skill level from the LOV of the Level field in the Rate Skill window to rate their technical skills. These skill levels are standard regardless of whether the resource is rated at category, product, platform, or problem code level. The numeric values for the related skill levels can be a part of the calculation when selecting the optimal individual for a service request.

3.2.6 Configuring Group and Team Member Notifications

Resource Manager enables group and Team members to receive Workflow notifications. This is particularly useful when important communications are sent to a group or team that require immediate dissemination to all of the their members. For example, if a support group or team receives a high priority service request then all members of the group or team can simultaneously be notified to ensure that immediate action is taken. Resource Manager accomplishes this by integrating resources, groups, group members, teams, and team members with Workflow roles.

When a resource is created or updated, its information, including relevant attributes, is stored in both Resource Manager and the corresponding Workflow role tables. Notifications can only be sent to all group or team members if the group-to-membership or team-to-membership relationship information stored in Resource Manger is in sync with the data stored in the corresponding Workflow role tables. To accomplish this, Resource Manager administrators must run the Synchronize Workflow Roles concurrent program on a periodic basis.

3.2.7 Publishing Business Events

Resource Manager publishes events such as creating and importing resources, updating resources, and deleting resources using the Oracle Workflow Business Event System. Applications that contain data directly affected by these events can subscribe to them and synchronize or modify their data accordingly. For example if a resource that is assigned to a Task is deleted, this action is published or "raised" as a business event. Task Manager, can consequently subscribe to this event and reassign the task to an available resource.

3.3 Phase II: Managing Resources with Resource Manager

After successfully setting up Resource Manager in Phase I, you can proceed to Phase II: Managing Resources with Resource Manager. In this phase, you can optionally find and view resources, modify resources with roles and role types, create groups and teams, view resource reports, sychronize imported resources with updated records in their database of origin, and troubleshoot Resource Manager if required.

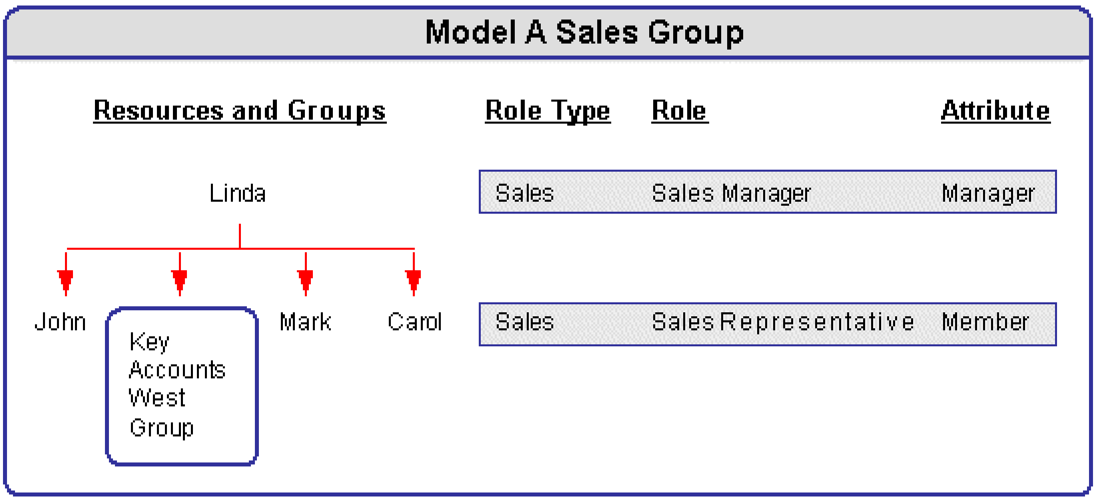
3.3.1 Finding and Viewing Resources

After importing a resource into Resource Manager, you can find and view the resource and manage it by performing any of the actions described in the remainder of this chapter.

3.3.2 Defining Groups

A group is a unit of organization based on the similar function or roles of its members. It can consist of individual resources and resource groups and any resource can belong to multiple groups. For example, a manufacturing company has sales groups for different product models. A sales manager named Linda, leads the Model A Sales Group and has three sales representatives, John, Mark and, Carol who report directly to her. The Model A Sales Group can also contain another resource group, Key Accounts West Group that handle sales in the west region for model A, and whose members also report to Linda.

Figure 3–5 Groups Example



3.3.2.1 Group Member Roles

Roles and responsibilities can be associated with all members of a resource group. For example, Linda is a sales manager; John, Mark, and Carol are sales representatives. The Sales Manager and the Sales Representative are job roles assigned to the Model A Sales Group. Each member can have multiple roles defined within a group or among groups. If the Key Accounts West Group only contains two resources, one of them can perform two roles, sales manager and field sales agent Or while Linda, the manager in the Model A Group, may also be a member of a group called Model B Group.

3.3.2.2 Group Usage

Group usage must also be specified. For example, the Model A Group can be used in Sales Compensation, Sales, and Telesales.

3.3.2.3 Dynamic Groups

Instead of assigning each individual or group resource to an existing group, you can create a dynamic group based on the criteria you define in SQL statements. For example, Oracle Interaction Center's Telephony Manager uses Dynamic Groups for skill-based routing. In active mode, Oracle Telephony Manager routes calls according to defined rules. The active mode is the default mode of operation. In active mode, Oracle Telephony Manager uses skill-based routing, a dynamic call routing intelligence that delivers inbound calls to an agent who is appropriately skilled to meet the needs of the caller. When inbound calls arrive at the switch, the switch issues a routing request. Oracle Telephony Manager monitors the routing request, then applies skill-based routing rules, and identifies suitably skilled agents. Meanwhile, a representation of the call waits in the virtual queue within Oracle Telephony Manager. When a suitable agent becomes available, Oracle Telephony Manager responds to the routing request and instructs the switch to deliver the call to the agent's extension through the Universal Work Queue (UWQ), where more specific pre-defined rules may apply in directing the call. In a dynamic group, the database automatically updates information about individual group members (dynamic routing executes the workflow/procedure to get an agent list).

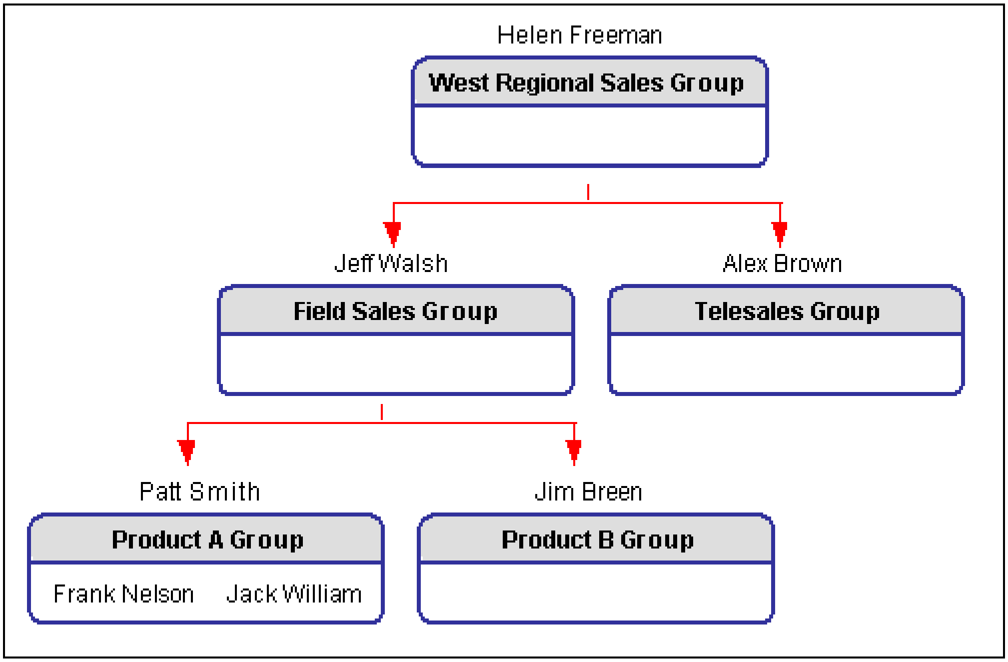
3.3.2.4 Group Hierarchy

Because individual resources can be assigned to a group, and a group can belong to another group or to multiple groups, resources can be organized in 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 report directly to Pat Smith, the sales manager of Product A; but they report indirectly 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. For example, you can search for direct reporting information for the employee Jeff Walsh based on the above group hierarchy. You can see Pat Smith and Jim Breen listed as the results for direct reporting. Jack William and Frank Nelson are added to the list if it is for all the reporting information due to the parent-child relationship between these groups.

Figure 3–6 Group Hierarchy Example



3.3.2.5 Group Member Notifications

You can configure groups to receive notifications to ensure that important communications reach all group members.

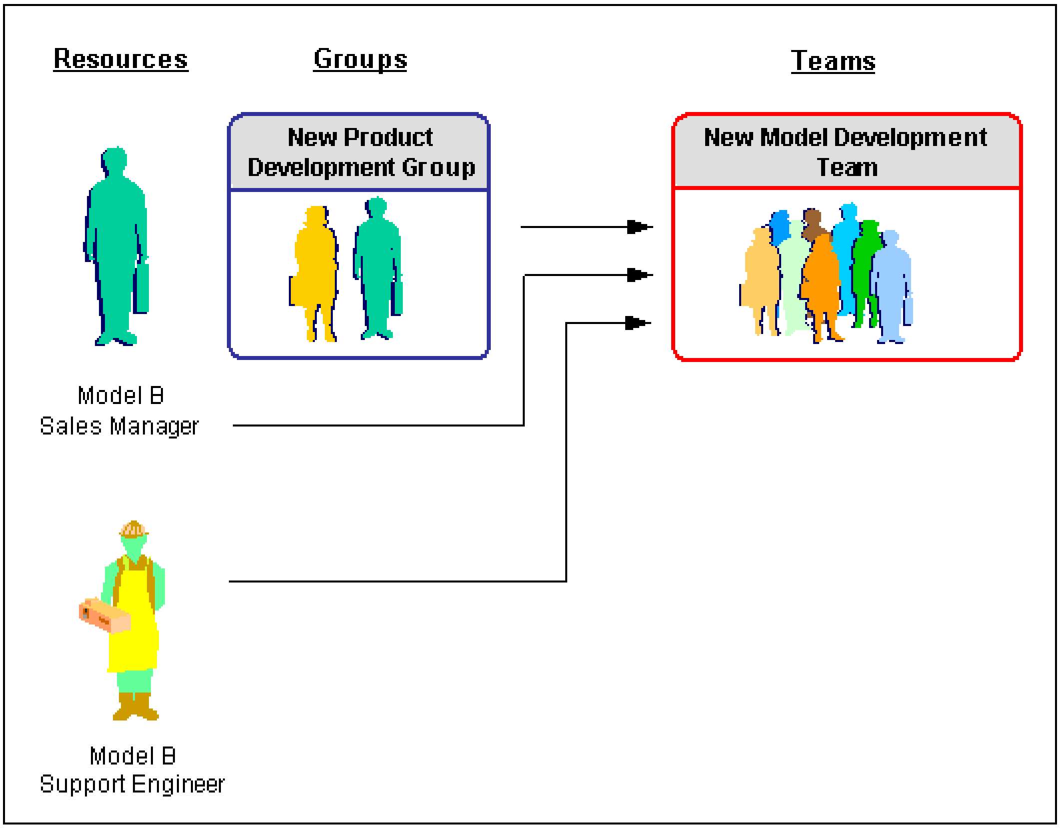
3.3.3 Managing Roles and Groups

You can manage roles and groups by viewing role details, assigning roles to resources, or assigning resources to groups.

3.3.4 Defining Teams

A team is a collection of groups and resources that is organized to accomplish a specific task or objective. Team members are chosen on the basis of their availability, qualifications, and location. For example, a manufacturing company wants to develop a new model that has the same features of a model called Model B. To accomplish this, the company sets up a new model development team can be established to have a new product development group, a sales manager for model B, and a support engineer who specializes in model B.

Figure 3–7 Teams Example



3.3.4.1 Team Member Roles

Each team member, whether it is an individual resource or a resource group, has a member role assigned to it. For example, the new model development group (a group resource) and the support engineer (an individual resource) can both have a development member team role. The Development Member role must be one of the group roles that have been assigned to the New Model Development Group. Like a group member, a team member can have multiple roles assigned to a team.

3.3.4.2 Team Roles

You can assign multiple roles to a team. For example, the New Model Development Team will play a Development Member role, and a Support Manager role at the same time.

3.3.4.3 Team Usage

Specify the usage of your team. For example, the New Model Development Team can be used in Support, Telesales, and Service.

3.3.4.4 Team Member Notifications

You can configure teams to receive notifications to ensure that important communications reach all team members.

3.3.5 Running Reports

Resource Manager enables you to run Group Audit and Group Structure reports.

3.3.5.1 Group Audit Report

Resource Manager supports the ability to run an audit report detailing changes to resources and resource groups created within a date range. 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.

For example, a sales manager can use the Group Audit Report to verify and trace a specific sales group for its group members' (sales representatives) change history information based on a specific time range. From the report, you can easily identify that Lisa Jones with her resource number has been changed from Key Accounts Central Group (group number 54) to Key Accounts Group (group number 43). This information can be an audit record for sales credits or compensation distribution.

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.

3.3.5.2 Group Structure Report

Resource Manager supports the ability to run a Group Structure Report. It displays only the group hierarchy and structure information.

For example, you can use the Group Structure Report to view the group hierarchy information for a specific group, such as Key Accounts Group. The group member's name and its resource category information (such as employee resource), child group name (Key Accounts Central), and numbers of level down from the selected group (such as the Key Accounts Central child group is one level down from the selected Key Accounts Group) and effective date information are all visible in the report.

4

Phase I: Setting Up Resource Manager

Implementing Resource Manager takes place in two phases. In the first phase, you set up Resource Manager by defining and configuring required components. In the second phase, you use Resource Manager to manage your resources. This chapter provides detailed instructions for Phase I: Setting up Resource Manager. Topics include:

- Overview of Setting up Resource Manager
- Mass Importing Resources From Other E-Business Applications
- Importing Resources From Legacy Applications
- Importing Individual Resources
- Creating an Employee Resource in HTML
- Creating a Salesperson in Forms
- Creating Salespersons in Multiple Organizations
- Defining Role Types
- Defining Roles in Forms
- Defining Roles in HTML
- Specifying Role Attributes
- Setting Profile Options for HTML
- Defining Skill Levels in HTML
- Configuring Group and Team Member Notifications
- Publishing Business Events

4.1 Overview of Setting Up Resource Manager

This section contains a summary of the steps for setting up Resource Manager. Detailed instructions for these steps are provided in the subsequent sections.

4.1.1 Defining Resources

You define resource by either importing them into Resource Manager and then modifying them or by creating them in Resource Manager.

4.1.1.1 Importing Resources

Instructions for importing resources are contained in the following sections:

- Mass Importing Resources From Other E-Business Applications
- Importing Resources From Legacy Applications
- Importing Individual Resources

4.1.1.2 Creating Resources in HTML and Forms

You can create resource directly in Resource Manager, however, you are limited to creating specific types of Resources in either the HTML or Forms-based versions of the product.

HTML. For example, you can create a salesperson in the HTML version of Resource Manager whose data is written directly to the HRMS tables. You cannot create a salesperson of type Other and TBH in HTML, although you can query them by choosing Preferred Resource in the Resource Advanced Search window. Detailed instructions for this step are provided in the Creating an Employee Resource in HTML section.

Forms. You can create a salesperson in the Forms-based version of Resource Manager and designate it as type Other or TBH (To Be Hired). Resources of this type are written directly to the Resource Manager tables and do not appear in the HRMS tables. You can also create a resource such as a salesperson in Forms by first creating the resource in HRMS and then importing the resource into resource manager and modifying it as required. If you have not licensed HRMS, you can create a resource using the Form windows that are shared with HRMS and then using Resource Manager to import the resource. Detailed instructions for these steps are provided in the following sections:

- Creating a Salesperson in Forms
- Creating Salespersons in Multiple Organizations

4.1.2 Optionally Defining Role Types and Roles

After defining resource, you can organize them with roletypes and roles. A role type is a broad descriptive category such as "Sales" that contains one or more roles. A role is a more detailed descriptive categories such as "Sales Representative" or "Sales Manager". When a role is created, it is associated with a specific role attribute. This enables different roles to be grouped together when defining a resource reporting hierarchy. Detailed instructions for creating role types and roles and for assigning attributes to roles are provided in the following sections:

- Defining Role Types
- Defining Roles in Forms
- Defining Roles in HTML
- Specifying Role Attributes

4.1.3 Setting Profile Options for HTML

After defining resource and optionally creating defining roletypes and roles for those resources, the following profile options must be set to for the HTML version of Resource Manager:

- Employee Resource Update Access
- Group Update Access
- Resource Lookup Audience
- Role Update Access
- Resource active days after termination of relationship

Detailed configuration information for these profile options is provided in the Setting Profile Options for HTML section.

4.1.4 Defining Skill Levels in HTML

The final step in setting up Resource Manager is to define skill levels in the HTML version of Resource Manager. In the HTML version of Resource Manager, the appropriate users or system administrators with the Resource Self Service Administrator responsibility must set up the Define Skill Levels window. Instructions for performing this step are contained in the Defining Skill Levels in HTML section.

4.1.5 Configuring Group and Team Member Notifications

Resource Manager enables group and team members to receive Workflow notifications. This is particularly useful when important communications are sent to a group or team that require immediate dissemination to all of their members. For example, if a support group or team receives a high priority service request then all members of the group or team can simultaneously be notified to ensure that immediate action is taken. Resource Manager accomplishes this by integrating resources, groups, group members, teams, and team members with Workflow roles. When a resource is created or updated, its information, including relevant attributes, is stored in both Resource Manager and the corresponding Workflow role tables. Notifications can only be sent to all group or team members if the group-to-membership or team-to-membership relationship information stored in Resource Manger is in sync with the data stored in the corresponding Workflow role tables. To accomplish this, Resource Manager administrators must run the Synchronize Workflow Roles concurrent program on a periodic basis. Instructions for performing this step are contained in the Configuring Group and Team Member Notifications section

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Note: In addition to enabling group and team member notification, Resource Manager integration with Workflow roles also provides a framework for task security. The Tasks chapter in the Oracle Common Application Components User Guide provides a conceptual overview of task security features. The Tasks chapter in the Oracle Common Application Components Implementation Guide provides technical information including instructions for customizing security and granting access privileges to appropriate grantees or users.

4.1.6 Publishing Business Events

Resource Manager uses event subscriptions to publish events such as creating, updating, and deleting resources to enable resource manager users to subscribe to these events and perform their required business processes. An event subscription is a registration indicating that a particular event is significant to a particular system and specifying which processing to perform when the triggering event occurs. Instructions for performing this step are contained in the Publishing Business Events section.

4.2 Mass Importing Resources From Other E-Business Applications

Mass importing resources is the most common method of defining resources that are stored in e-Business applications such as HRMS, TCA, or PO. This is accomplished using concurrent programs listed in the following table to synchronize data between Resource Manager and the HRMS, TCA, and PO databases. 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 other applications and to maintain data integrity.

Prerequisites

None

Responsibility

CRM Administrator or

System Administrator

Navigation

Navigate to the Navigator - CRM Administrator window, or

Navigate to the Navigator - System Administrator window

Steps

Run the Resource Manager concurrent programs listed in Appendix B: Concurrent Programs. Instructions for running the concurrent programs are contained in this appendix.

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.

4.3 Importing Resources From Legacy Applications

You can import resource from legacy application using the Resource Manager public published APIs. To accomplish this you must first use the APIs of your legacy system to import the legacy data into either the HRMS, TCA, or PO databases. Once this is accomplished, create a batch program that calls the Resource Manager public published APIs and uses them to transfer data from HRMS, TCA, or PO, to Resource Manager. See the Resource Manager chapter in the Oracle CRM API Reference Guide for more information about Resource Manager public published APIs.

4.4 Importing Individual Resources

In some cases, you may want to import individual resources from different application databases. You can accomplish this by selecting a resource based on its category and then identifying 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 TCA, depending on the resource category you select. The only resource 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) in Forms. Perform the following steps to import a resource.

Note:

- If Oracle HRMS is installed and you have a license for it, then you must create a resource in that application first before importing it.
- If you do not have HRMS installed and licensed, then create a resource using "shared" forms that the HRMS application uses. The navigation path to create a resource is:
  Maintain Employee > Employee.
- Whether or not you use HRMS, the data is written to the HRMS tables.
- For further details, consult the Oracle HRMS documentation.

Prerequisites

None

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Import Resources**.
2. In the Selection Criterion window, 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**.
   b. Define the resource information from the tab options.
   c. Choose **File > Save**.

Guidelines

Before importing an individual resource, you should understand the following:

- Resource Manager does **not** require transaction numbers to import a resource.
- The Comments field in the Selected Resources window indicates whether or not the resource entry is a new record, duplicate record, or has a new role definition.
- When synchronizing an employee resource imported from HR using the Synchronize Employees concurrent program, the end date will not be modified. To synchronize the end date in Resource Manager, you must modify it manually with the correct information. If you have imported a large number of employees and do not want to end date them manually, you can write a script that calls the Update_Resource API and passes the required value to the p_end_date_active parameter.

See Also

See the Synchronize Employees concurrent program in Appendix B: Concurrent Programs.

4.5 Creating an Employee Resource in HTML

When you create an employee resource which is a salesperson, the information is recorded in the HR tables. Users with the Resource Self Service Administrator responsibility can see the Create button shown in the Employees window. Therefore, they can create a new employee resource and specify the required sales information for compensation. When an employee resource is created in the HTML Resource Manager, this information is also recorded in Oracle Human Resources Management System (HRMS) and is automatically imported into the Forms-based Resource Manager. Perform the following steps to create an employee resource.

Note:

- If changes are made to the Manager field (assign or update manager information for an employee), then the Flatten Employee Hierarchy concurrent program needs to be run in order to reflect the changes in the organization chart.
- A salesperson number can be either numeric numbers or letters or a combination of both. It can also be the same number as the employee number. After saving or updating resource information, validation occurs to verify that no duplicate salesperson numbers are created.
- You can update Resource information in the HTML-based version without running the concurrent program Synchronize Employees as you would if you updated information in the HRMS application.
- If a resource (who first was a salesperson with a salesperson's number) changes jobs within the same company (and is no longer a salesperson), you must end date the first resource and create a new resource with new settings. You cannot delete a salesperson's number once it is assigned.

Prerequisites

The JTFRS: Employee Update Access profile must be set to "Any" for the system Administrator to be able to update other employee's information.

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the HTML Resource manager and login as the administrator.

Steps

1. In the Employees window, click **Create**.

   The Create An Employee Resource window opens.

2. Enter the employee's last, first, and middle name in the specified fields.

3. Use the drop-down list to select the employee's title, for example, Ms.
4. Enter a username for the new employee.
5. 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 populated.
6. 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.
7. Enter search criteria for your manager's name (at least three character's) and click **Go**.
8. Click your Manager's name to populate the field.
9. Click **Create**.

   The employee resource is created. The password is emailed to the user.

Note: In the HTML version, Salesperson Number and Sales Credit Type fields are required when you create an employee resource in the Create An Employee Resource window. This is because the HTML Resource Manager is primarily used by Oracle Sales Online and employee resources created here are salespeople.

4.6 Creating a Salesperson in Forms

You can designate a resource as a salesperson in the Receivables tab of the Forms-based interface. 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.
- Users are not allowed to create a new user that is associated to a resource/employee. It is only the first time during the "Create Employee" process that user can specify a non-existing user name.
- If you make any changes to a resource in HRMS, then you must run the appropriate concurrent programs to synchronize resource information. See the chapter on Concurrent Programs in the Implementation Guide appendix.
- If a resource (who first was a salesperson with a salesperson's number) changes jobs within the same company (and is no longer a salesperson), you must end date the first resource and create a new resource with new settings. You cannot delete a salesperson's number once it is assigned.

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

Table 4–1 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.

Perform the following steps to create a salesperson.

Prerequisites

None

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Resources**.

   The Find Resources window opens.

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

   The Resource window opens.

3. Select either TBH or Other for the Category.
4. You **must** enter a valid value for the Salesperson Number for the Salesperson to be created. Although it can accept a 0 value, it is not recommended.
5. Enter the new salespersons name in the Name field.
6. 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.

7. Select the Receivables tab.

   For an explanation of each tab, see the Guidelines following this procedure.

   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.

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

9. 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.

Table 4–2 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.
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.
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.

Table 4–2 Resource Tab Descriptions

Tab	Description
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 and assign a territory.
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.

Table 4–3 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.
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. Territory consists of geographic criteria a salesperson is responsible for.

4.7 Creating Salespersons in Multiple Organizations

A business unit such as a corporation can have multiple separate organizations within its structure that are also known as MULTI-ORGS. A salesperson can cover areas in multiple organizations. In order to receive the appropriate compensation from each organization, the salesperson must belong to both organizations. The salesperson has one employee number, but multiple salesperson numbers that correspond to each organization that the salesperson belongs to.

To add a salesperson to another organization requires two steps:

1. First set the multiple organization profile option MO: Operating Unit to the appropriate organization using the drop down menu provided in the Responsibility field. Use the System Administrator responsibility and select Profile > System. In the Find System Profile Values window, select the appropriate Responsibility and enter the MO: Operating Unit profile option. Save your work and log in using your user ID.
2. Query the resource in Resource Manager and assign a salesperson's number as well as the other required actions outlined in the following steps.

Example

Business World Enterprises is a global company consisting of several organizations including Business World, USA, and Business World, Canada. You are a salesperson for Business World, USA. Your coverage encompasses parts of Western Canada and Mexico. In order to receive financial compensation in both US and Canadian dollars, as well as Mexican pesos, you must be a salesperson for Business World, USA, Business World, Canada, and Business World, Mexico. Your employee number is #0001 and your salesperson number in Business World USA is #0001US. Your employee number for Business World, Canada is #0001CAN and for Business World, Mexico #0001MEX.

Any changes pertaining to your Canadian and Mexican compensation packages can be handled by the Resource Administrators in Business World, Canada and Business World, Mexico. In other words, regional changes that affect you are handled by that organization. Changes that affect you on a global level, such as if you receive a promotion and becomes a Senior Salesperson, would be handled by the parent company, Business World Enterprises.

The following table lists the sample data.

Table 4–4 Example Data

Country	MO:Operating Unit	Salesperson ID Number
United States	Vision Corporation	0001US
Canada	Vision Canada	0001CAN
Mexico	Vision Mexico	0001MEX

Perform the following steps in Forms to make an existing salesperson visible from one organization to another organization.

Prerequisites

- The salesperson must exist in one organization in Resource Manager.
- The profile value for the administrator (for example, the profile value at the user level) for 'MO: Operating Unit' must correspond to the targeted organization before you set the salesperson in that organization. Set the profile option before using Resource Manager.

Responsibility

- CRM Administrator or
- CRM Resource Administrator

Navigation

Navigate to the Define Resource window.

Steps

1. Query the imported resource for the selected employee.
2. Click **Resource Details.**

   The Resource window opens and is populated with your selection.
3. Specify a salesperson number for the resource. Since you have changed your profile option, it is empty.
4. In the Receivables tab, verify that the default Date Active is the correct one.
5. Enter the information for Sales Credit type.
6. Save your work.

The employee is a salesperson in both organizations.

7. (Optional) Repeat the entire procedure including first resetting the profile option to assign the salesperson to an additional organization.

Guidelines

You can also create a salesperson in multiple organizations using the HTML-based Resource Manager, but you first must set your profile option in Forms.

4.8 Defining Role Types

> **Note:** You must save the Resource first before defining a Role Type.

A role type is a broad descriptive category such as "Sales" that contains one or more roles. A role is a more detailed descriptive categories such as "Sales Representative" or "Sales Manager". Resource Manager is delivered with pre-defined Role Types for all CRM modules. Perform the following steps to define additional custom Role Types for your company. Make sure that a role type exists with which you can associate the new role.

Prerequisites

None

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Setup > Role Types**.

   The Application Object Library: JTF_RS_ROLE_TYPES Lookups window displays existing Role Types.

2. Use the down arrow to scroll to the bottom of the list of Role Types.
3. Select the last entry in the record and choose **File > New** to add a blank field.
4. Enter the name of the new Role Type in the blank field at the bottom of the list.
5. In the Meaning field, enter the CRM module for which this Role Type is created.
6. Choose **File > Save** to complete the Role Type definition.

4.9 Defining Roles in Forms

A Role may encompass one or more job descriptions and job titles. Use Roles to assign responsibilities to resources, resource groups and resource teams. Resource Manager is delivered with pre-defined Roles for all CRM modules. Perform the following steps in Forms to define additional custom Roles for your enterprise.

Prerequisites

Make sure that a Role Type exists with which you can associate the new Role.

Note: When a sales role is associated with a resource that is attached to a group with no group member role, the OIC application may provide the sales representative with incorrect compensation and may incorrectly roll up the hierarchy.

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Setup > Roles.**
2. Enter your values in the Code and Name fields. Choose a Role Type from the list of values (LOV).

3. Select the Active box to make the Role active. Select one or more of the role attribute check boxes–**Member, Lead, Admin, Manager**–to associate the Role to a responsibility. See the Resource Roles Attributes table in the Guidelines section for descriptions of these role attributes.
4. Use one or more Job names in the job region to describe jobs associated with the Role.
5. Select **File > Save** to complete the Role definition.

   The new role name registers in the Role Name field in Resource Manager. The following table describes resource role attributes.

Guidelines

The following table describes resource role attributes used in the Resource Manager.

Table 4–5 Resource Role Attributes

Check Box	Action
Member	Identifies the role name as a member of the role.
Lead	Identifies the role name as a lead for the role.
Active	Identifies the role as active.
Admin	Identifies the role as administrative.
Manager	Identifies the role as managerial.
Seeded (Read-only)	Identifies the role as seeded.

4.10 Defining Roles in HTML

> **Note:** You must save the Resource first before defining a Role Type.

A Role Type is a category of roles associated with a particular CRM module. Resource Manager is delivered with pre-defined Role Types for all CRM modules. Perform the following steps in HTML to define additional custom Roles for your enterprise. Ensure that a role type exists with which you can associate the new role.

Prerequisites

None

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the People tab in HTML.

Steps

1. Select the Roles subtab.
2. Click **Create**.

   The Create Role window opens.
3. Enter text in the Role Name, Role Code, and Description fields.
4. Select the Role Type from the drop-down list.
5. Select the attributes.
6. Click **Create**.

4.11 Specifying Role Attributes

Attributes aid in grouping different roles together when defining a resource reporting hierarchy. This hierarchy is used in sales product families, such as Sales Online and Telesales, to control the data access privilege (customer, sales lead, and sales opportunity) as well as sales forecast rollup and incentive compensation plan. It is also used for workflow notifications and escalations. You can have more than one attribute such as Admin and Manager as each has different functions. However, you would not select Lead and Manager, for example, because Lead is a subset of Manager.

Example

You set up an escalation for service requests and tasks, notifications for members of groups go to the manager. Therefore, besides defining a role, you also need to specify the role attribute information for this new role by selecting the following seeded role attribute check boxes:

- **Member**: Default when another attribute is not chosen (Lead, Administrator, Manager).
- **Lead**: Used in the context of team lead.

- **Admin**: Used to view and modify information about other group members. In the HTML Resource Manager, only a user in a group with either the Administrator or Manager group member role can update group member and group hierarchy information.
- **Manager**: Used to set up the group reporting hierarchy. For example, all the forecasts for a group of sales representatives roll up to the person with the Manager role attribute in that group. In addition, a user with the Manager group member role can update the group member and group hierarchy information in the HTML Resource Manager.

Perform the following steps to view roles and role attributes.

Prerequisites

A role must exist before it can be viewed.

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Setup > Roles**.
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.

4.12 Setting Profile Options for HTML

The following profile options must be set to specify functional behavior for the HTML version of Resource Manager. Each profile option is specific for HTML-based functionality.

Table 4–6 Resource Manager Profile Options

Name	Default Value	Level	Description	Outcome
Employee Resource Update Access	Self	Site	This profile option sets the security around updating employee information in the Resource Manager.	If set to **Self**, only the employee can update their own information. If set to **Any**, others, including a System Administrator, can update the employee information, including overriding any previous values in the profile option: Resource Lookup Audience.
Group Update Access	None	Site	This profile option sets the security around updating groups, including hierarchies.	If set to **None**, then only the Administrator or manager can update their group and any other group following their group in the hierarchy. If set to **All**, then the user can update any group hierarchy in the site.
Resource Lookup Audience	General	Site	This profile option controls what the user views in the Resource Details window and in the Advanced Search.	If set to **Admin**, then the user can query in the Advanced Search using the additional fields of Resource number and Salesperson number. If set to **General**, then the user is sees and searches on limited fields.
Role Update Access	None	Site	This profile is used to control the access to the Role HTML windows. The Resource Self Service Administrator responsibility level is set to the **All** value.	If set to **None**, then it is Read-Only access to the Role windows. You can search and view all the roles. If set to **All**, then the user can create, update non-seeded roles, delete non-seeded roles, search, and view roles.

Table 4–6 Resource Manager Profile Options

Name	Default Value	Level	Description	Outcome
Resource active days after termination of relationship	30 days	Site	This profile is used when end dating a resource of type Partner. It allows a set period of days for the resource to stay active after termination. Set at Site level.	When set to **x days** the resource has that many days to stay active in the system.

Note: See Appendix A: Profile Options for instruction on setting the above listed profile options.

4.13 Defining Skill Levels in HTML

Defining skill levels in HTML is accomplished by assigning a numeric value to a skill rating and changing the value of the skill rating if required. Instruction for performing these steps are contained in the following sections:

- Assigning a Numeric Value to a Skill Rating
- Changing Skill Rating Values

4.14 Assigning a Numeric Value to a Skill Rating

Use the Define Skill Levels window in HTML to enter the name of the skill level and its associated numeric value. Once this is specified, an individual resource can select an appropriate skill level from the list of values of the Level field in the Rate Skill window to rate his technical skills. These skill levels are standard regardless of whether or not the resource is rated at product, platform, or problem code level. The numeric values for the related skill levels can be a part of the calculation when selecting the optimal individual for a service request.

Use the following rules to define skill level information:

- No two skill ratings can have the same numeric value or the same name.
- Only positive integers are acceptable in the Numeric Value field.
- There is no change to the numeric value of “Not Applicable” (N/A).
- The sorting order depends on the numbers assigned to the values.

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

Prerequisites

None

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the HTML Resource Manager and login as the administrator.

Steps

1. 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.

Note: You can define skills using the following combinations:

- Product
- Product and component
- Product and problem code
- Problem code
- Problem code and category
- Platform
- Platform and Category

4.15 Changing the Name of a Skill Rating

The skill levels are editable, but you cannot delete any of them without entering a new name or value. Otherwise, an error message occurs saying "Level Name cannot be null" or "Numeric Value cannot be null." Perform the following steps to change the name of a skill rating.

Prerequisites

None

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the HTML Resource manager and login as the administrator.

Steps

1. 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.

4.16 Configuring Group and Team Member Notifications

Resource Manager enables Workflow notifications to be sent to group and team members integrating groups, teams, and their members with workflow roles. The Synchronize Workflow Roles concurrent program must be run on a periodic basis to ensure that the group-to-membership and team-to-membership relationship information stored in Resource Manger is in sync with the data stored in the corresponding Workflow role tables.

4.16.1 Group Example

The integration of resources, groups, and group members with Workflow roles can be demonstrated by creating a sample group with four members. When the sample group and its members are created in Resource Manager, the Resource Manager

APIs call wrapper APIs that subsequently populates the corresponding Workflow tables with the required information.

Step 1: Creating a Group

Begin by creating a sample group called My Group. Information for this group is stored in the JTF_RS_GROUPS_VL table in Resource Manager. Assume that creating this group generates a group ID number 10011.

Table 4–7 Group Information

Group ID	Group Name
10011	My Group

When you create a group with the preceding information, the wrapper APIs create new records in the Workflow WF_LOCAL_ROLES and WF_LOCAL_USER_ROLES tables. These records contain the original group information and additional data required by Workflow.

Table 4–8 Group Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System
JRES_GRP:10011	JRES_GRP	10011

Table 4–9 Group Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_GRP:10011	JRES_GRP	10011	JRES_GRP:10011	JRES_GRP	10011

Step 2: Defining Resources to Add to the Group

Next, you must define the four resources that you will subsequently add to the group as group members. Information for these resources will be stored differently in the Workflow tables depending on their category and whether or not their user id is null.

Table 4–10 Resources To Be Added to My Group

Resource ID	Resource Name	Category	User ID
10001	johnson	employee	101
10002	jones	employee	null
10003	lewis	other	null
10004	smith	party	null

Resource Johnson. To define the resource "Johnson" as an employee first create a new record in HRMS using the Define Employee screen. Then create an FND_USER employee using the Define User screen whose user ID is 101 and user name is "johnson". Import this employee in to Resource Manager using the Import Resource form. Resource Manager will not create a corresponding record for this employee in the Workflow tables since the WF_USERS table will already contain a record corresponding to the one in FND_USER. The FND_USER information will be stored in the following Workflow tables:

Table 4–11 Resource Johnson Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System ID
johnson	FND_USER	101

Table 4–12 Resource Johnson Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
johnson	FND_USER	101	johnson	FND_USER	101

Resource Jones. To define the resource "Jones" as an employee, first create a new record in HRMS using the Define Employee screen, then import it into Resource Manager using Import Resource form. Information for the resource "jones" will be stored in the Workflow tables as follows since the user ID is null.

Table 4–13 Resource Jones Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System ID
JRES_IND:10002	JRES_IND	10002

Table 4–14 Resource Jones Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_IND:10002	JRES_IND	10002	JRES_IND:10002	JRES_IND	10002

Resource Lewis. To define a resource "Lewis" as a resource of type Other, create a new resource in Resource Manager using the Define Resource form. Information for the resource "lewis" will be stored in the Workflow tables as follows since the resource is of type other.

Table 4–15 Resource Lewis Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System ID
JRES_IND:10003	JRES_IND	10003

Table 4–16 Resource Lewis Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_IND:10003	JRES_IND	10003	JRES_IND:10003	JRES_IND	10003

Resource Smith. To define a resource "Smith" as a party, first create a new record in TCA and then import in into Resource Manager using the Import Resource form. Information for the resource "smith" will be stored in the Workflow tables as follows since the user ID is null.

Table 4–17 Resource Smith Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System ID
JRES_IND:10004	JRES_IND	10004

Table 4–18 Resource Smith Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_IND:10004	JRES_IND	10004	JRES_IND:10004	JRES_IND	10004

Step 3: Adding Resources to the Group

After creating the required resources, you must add them to My Group. To accomplish this, query up "My Group" in the Define Groups form and add all the above members in the member region. Information for the group members will be stored in the Workflow tables as follows since the user id is null for this resource:

Table 4–19 Group Member Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JOHNSON	FND_USER	101	JRES_GRP:10011	JRES_GRP	10011
JRES_IND:10002	JRES_IND	10002	JRES_GRP:10011	JRES_GRP	10011
JRES_IND:10003	JRES_IND	10003	JRES_GRP:10011	JRES_GRP	10011
JRES_IND:10004	JRES_IND	10004	JRES_GRP:10011	JRES_GRP	10011

4.16.2 Team Example

The integration of resources, teams, and team members with Workflow roles can be demonstrated by a sample team with three individual members and one group member. When the sample team and its members are created in Resource Manager, the Resource Manager APIs call wrapper APIs that subsequently populates the corresponding Workflow tables with the required information.

Step 1: Creating a Team

Begin by creating a sample team called My Team. Information for this team is stored in the JTF_RS_TEAMS_VL table in Resource Manager. Assume that creating this team generates a team ID number 10011.

Table 4–20 Team Information

Team ID	Team Name
10011	My Team

Table 4–21 Team Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System
JRES_TEAM:10011	JRES_TEAM	10011

Table 4–22 Team Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_TEAM:10011	JRES_TEAM	10011	JRES_TEAM:10011	JRES_TEAM	10011

Step 2: Defining Resources and a Group to Add to the Team

Next, you must define the three resources and one group that you will subsequently add to the team as team members. Information for the resources and group will be stored differently in the Workflow tables depending on their category and whether or not their user id is null.

Table 4–23 Resources To Be Added to My Team

Resource ID	Resource Name	Category	User ID
10001	johnson	employee	101
10002	jones	employee	null
10003	lewis	other	null

Resource Johnson. To define the resource "Johnson" as an employee first create a new record in HRMS using the Define Employee screen. Then create an FND_USER employee using the Define User screen whose user ID is 101 and user name is "johnson". Import this employee in to Resource Manager using the Import Resource form. Resource Manager will not create a corresponding record for this employee in the Workflow tables since the WF_USERS table will already contain a record corresponding to the one in FND_USER. The FND_USER information will be stored in the following Workflow tables:

Table 4–24 Resource Johnson Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System ID
johnson	FND_USER	101

Table 4–25 Resource Johnson Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
johnson	FND_USER	101	johnson	FND_USER	101

Resource Jones. To define the resource "Jones" as an employee, first create a new record in HRMS using the Define Employee screen, then import it into Resource Manager using Import Resource form. Information for the resource "jones" will be stored in the Workflow tables as follows since the user ID is null.

Table 4–26 Resource Jones Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System ID
JRES_IND:10002	JRES_IND	10002

Table 4–27 Resource Jones Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_IND:10002	JRES_IND	10002	JRES_IND:10002	JRES_IND	10002

Resource Lewis. To define a resource "Lewis" as a resource of type Other, create a new resource in Resource Manager using the Define Resource form. Information for the resource "lewis" will be stored in the Workflow tables as follows since the resource is of type other.

Table 4–28 Resource Lewis Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System ID
JRES_IND:10003	JRES_IND	10003

Table 4–29 Resource Lewis Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_IND:10003	JRES_IND	10003	JRES_IND:10003	JRES_IND	10003

Resource Smith. To define a resource "Smith" as a party, first create a new record in TCA and then import in into Resource Manager using the Import Resource form. Information for the resource "smith" will be stored in the Workflow tables as follows since the user ID is null.

Table 4–30 Resource Smith Information Stored in WF_LOCAL_ROLES Table

Role Names	Orig System	Orig System ID
JRES_IND:10004	JRES_IND	10004

Group My Group. Next. create a sample group called "My Group". Information for this group is stored in the JTF_RS_GROUPS_VL table in Resource Manager. Assume that creating this group generates a group ID number 10012.

Table 4–31 Group to be added to My Team

Group ID	Group Name
10012	My Group

When you create a group with the preceding information, the wrapper APIs create new records in the Workflow WF_LOCAL_ROLES and WF_LOCAL_USER_ROLES tables. These records contain the original group information and additional data required by Workflow.

Table 4–32 Group Information Stored in WF_LOCAL_ROLES table

Role Name	Orig System	Orig System
JRES_GRP:10012	JRES_GRP	10012

Table 4–33 Group Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JRES_GRP:10012	JRES_GRP	10012	JRES_GRP:10012	JRES_GRP	10012

Step 3: Adding the Group and Resources to the Team

After creating the required group and resources, you must add them to My Team. To accomplish this, query up "My Team" in the Define Teams form and add all the above members in the member region. Information for the team members will be stored in the Workflow tables as follows since the user id is null for this resource:

Table 4–34 Group Member Information Stored in the WF_LOCAL_USER_ROLES table

User Name	User Orig System	User Orig System ID	Role Name	Role Orig System	Role Orig System ID
JOHNSON	FND_USER	101	JRES_TEAM:1001	JRES_TEAM	10011
JRES_IND:10002	JRES_IND	10002	JRES_TEAM:1001	JRES_TEAM	10011
JRES_IND:10003	JRES_IND	10003	JRES_TEAM:1001	JRES_TEAM	10011
JRES_GRP:10012	JRES_GRP	10012	JRES_TEAM:1001	JRES_TEAM	10011

Prerequisites

None

Responsibility

CRM Administrator or

System Administrator

Navigation

Navigate to the Navigator - CRM Administrator window, or

Navigate to the Navigator - System Administrator window

Steps

Follow the steps in Appendix B: Concurrent Programs to run the following concurrent program. Choose the appropriate parameter depending on whether you are synchronizing groups and group members, teams and team members or both with Workflow roles.

Table 4–35 Synchronize Workflow Roles Concurrent Programs

Name	Description	Frequency	Notes
Synchronize Workflow Roles	This program synchronizes all attributes and records in the workflow wf_local_* tables with the mismatching records in Resource manager. The **Synchronize Workflow For** parameter enables you specify which of the following Resource Manager entities you wish to synchronize with Workflow roles: ▪ **Groups and Group Members** synchronizes Resource Manager groups and group members with the appropriate Workflow roles tables. ▪ **Teams and Team Members** synchronizes Resource Manager teams and team members with the appropriate Workflow roles tables. ▪ **All** synchronizes Resource Manager groups, group members, teams, and team members with the appropriate Workflow roles tables.	As needed	This program should be run as follows: ▪ The first time group or team notification functionality is implemented in Resource Manager. ▪ When groups, teams, or resources that were not active at the time of their creation have become activated. ▪ If online transactions encounter a Workflow error. ▪ When the Synchronize Employees concurrent program is run. ▪ When the Synchronize Parties and Partners concurrent program is run. ▪ When the Synchronize Supplier Contact concurrent program is run.

4.17 Publishing Business Events

Resource Manager publishes events such as creating and importing resources, updating resources, and deleting resources using the Oracle Workflow Business Event System. Applications that contain data directly affected by these events can subscribe to them and synchronize or modify their data accordingly. For example if a resource that is assigned to a Task is deleted, this action is published or "raised" as a business event. Task Manager, can consequently subscribe to this event and reassign the task to an available resource.

4.17.1 The Oracle Workflow Business Event System

The Oracle Workflow Business Event System is an application service that leverages the Oracle Advanced Queuing (AQ) infrastructure to communicate business events between systems. The Business Event System consists of the Event Manager and workflow process event activities.

The Event Manager contains a registry of business events, systems, named communication agents within those systems, and subscriptions indicating that an event is significant to a particular system. Events can be raised locally or received from an external system or the local system through AQ. When a local event occurs, the subscribing code is executed in the same transaction as the code that raised the event, unless the subscriptions are deferred.

4.17.2 Resource Manager Events

When a resource is created, imported, updated, or deleted, the Resource Manager APIs call wrapper APIs that raise the following events:

Table 4–36 Resource Manager Events

Event	Description
Resource Create	This event is raised for all newly created and imported resources.
Resource Update User	This event is raised for resources whose USER_ID data has changed.

Table 4–36 Resource Manager Events

Event	Description
Resource Update dateEffectivity	This event is raised for all resources that have a modified start date active or end date active.
Resource Update Attribute	This event is raised for all the resources that have a changes in the following attributes: ■ RESOURCE_NAME ■ TIME_ZONE ■ COST_PER_HR ■ PRIMARY_LANGUAGE ■ SECONDARY_LANGUAGE ■ IES_AGENT_LOGIN ■ SERVER_GROUP_ID ■ ASSIGNED_TO_GROUP_ID ■ COST_CENTER ■ CHARGE_TO_COST_CENTER ■ COMPENSATION_CURRENCY_CODE ■ COMMISSIONABLE_FLAG ■ HOLD_REASON_CODE ■ HOLD_PAYMENT ■ COMP_SERVICE_TEAM_ID ■ SUPPORT_SITE_ID
Resource Delete	This event is raised for deleted resources.

4.17.3 Example: Importing a Resource

In this example, the Oracle Mobile Field Sales team wants to populate its temporary table with all newly imported/created resources in Resource Manager. This process is accomplished as follows:

1. A new employee is hired to fill an open position within the organization.
2. Resource Manager conducts its weekly import of new resources from HRM.

3. The new employee is imported into Resource Manager and the following new record is created as an employee resource in the table JTF_RS_RESOURCE_EXTNS_VL:

Table 4–37 Imported Resource Johnson Record

Resource Id	Resource Name	Category	User Id
10001	Johnson	Employee	101

4. Importing the resources into Resource Manager raises the following Resource Create event in the Oracle workflow event Manager:

Table 4–38 Resource Create Event

Event Name	Event Key
oracle.apps.jtf.jres.resource.create	oracle.apps.jtf.jres.resource.create-1001

5. Oracle Mobile Field Sales subscribes to the Resource Create event, every time a user syncs from a remote location to determine whether any new records have been created in Resource Manager. Because the field sales application is used mostly offline, new resource records may not be replicated into the local database, there fore, by subscribing to the event, field sales can get up to date records when a user syncs to replicate the online database.

Table 4–39 Subscription for Resource Create Event

Event Filter	Phase	Status	Rule Function
oracle.apps.jtf.jres.resource.create	>100	Enabled	OracleMobileFieldSales.ResourceCreated

The Oracle Mobile Field Sales team owns the rule function, **OracleMobileFieldSales.ResourceCreated**, and has the logic to populate their temporary table with all newly imported or newly created resources in Resource Manager.

6. The sales manager with the open position syncs the sales manager’s laptop to replicate its data with the system's data using the temporary table. After completing the sync, the sales manager sees the new employee record and is able to assign the open opportunities to the new salesrep as well as adding the new salesrep to the manager’s sales group.

4.17.4 Example: Updating a Resource

In this example, Oracle Service only assigns the following resources to a Service Request if the resource is attached to an FND user:

Table 4–40 Resource Johnson Data

Resource Id	Resource Name	Category	User Id	Start Date	End Date	Time Zone
10001	Johnson	Employee	101	01-01-2002	None	Pacific

4.17.4.1 Updating the USER_ID Value

If the Service Request is already assigned to a resource that has a USER_ID value attached and Resource Manager changes the USER_ID value to NULL, then Oracle Service must reassign the Service Request to a different resource.

1. Resource Johnson is attached to a valid FND user and is assigned to the following Service Request:

Table 4–41 Service Request for Resource Johnson

Service Request Id	Service Request Name	Assignee Id	Assignee Name
1001	Software Problem	10001	Johnson

2. The FND user record with USER_ID value 101 is deleted in FND Applications.
3. Resource Manager performs the following steps to update the record for the resource, Johnson:
   a. Resource Manger executes the 'Synchronize Application user name' Concurrent Program to update the USER_ID attached to 'Johnson' to NULL

Table 4–42 Updated Record for User Johnson

Resource Id	Resource Name	Category	User Id
10001	Johnson	Employee	NULL

   b. Resource Manager simultaneously raises the Business event, o**racle.apps.jtf.jres.resource.update.user** with the following parameters:

Table 4–43 Resource Update Event

Parameter Name	Parameter Value
RESOURCE_ID	10001
CATEGORY	EMPLOYEE
OLD_USER_ID	101
NEW_USER_ID	NULL

4. The service request subscribes to the resource update event with the following details:

Table 4–44 Subscription for Resource Update Event

Event Filter	Phase	Status	Rule Function
oracle.apps.jtf.jres.resource.update.user	>100	Enabled	OracleService.ResourceUserUpdated

Oracle Service owns the rule function **OracleService.ResourceUserUpdated** that contains the logic to reassign the resource to a resource that has a valid USER_ID attached.

4.17.4.2 When START_DATE_ACTIVE and/or End_DATE_ACTIVE is Changed

In this example, Oracle Service only assigns the resources to a Service Request if the resource is valid in Resource Manager because the service request assignment period exists within the Resource start date and end date. If the Service Request is already assigned to a resource and Resource Manager changes the date effectivity of that resource, Oracle Service must reassign the Service Request to some other resource.

1. Resource Johnson is assigned to the following Service Request from 08-01-2002 to 08-01-2003:

Table 4–45 Service Request for Resource Johnson

Service Request Id	Service Request Name	Assignee Id	Start Date	End Date
1001	Software Problem	10001	08-01-2002	08-01-2003

2. The Resource Johnson is updated and a business event is raised.
   a. Resource, Johnson is end dated in Resource Manager with the end date, '08-01-2002:

Table 4–46 Modified Record for Resource Johnson

Resource Id	Resource Name	Category	Start Date	End Date
10001	Johnson	Employee	01-01-2002	08-01-2002

b. Resource Manager raises the event, **oracle.apps.jtf.jres.resource.update.effectivedate** with the following parameters:

Table 4–47 Resource Update Event

Parameter Name	Parameter Value
RESOURCE_ID	10001
CATEGORY	EMPLOYEE
RESOURCE_NAME	Johnson
OLD_START_DATE_ACTIVE	01-01-2002
OLD_END_DATE_ACTIVE	NULL
NEW_START_DATE_ACTIVE	01-01-2002
NEW_END_DATE_ACTIVE	08-01-2002

3. Service request subscribes to the resource update event with the following details.

Table 4–48 Subscription for Resource Update Event

Event Filter	Phase	Status	Rule Function
oracle.apps.jtf.jres.resource.update.effectivedate	>100	Enabled	OracleService.ResourceDateUpdated

Oracle Service owns the rule function **OracleService.ResourceDateUpdated** and has the logic to reassign the resource to a resource with a valid date effectivity.

4.17.4.3 When Resource Time Zone is Changed

In this example, Oracle Service assigns the resources to a service request that depends on the time zone of the resource. If the Service Request is already assigned to a resource and Resource Manager changes the time zone of that resource, Oracle Service must reassign the Service Request to some other resource.

1. Resource Johnson is assigned to the following Service Request that has a time zone 'Pacific':

Table 4–49 Service Request Assignment

Service Request Id	Service Request Name	Assignee Id	Time Zone
1001	Software Problem	10001	Pacific

2. The resource is modified as follows:
   a. Time zone for the resource, Johnson is changes from 'Pacific' to 'Central':

Table 4–50 Modified Service Request Assignment

Service Request Id	Service Request Name	Assignee Id	Time Zone
1001	Software Problem	10001	Central

   b. Resource Manager simultaneously raises the Business event, **oracle.apps.jtf.jres.resource.update.attributes** with the following parameters:

Table 4–51 Resource Update Event

Parameter Name	Parameter Value
RESOURCE_ID	10001
CATEGORY	EMPLOYEE
RESOURCE_NAME	Johnson
OLD_ TIME_ZONE	Pacific
NEW_ TIME_ZONE	Central

3. Service request subscribes to the resource update event with the following details:

Table 4–52 Subscription to Resource Update Event

Event Filter	Phase	Status	Rule Function
oracle.apps.jtf.jres.resource.update.attributes	>100	Enabled	OracleService.ResourceTimeoneUpdated

Oracle Service owns the rule function, **OracleService.ResourceTimeoneUpdated** that contains the logic to reassign the resource to a resource that has a required time zone.

4.17.5 Example: Deleting a Resource

In this example, only Resource of type 'TBH' such as the following resource can be deleted using the delete resource API:

Table 4–53 Resource Abraham Example

Resource Id	Resource Name	Category	User Id	Start Date	End Date
10002	Abraham	Other	NULL	01-01-2002	NULL

Task Manager assigns the resources to a Task only if that resource exists in Resource manager. If the Task is already assigned to a resource and Resource Manager deletes that resource, Task Manager needs to reassign that Task to some other existing resource.

1. Resource Abraham is assigned to the following Task from 08-01-2002 to 08-01-2003:

Table 4–54 Task Assignment

Task Id	Task Name	Resource Id	Resource Name	Start Date	End Date
1002	Product Presentation	10002	Abraham	08-01-2002	08-01-2003

2. Resource, Abraham is deleted using the API Resource Public API jtf_rs_resource_pub.delete_resource.
3. Because resource, Abraham is deleted, Task Manager must reassign the task to a different resource. To accomplish this, Resource Manager raises the Business event, **oracle.apps.jtf.jres.resource.delete** with the following parameters:

Table 4–55 Resource Delete Event

Parameter Name	Parameter Value
RESOURCE_ID	10001

4. Task Manager subscribes to the resource update event with the following details:

Table 4–56 Resource Delete Event Subscription

Event Filter	Phase	Status	Rule Function
oracle.apps.jtf.jres.resource.delete	>100	Enabled	TaskManager.ResourceDeleted

Task Manager owns the rule function, **TaskManager.ResourceDeleted** is the Rule function that contains the logic to reassign the resource to an existing resource.

4.17.6 Steps

This section provides instructions for publishing Resource Manager business events.

4.17.6.1 Create Resource

Perform the following to raise a business event using the jtf_rs_wf_event_pub.create_resource wrapper API:

1. Add the following parameters into the parameter list using, wf_event.AddParameterToList
   - RESOURCE_ID
   - RESOURCE_NAME
   - CATEGORY
   - USER_ID
   - START_DATE_ACTIVE
   - END_DATE_ACTIVE
2. Event_key will be 'oracle.apps.jtf.jres.resource.create-'||jtf_rs_wf_event_guid_s.nextval.
3. Raise the Event, oracle.apps.jtf.jres.resource.create using the workflow API, Wf_event.Raise.

4.17.6.2 Update Resource

Perform the following to raise a business event using the jtf_rs_wf_event_pub.update_resource API:

When the user_id is updated

1. Add the following parameters into the parameter list using, wf_event.AddParameterToList.

- RESOURCE_ID
- CATEGORY
- RESOURCE_NAME
- OLD_USER_ID
- NEW_USER_ID

2. Event_key will be 'oracle.apps.jtf.jres.resource.update.user-'||jtf_rs_wf_event_guid_s.nextval.
3. Raise the Event, oracle.apps.jtf.jres.resource.update.user using the workflow API, Wf_event.Raise.

When Start Date Active or End Date Active is changed

1. Add the following parameters into the parameter list using, wf_event.AddParameterToList

- RESOURCE_ID
- CATEGORY
- RESOURCE_NAME
- OLD_START_DATE_ACTIVE
- OLD_END_DATE_ACTIVE
- NEW_START_DATE_ACTIVE
- NEW_END_DATE_ACTIVE

2. Event_key will be 'oracle.apps.jtf.jres.resource.update.effectivedate-'|| jtf_rs_wf_event_guid_s.nextval.
3. Raise the Event, oracle.apps.jtf.jres.resource.update.effectivedate using the workflow API, Wf_event.Raise.

When any of the following attributes changed

RESOURCE_NAME

- TIME_ZONE
- COST_PER_HR
- PRIMARY_LANGUAGE
- SECONDARY_LANGUAGE
- IES_AGENT_LOGIN
- SERVER_GROUP_ID
- ASSIGNED_TO_GROUP_ID
- COST_CENTER
- CHARGE_TO_COST_CENTER
- COMPENSATION_CURRENCY_CODE
- COMMISSIONABLE_FLAG
- HOLD_REASON_CODE
- HOLD_PAYMENT
- COMP_SERVICE_TEAM_ID
- SUPPORT_SITE_ID

1. Add the following parameters into the parameter list using, wf_event.AddParameterToList

- RESOURCE_ID
- CATEGORY
- OLD_RESOURCE_NAME
- OLD_TIME_ZONE
- OLD_COST_PER_HR
- OLD_PRIMARY_LANGUAGE
- OLD_SECONDARY_LANGUAGE
- OLD_IES_AGENT_LOGIN
- OLD_SERVER_GROUP_ID
- OLD_ASSIGNED_TO_GROUP_ID
- OLD_COST_CENTER

- OLD_CHARGE_TO_COST_CENTER
- OLD_COMPENSATION_CURRENCY_CODE
- OLD_COMMISSIONABLE_FLAG
- OLD_HOLD_REASON_CODE
- OLD_HOLD_PAYMENT
- OLD_COMP_SERVICE_TEAM_ID
- OLD_SUPPORT_SITE_ID
- NEW_RESOURCE_NAME
- NEW_TIME_ZONE
- NEW _COST_PER_HR
- NEW _PRIMARY_LANGUAGE
- NEW _SECONDARY_LANGUAGE
- NEW _IES_AGENT_LOGIN
- NEW _SERVER_GROUP_ID
- NEW _ASSIGNED_TO_GROUP_ID
- NEW _COST_CENTER
- NEW _CHARGE_TO_COST_CENTER
- NEW_COMPENSATION_CURRENCY_CODE
- NEW _COMMISSIONABLE_FLAG
- NEW _HOLD_REASON_CODE
- NEW _HOLD_PAYMENT
- NEW _COMP_SERVICE_TEAM_ID
- NEW _SUPPORT_SITE_ID

2. Event_key will be 'oracle.apps.jtf.jres.resource.update.attributes-'|| jtf_rs_wf_event_guid_s.nextval.
3. Raise the Event oracle.apps.jtf.jres.resource.update.attributes using the workflow API, Wf_event.Raise.

4.17.6.3 Delete Resource

Perform the following to raise a business event using the jtf_rs_wf_event_pub.delete_resource API.

1. Add the RESOURCE_ID parameter into the parameter list using, wf_event.AddParameterToList
2. Event_key will be 'oracle.apps.jtf.jres.resource.delete-' || jtf_rs_wf_event_guid_s.nextval.
3. Raise the Event, oracle.apps.jtf.jres.resource.delete using the workflow API, Wf_event.Raise.
4. Only Resource of 'TBH' can be deleted using the delete resource API.

5

Phase II: Managing Resources

Implementing Resource Manager takes place in two phases. In the first phase, you set up Resource Manager by defining and configuring required components. In the second phase, you use Resource Manager to manage your resources. This chapter provides detailed instructions for Phase II: Managing Resources. Topics include:

- Viewing a Group Structure Report
- Running Resource Skills Report
- Viewing Resource Skills Report

5.1 Overview of Managing Resources

This section contains a summary of the steps for managing resources with Resource Manager. Detailed instructions for these steps are provided in the subsequent sections.

5.1.1 Finding and Viewing Resources

After importing a resource into Resource Manager, you can find and view the resource and manage it by performing any of the actions described in the remainder of this chapter. Instructions for finding and viewing resources are contained in the following sections:

- Finding a Resource in Forms
- Finding a Resource in HTML

5.1.2 Modifying Resources

You can modify resources by configuring resource fields for updates in HTML, assigning additional attributes to resources in Forms, or synchronizing end dates for partner relationship resources in Forms.

5.1.2.1 Configuring Resource Fields for Updates

If you are using the HTML version of Resource Manager, then the appropriate users or system administrators with the Resource Self Service Administrator responsibility must set up the Define Resource Fields for Update window. This is used to determine which fields for the resource's personal information can be updated and how the update should occur. Instructions for performing this step are contained in the Configuring Resource Fields for Updates section.

5.1.2.2 Assigning Additional Resource Attributes

In the Forms-based version of Resource Manager, you can add additional attribute information if the resource is used by one of the following e-Business applications:

- Service

- Interaction Center
- Compensation
- Receivables

Instructions for performing this step are contained in the Assigning Additional Resource Attributes section.

5.1.2.3 Synchronizing End Dates for Partner Relationship Resources

Resource Manager enables you to synchronize the end date of an imported partner relationship resource with the end date of the partner relationship resource from which it was imported. For instance, if you import a partnership resource from an application such as OSO and the end date for that partnership resource is subsequently changed in OSO, you must reflect this change in the imported resource. Instructions for pilfering this step are contained in the Synchronizing End Dates for Partner Relationship Resources section.

5.1.3 Defining Groups

You can organize and manage your resources by defining groups to which they can be assigned. You can create groups in the Forms-based or HTML versions of Resource Manager, define dynamic groups, and view group hierarchy.

5.1.3.1 Creating Groups in Forms

The Forms-based version of Resource Manager enables you to create groups, to assign them roles, and to use the exclusive flag feature. You can only assign existing roles to a resource group in Forms. Instructions for this step are contained in the Creating Groups in Forms section.

5.1.3.2 Creating Groups in HTML

The HTML version of Resource Manager enables you to create groups and to assign new or existing roles to those groups. You cannot, however use the exclusive flag feature in HTML. Instructions for this step are contained in the Creating Groups in HTML section.

5.1.3.3 Defining Dynamic Groups

You can define a dynamic group based on criteria specified in a SQL statement. Instructions for this step are contained in the Defining Dynamic Groups section.

5.1.3.4 Viewing Group Hierarchy

Resource Manager enables you to view group hierarchy including managers and subordinates for a group or resource. Instructions for this step are contained n the Viewing Group Hierarchy section.

5.1.4 Managing Roles and Groups

You can manage roles and groups by viewing role details, assigning roles and group membership to resources, and setting up group member notification.

5.1.4.1 Viewing Role Details

Instructions for this step are contained in the Viewing Role Details section.

5.1.4.2 Assigning Roles to Resources

In HTML, you can attach a roles to resources. A Role is comprised of a Role Type, a Role, and a start and end date. Instructions for this step are contained in the Assigning Roles to Resources section.

5.1.4.3 Assigning Resources to Groups

In HTML, you can assign resources to a Group. Group membership is comprised of a Group, Role Type, Role, and a start and end date. Instructions for this step are contained in the Assigning Resources to Groups section.

5.1.5 Defining Teams

You can organize resource and groups by organizing them in teams. A team is a collection of groups and resources that is organized to accomplish a specific task or objective. Instructions for this step are contained in the Defining Teams section.

5.1.6 Running Reports

Resource Manager enables you to obtain a variety of information about resources, groups and skills by running the following reports:

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

- Running Resource Skills Report
- Viewing Resource Skills Report

5.2 Finding a Resource in Forms

In Forms, use the Find Resources window to perform the following actions:

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

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

Prerequisites

Create or Import a Resource

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Resources**.
2. Choose one or more parameters upon which to search.

   Typical search parameters are:

   - Number
   - Category
   - Transaction Number
   - Name
3. (Optional) Enter the required dates for the resource in the Start Date and End Date fields.
4. Click **Find**.

The Resource Search Results window opens with a list of resources that met your criteria.

5. Select your resource and click **Resource Details**.

   The Resource window opens. From here, you can select the appropriate tab to view more details for the selected resource.

5.3 Finding a Resource in HTML

In HTML, 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.

Responsibility

- CRM Application Foundation User
- Resource Self Service Administrator (for administrative purposes)

Navigation

Navigate to People tab.

Steps

1. Perform your search either using the Quick Find or the Advanced Search feature.
2. The resources will be listed in the Employees window.
3. Click on the desired resource from the Preferred Name column.
4. From the Details window, you can view or update existing resource information if it is your own or you are an administrator.

5.4 Configuring Resource Fields for Updates

Administrators can set up resource fields for to be updated as follows:

- **Full Update**: Anyone can update the field without approval or workflow notification.

- **Update With Notification**: Anyone can update the field but it requires that a workflow notification be sent to the appropriate individual.
- **Update With Approval**: Anyone can update the field but it requires an approval first.
- **No Update**: No one can ever update the field.

By using the previous four update options, administrators can define the following specific fields that can and cannot be changed, as well as how those fields can be modified (with approval or with notification only):

- **Preferred Name:** Resources can enter and maintain their full name information.
- **Resource Address**: Resources can enter and maintain their work address information.
- **Work Phone Number**: Resources can enter and maintain their work phone number.
- **E-mail Address**: Resources can enter and maintain their e-mail address information.

Perform the following steps to add or modify field updates for a resource.

Prerequisites

You must have the Resource Self Service Administrator responsibility.

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the HTML Resource Manager.

Steps

1. 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.

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.

Guidelines

Users with the Resource Self Service Administrator responsibility can determine which fields (preferred name, resource address, work phone number, and e-mail address) can be updated and how the update should occur, such as full update, update with notification, update with approval, or no update. Detailed information is covered in the 11i Implement Common Application Components course.

5.5 Assigning Additional Resource Attributes

In Forms, you can assign or view additional resource information if the resource is used by other applications. In the following tabs you can add additional information:

- **Service**: You define the time zone for resources and cost per hour. You can enter or view the Support Site information. This information populates automatically in the Assignment Manager if the resource is selected. Note that you define the currency type in the Compensation tab.
- **Interaction Center**: You can view the e-mail addresses and the agent IDs of resources associated with the eMail Center or Interaction Center modules here. This tab is used primarily by the Interaction Center and eMail Center modules. Optionally, 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 Interaction Center. Optionally, use the Email Parameters region to specify the Interaction Center Agent's e-mail account, parameter, and value if the agent uses Oracle eMail Center to work with e-mail work items. All fields are read-only. If the resource is not associated with either center, these fields are blank.
- **Compensation:** Either view or define the Currency Type corresponding to the Cost per Hour listed on the Service tab. This information is primarily used by the Sales application.
- **Receivables:** Identify a salesperson by entering additional information in the Receivables tab. The attributes defined here are used by Oracle Accounts Receivables.

You can view only personal information about the resource in the Miscellaneous tab.

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

Prerequisites

A Resource has been created or imported.

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Resources**.
2. Choose one or more parameters upon which to search.
3. Click **Find**.

   The Resource Search Results window opens with a list of resources that met your criteria.
4. Select your resource and Click **Resource Details**.

   The Resource window opens. From here, you can select the appropriate tab to add more details for the selected resource.
5. Save your work.

Guidelines

For complete instructions, refer to “Setting Up Telephony Parameters” in Implementing Oracle Telephony Manager.

5.6 Synchronizing End Dates for Partner and Employee Resources

This section provides instructions for synchronizing the end date of an imported partnership or employee resource in Resource Manager with the original partnership or employee resource in the application from which it was imported. The synchronization process also enables you to augment the end date with a unit of time specified in the appropriate profile option. This provides additional time to process the termination of the partnership or employee resource instead of doing so on the end date.

Prerequisites

A partner or employee relationship must be created in an environment such as OSO and imported by Resource Manager. The partner or employee relationship must subsequently be end dated in the application from which it was imported, either by specifying an end date or by making the partner relationship resource inactive.

Responsibility

CRM Administrator

Resource Self Service Administrator

Navigation

Log in to the Forms interface and access the navigator.

Steps

1. Navigate to **Resource Manager>Others>Profile** and select the "Resource active days after termination of relationship" profile option.
2. Specify the number of days after the end date that you want to terminate the partner or employee relationship, and save your work.
3. Navigate to **Resource Manager>Others>Requests>Run** and select the option for running a single request.
4. Locate and run the appropriate concurrent program:
   - For partnership resources run the "Synchronize Parties and Partners" concurrent program.
   - For employee resources, run the "Synchronize Employees" concurrent program.
5. Check the partner or employee relationship resource to ensure that the end date has been synchronized according.

See Also

- Importing Individual Resources

- Mass Importing Resources from other e-Business Applications
- Setting Profile Options
- Running Concurrent Programs

5.7 Creating Groups in Forms

In this Forms-based procedure, an individual or group resource can belong to more than one group. Either 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.

Note: To view a group in HTML that was created in Forms, you must specify a member role.

Prerequisites

None

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Groups**.
2. (Optional) To find an existing resource group, use this procedure.
   a. On the application tool bar, click **View > Find**.
   b. In the Find Group window, 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.

Table 5–1 Resource Group Member Buttons

Button	Action
Member Details	Opens the main Resource window and record of the member
Move Member	Opens the Move Member window, where you can assign the member to another group
Member Roles	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.

Table 5–2 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.

5.8 Creating Groups in HTML

A group is based on the similar functionality or roles of its members. It can consist of individual resources and resource groups.

Example

Vision Motor Corporation has several sales groups for different models. Linda, as a sales manager, leads the Vision Model A Sales Group. She has three sales representatives, John, Mark, and Carol, directly working for her. This Vision Model A Sales Group can also consist of another resource group, Key Accounts West Group, to handle sales in the west region for model A. A resource can belong to multiple groups. For example, as a sales manager for model A, Linda may belong to another sales group to provide model A information.

You can then create a new resource group, identify parent group name and group usage, as well as assign group member information. Perform the following steps in HTML 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, click it to clear the row.
- 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.
- Only one parent record can be specified for a specific period of time. However, several child records can be active at once.
- Group role functionality is defined in the Forms version only. The group role is particularly useful when a group is assigned to a team.

Prerequisites

The JTFRS: Group Update Access profile must be set to "None."

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the People tab.

Steps

1. Select the Groups sub-tab.
2. In the Group window, click **Create**.
3. In the Create Groups window, enter the Group name.
4. Enter a description for the group.
5. Enter an email address for the group.

   No validation is made to determine if the email address is correct or even exists.
6. 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.
7. Use the drop-down list to select the group usage.
8. 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.

   c. In the Select a Resource window, 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.
9. Click **Create**.

   The Group Detail window opens with the new group information.

5.9 Defining Dynamic Groups

Use the Dynamic Groups window to define a group based on your criteria by using a SQL statement in the SQL Statement field. You cannot assign members to a dynamic group, nor can they be hierarchical.

After entering group name and usage information, you can then enter SQL statements in the SQL Statement field. Click the Check Syntax button to check your code for syntax errors before saving your work. This action creates a dynamic group, but not an actual group which you would find in the list of values.

A dynamic group is not a substitute for creating or updating a resource group and you can have both: a dynamic **and** a resource group which are named the same and may have the same members.

Example

Interaction Center's Telephony Manager uses Dynamic Groups for skill-based routing. In active mode, Oracle Telephony Manager routes calls according to defined rules. The active mode is the default mode of operation. In active mode, Oracle Telephony Manager uses skill-based routing, a dynamic call routing intelligence that delivers inbound calls to an agent who is appropriately skilled to meet the needs of the caller. When inbound calls arrive at the switch, the switch issues a routing request. Oracle Telephony Manager monitors the routing request, then applies skill-based routing rules, and identifies suitably skilled agents. Meanwhile, a representation of the call waits in the virtual queue within Oracle Telephony Manager. When a suitable agent becomes available, Oracle Telephony Manager responds to the routing request and instructs the switch to deliver the call to the agent’s extension through the Universal Work Queue, where more specific pre-defined rules may apply in directing the call. In a dynamic group, the database automatically updates information about individual group members.

The following code example shows how a dynamic group is created and the type of information returned, which is the dynamic routing executes the workflow/procedure to get an agent list.

```
Select Resource_ID from
JTF_IH_INTERACTIONS
where Party_ID=:CUSTOMER_ID
order by Last_update_date desc
```

Note: Interaction Center is the only application that should use Dynamic Groups.

Perform the following steps to define a dynamic group.

Prerequisites

Resource Manager must be configured with Call Center usage.

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Dynamic Groups**.
2. In the Dynamic Groups window, enter a group name in the Name field.
3. Select a group usage from the Usage field.
4. Select the effective dates for the group from the list of values (LOV) in the Start and End fields.
5. Enter a brief description of the group name and usage in the Description field.
6. Enter the SQL statement to define a group.
7. Click **Check Syntax** to check the code for syntax errors.
8. Choose **File > Save** to save the group.

   The new group name registers in the Group Name field in Resource Manager.

5.10 Viewing Group Hierarchy

Use the group hierarchy feature in Forms 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 the resource. You can restrict your view by resource category. Perform the following steps to view the hierarchy of a group.

Prerequisites

None

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Group Hierarchy**.
2. In the Group Hierarchy window, 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.

5.11 Viewing Role Details

The Role Details window provides information on a selected role such as the code, name, type, description, and the selected attributes.

Attributes aid in grouping different roles together when defining a resource reporting hierarchy. This hierarchy is used in sales product families, such as Sales Online and Telesales, to control the data access privilege (customer, sales lead, and sales opportunity) as well as sales forecast rollup and incentive compensation plan. It is also used for workflow notifications and escalations. You can have more than one attribute such as Admin and Manager as each has different functions. However, you would not select Lead and Manager, for example, because Lead is a subset of Manager. Perform the following steps to view a role's details.

Prerequisites

A role must exist before it can be viewed.

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the People tab in HTML.

Steps

1. Select the Roles subtab.
2. Narrow your search criteria by entering values in either the Role Code, Role Name, or Role Type fields. You can search all fields, or just one. You can also use wildcards to aid your search.
3. Click **Search**.

   The Role Summary window opens with a list of role types based on your search criteria.
4. Click the hyperlink of your preferred role.

   The Role Detail window opens.

5.12 Assigning Roles to Resources

Perform the following steps, in HTML, to attach a Role to a resource.

Prerequisites

Make sure that a Role Type exists with which you can associate the new Role.

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the People tab in HTML.

Steps

1. Select the resource under the Preferred Name column. (If you are assigning a role to an individual other than yourself, you can use the Quick Find or Advanced Search feature to locate the resource.)
2. Scroll to the bottom of the window to view the Resource Role section and perform the following:
   a. Select the Role Type from the drop-down menu.
   b. Select the Role from the drop-down menu.
   c. The Start Date defaults to the current date and you can leave the End Date blank.
3. Click **Update** to save your work.

5.13 Assigning Resources to Groups

Perform the following to assign a resource to a group.

Prerequisites

None

Responsibility

Resource Self Service Administrator

Navigation

Navigate to the People tab in HTML.

Steps

1. Select the resource under the Preferred Name column. (If you are assigning a role or group membership to an individual other than yourself, you can use the Quick Find or Advanced Search feature to locate the resource.)
2. Scroll to the bottom of the window that contains a Group Membership section and perform the following:
   a. Select the Group from the drop-down menu.
   a. Select the Role Type from the drop-down menu.
   b. Select the Role from the drop-down menu.
   c. The Start Date defaults to the current date and you can leave the End Date blank.
3. Click **Update** to save your work.

5.14 Defining Teams

You can only create a team in Forms. Perform the following steps to define a team.

Prerequisites

You must define a resource group.

Responsibility

- CRM Administrator or
- CRM Resource Manager

Navigation

Navigate to the Navigator - CRM (or CRM Resource Manager) Administrator window.

Steps

1. Select **Resource Manager > Maintain Resources > Teams.**
2. (Optional) Use the following procedure to find an existing resource team.
   a. On the application tool bar, click **View > Find**.
   b. In the Find Team window, 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.

Table 5–3 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.

5.15 Running a Group Audit Report

Use Resource Manager to run audit reports 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

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Resource Manager > Others > Requests > Run.**
2. Select **Single Request** and click **OK**.
3. Use the Name list of values (LOV) to select a report.
4. In the Reports window, select Group Audit Report from the list of reports and click **OK**.
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**.
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.

5.16 Viewing an Audit Report

You can monitor the status of an audit report to verify completion. Perform the following steps to view an Audit report.

Prerequisites

A Group Audit Report must run successfully.

Responsibility
CRM Administrator

Navigation
Navigate to the Navigator - CRM Administrator window.

Steps
1. Select **Requests > Run > View.**
2. In the Find Requests window, select the **All My Requests** option button and click **Find**.
3. In the Requests window, select a Group Audit Report to view.
4. 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.

5.17 Running a Group Structure Report

Use Resource Manager to run a Group Structure report detailing any changes made to a specific Parent or Child relationship of a resource group. The report details 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
None

Responsibility
CRM Administrator

Navigation
Navigate to the Navigator - CRM Administrator window.

Steps
1. Select **Resource Manager > Others > Requests > Run.**
2. Select **Single Request** and click **OK**.

3. Use the Name list of values (LOV) to select a report.
4. In the Reports window, select Group Structure Report from the list of reports and click **OK**.
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**.

5.18 Viewing a Group Structure Report

You can monitor the status of an audit report to verify completion. Perform the following steps to view your Group Structure report.

Prerequisites

You must first run a Group Structure Report successfully.

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Requests > Run > View.**

2. Select the **All My Requests** option button.
3. Click **Find**.
4. In the Requests window, 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.

5.19 Running Resource Skills Report

This report displays the skills a resource has listed using the HTML-based Resource Manager. You can run a Skills Report either by resource or group. If you choose to run a Skills Report by resource, then any direct reports under the resource will be included in the report. If you choose to run a Skills Report by group, then the entire group's skill set will be displayed.

Prerequisites

Your resources must have:

a. Skills listed using the HTML-based Resource Manager
b. Have a manager listed if you are running a report based on resource.

Responsibility

CRM Administrator

Navigation

Navigate to the CRM Administrator window.

Steps

1. Select **Resource Manager > Others > Requests > Run.**
2. Select **Single Request** and click **OK**.
3. Use the Name list of values (LOV) to select the Resource Skills Report and click **OK**.
4. Use the LOV in the Report Type field to select either Resource or Group and click **OK**.

5. Depending on your choice, use the LOV in the corresponding Resource or Group field to find your selection.
6. (Optional) If you do not want the report to run as soon as possible, click **Schedule** to change the time frame when you want the report to run.
7. (Optional) Click **Options** to determine who should be notified when the report is complete and where you want to print the output.
8. Click **Submit**.

5.20 Viewing Resource Skills Report

You can monitor the status of an audit report to see when it has been successfully completed. Perform the following steps to view your Resource Skills report.

Prerequisites

You must first run the Resource Skills Report successfully.

Responsibility

CRM Administrator

Navigation

Navigate to the CRM Administrator window.

Steps

1. Select **Requests > Run > View.**
2. Select the **All My Requests** option button.
3. Click **Find**.
4. Select your Group Structure Report and click **View Log**.

6 Troubleshooting Resource Manager

This section covers the following topics:

- Common Implementation Errors
- Error Messages
- Frequently Asked Questions (FAQs)

6.1 Common Implementation Errors

> **Note:** The Oracle CRM Diagnostic Tool is useful in pinpointing problems with the setup and configuration of the many CRM modules. It is available through the CRM System Administration Console.
>
> This section is by no means exhaustive and should be referenced with each release.

This section contains information on some of the common implementation errors associated with implementing Resource Manager.

6.1.1 Unable to Import a Resource

Action: Perform the following procedures:

1. Run the concurrent program "Resource Manager Diagnostics" available under CRM Administrator Responsibility. If it is not available, then perform the following:

    a. Log on using the System Administrator responsibility.

   b. In the "Executable" option, under "Concurrent Program", query for "Resource Manager Diagnostics."

   c. Enable it by checking the checkbox.

2. After the concurrent program completes, view the log file generated by pressing the "View Log" button. See if any errors are reported.

3. Correct any errors as reported in the concurrent program log. Then, import again.

6.1.2 Unable to Import a Resource From Human Resources

Cause: Form JTFRSSEC does not compile after applying the latest patch.

Action: Compile the Form based on following steps.

```
cd $AU_TOP/forms/us
f60gen module=JTFRSSEC.fmb userid=apps/apps
mv JTFRSSEC.fmx $JTF_TOP/forms/US
cd $AU_TOP/resource/US
f60gen module=JTFRSSEC.pll userid=apps/apps module_type=library
chmod 755 JTFRSSEC.plx
```

6.1.3 Unable to Save a Resource

Action: Performing the following checks:

1. In SQL*Plus, connecting as apps/apps, enter the following:

   ```
   SQL> desc xmlgen
   ```

   If this returns the statement that object xmlgen does not exist, then ensure that "apps" has execute privilege on "xmlgen."

2. In SQL*Plus, connecting as apps/apps, enter the following:

   ```
   SQL> select status from all_objects where object_name = 'JTF_USR_HKS';
   ```

   If this returns a status of ’INVALID,’ then alter package JTF_USR_HKS and compile the body. Repeat this check until the status becomes 'VALID.’

3. In SQL*Plus, connecting as apps/apps, enter the following:

   ```
   SQL> select status from all_objects where object_name = 'JTF_RESOURCE_UTL';
   ```

   If this returns a status of ’INVALID,’ then create this view in the apps schema and compile the JTF_RESOURCE_UTL package body.

   Create or replace view IEM_EMAIL_ACCOUNTS_V as:

```
SQL> select b.server_group_id interaction_center_id,
            a.account_name config_name,
            to_char(a.email_account_id) value_type
     from iem.iem_email_accounts a, iem.iem_email_icntr_maps b
     where a.email_account_id=b.email_account_id;
```

6.1.4 Unable to See Resource Name

Cause: This problem can occur in the CRM or Common Application Components modules, the LOVs, and in other similar items.

Action: In SQL*Plus, connecting as apps/apps, enter the following:

```
SQL> select count(*) from jtf_rs_resource_extns where source_name is null;
```

If count(*) is non-zero then run the concurrent program "Synchronize Employees" using the CRM Administrator responsibility.

6.1.5 Cannot Invoke Salesperson Form from AR Menu

Cause: This problem occurs when invoking the Salesperson form from the Accounts Receivables menu. It occurs under the following circumstances:

(Navigation path: **Setup > Transactions > Salesperson**)

- Double click from the navigator menu and a small blue window with a red bar(row) is received with no legible fields or label markings.
- Press the Tab or Enter key and a calendar window appears also with no legible fields/label markings.

In either case, the user is unable to close the form or application unless the File > Close or Exit toolbar menu option is used.

Action: apply patch 1799597. Read the README mentioned in the patch.

6.1.6 Accounting Flexfield LOV Display Parent Values

Action: Perform the following steps to define the accounting flexfield:

1. Navigate to the General Ledger module: **GL > Setup > Financials > Flexfields > Key > Values**.

   In Find form, check for find values by Key flexfield. In the Title Field, choose from the list of values "accounting flexfield" and click Find. There is an extensive list of values. To the right, there is a box called "Effective" title. Check for it's other title "Hierarchy, Qualifiers." A parent check box is checked for some of the values and not checked for others.

2. You can add values and check them as parent but this is not necessary, you can simply write down a few values that are checked as parents. (For example, the first value 1000- Total asset is checked as one.)

3. Navigate to Accounts Receivables: Setup > Transactions > Autoinvoice > Salespersons.

   Receivables uses the general ledger accounts that you enter there in combination with your AutoAccounting rules to determine the default revenue, freight, and receivable accounts for your invoices.

4. Create a new salesperson. Enter a name and a sales credit type from the list. In the next three fields enter the Accounting Flexfield for your Revenue, Freight, and Receivables Accounts.

   If you open the list and see account aliases, click **OK**. A form in which you can enter a department value and an account value appears.

   In the account values list, verify the parent values observed in step 2. (For example, the first value might be 1000- Total asset.)

5. You can choose this value and save the transaction.

It must be emphasized again that the parent values should not appear in the list and you should not be able to select them. These are only summary accounts and not accounts you can use for regular processes, which means you cannot enter amounts to accounts which are checked as parents.

6.1.7 List of Values (LOV) Are Not Populated in the Hold Reasons Field

Cause: Incentive Compensation uses Resource Manager to set up sales representatives and sales compensation group hierarchies. If the Hold Reason field is not populated in the Compensation tab, then create a lookup type.

Action: Perform the following steps:

1. Navigate to the Application Object Library Lookups window.
2. Enter in the type field: "JTF_RS_HOLD_REASON_TYPE"
3. In the User Name field, enter the same value again.
4. In the Application field, select **CRM Foundation** from the LOV.
5. In the Access Level radio group, select **User**.

6. In the detail block, enter suitable values for Code, Meaning, and Description fields.

   Note that what you enter in the Meaning field is what the LOV for Hold Reason field in the Define Resource form will display.

6.1.8 List of Values (LOV) Are Not Populated in the Support Site Fields

Cause: Support site information, which displays in Assignment Manager, is actually attached to a resource in Resource Manager. You can attach the information from an LOV in either the HTML or Forms-based module. The List of values are populated from several sources including Teleservice with the Customer Support responsibility.

Action: Add support sites based on previously defined addresses. The city of the address will populate the LOVs. Perform the following:

1. Navigate to the Navigator > Customer Support window.
2. Select **Customer Management > Contact Center**.
3. In the Caller Type field, select either Organization or Person.
4. In the Organization field, select your organization.
5. Select the Address tab.
6. In the Status column, select **Active**.
7. In the Address1 column, select the appropriate address from the LOV.

   The City field automatically populates.
8. In the Usage field, select **Support Site**.
9. Select Active in the Usage Status field.
10. Save your work.

6.1.9 JTF-Post Vertical User Hook

Cause: This error occurs when attaching a role type of Sales Compensation to a resource.

Action: First determine whether or not the resource has been saved. If the result is:

- No, then save the resource, then try again.

- Yes, then assign a different role type such as Service, or, Sales and Telesales to the resource, and confirm whether or not you are able to save. If you are able to assign a role other than Sales Compensation to a "saved" resource, but, are unable to assign the Sales Compensation role, then log a bug against Oracle Sales Compensation application.

6.1.10 Same Resource Showing Twice in Define Resource Form

Cause: In this case, both resources have the same transaction number, but one record displays the salesperson number, and the other does not.

To verify this problem, perform the following steps:

1. In the Define Resource form, note the resource number for both the records.
2. If the resource number is the same (for example, 10015), then run the following query:

```
SQL> select res.resource_id,sr.salesrep_id,sr.org_id
     from jtf_rs_resource_extns res,jtf_rs_salesreps sr
     where res.resource_id = sr.resource_id
     and res.resource_number = 10015;
```

3. If the output of this query results in two or more records with the **same** resource_id, and the **same** org_id, but, different salesrep_id then it is bad data. For example, the sample output following would be considered bad data;

```
RESOURCE_ID       SALESREP_ID          ORG_ID
----------------- -----------------    ----------
100000016         100000019            2
100000016         100000054            2
```

   This type of data can never be created using the Define Resource form, or any of the Resource Manager public APIs.

Action: To clean up the data, perform the following steps:

1. There are two records, one, for example, with a salesrep number non NULL value and other with a NULL value. Identify which is the one you want to remove. To Identify the IDs, run the following statement:

```
SQL> select res.resource_id,sr.salesrep_id,sr.org_id,
         sr.salesrep_number
     from jtf_rs_resource_extns res,jtf_rs_salesreps sr
     where res.resource_id = sr.resource_id
     and res.resource_number = 10015;
```

This will return two records. Note down the resource_id, salesrep_id, and the org_id of the record which you want to delete.

2. Run the following delete statement. Assuming, you decided to delete record with salesrep_id 100000019, org_id 2, it would look like:

```
SQL> delete from jtf_rs_salesreps
     where salesrep_id = 100000019
     and org_id = 2
     and resource_id = 100000016;
```

This should cleanup all bad data.

> **WARNING: You are actually deleting physical records from the database. This has the RISK of leaving behind dangling foreign keys in other tables in other applications. Confirm the check for FOREIGN KEYS before deleting records as suggested above. Otherwise, you may end up corrupting your database.**
>
> **Contact Oracle Support in case of any doubt.**

6.1.11 JTF_RS_TERR_EDDT_GRTR_SRP_EDDT

Cause: This is a data problem. This error occurs when the territory Start and End dates are out of range with salesperson dates.

Action: Perform the following steps:

1. Find out the maximum Start_date_active value and minimum End_date_active value for a salesrep_id across all org_id from JTF_RS_SALESREPS table. (Be aware that the end_date_active value can be NULL.)
2. For the salesrep_id in step 1, find the Start_date_active and End_Date_active from RA_SALESREP_TERRITORIES table. (Be aware that the Start_date_active and end_date_active values can be NULL.) You may get multiple records.
3. For every record in step 2, verify whether or not the dates fall within the dates in Step 1.
   - If yes, then no further action required.
   - If no, then:

   a. Update the Start_date_active, End Date_active in RA_SALESREP_TERRITORIES Table with the Dates from Step1.

b. Repeat Steps 1 through 4 for all the salesrep_id in JTF_RS_SALESREPS table.

6.1.12 Invalid User Error

Invalid User- Resource link, Contact Your System Administrator

This problem has been observed in the Service Request form, however, it could occur in other places too. While creating or updating a Service Request in the "Owner" field, it is possible to pick a resource from the LOV, and get the "Invalid User - Resource link" error.

Cause: This problem occurs if the currently logged in user (as defined in FND_USER), is **not** mapped to a proper resource who you are trying to update the SR with.

Action: Ensure that the user ID of the resource that you select in the LOV matches with the one that the user is currently logged in as. This restriction is due to the fact that in trying to create interactions, there is a validation that the user must be a resource.

6.1.13 Product Name Displays Improperly

When selecting a product, the product appears as "X" instead of displaying the product name.

Cause: When setting up Inventory, the item flexfield segment was not compiled.

Action: Compile the item flexfield segment by performing the following:

1. Log in to the Forms interface with System Administrator responsibility.
2. Select **Flexfield>Key>Segments**.
3. Run a query for Application "Oracle Inventory" and Flexfield Title "System Items" by performing the following:
    a. Select **View>Query by Example>Enter**.
    b. In the newly hilighted Application and Flexfield Title fields enter "Oracle Inventory" and System Items".
    c. Select **View>Query by Example>Run**.
4. In the Structures menu, select "SYSTEM_ITEMS" and click the **Compile** button.

6.1.14 Performance Issue When Selecting the Resource Details Button

Cause: When selecting the Resource Details button, forms do not display for up to thirty minutes.

Action: A fix for this problem is available in a patch release. Details about this patch and its availability are found on the metalink Web site. As an interim solution, you can run the Synchronize Employees concurrent program and set the Get New Employees parameter to "Yes".

6.1.15 Synchronize Employee Concurrent Program Does not End Date Resources

Cause: End date for terminated resources does not display properly when running the Synchronize Employees Concurrent program.

Action: A fix for this problem is available in a patch release. Details about this patch and its availability are found on the metalink Web site. When running the Synchronize Employees concurrent program, you must run the concurrent program when the employee is no longer active. For example, if the employee is today and inactive starting tomorrow, you must run the concurrent program tomorrow, to end date the resource in Resource Manager. If the Employee is end dated in HR with a previous date, then run the concurrent program today, resource will be end dated with sysdate-1.

6.2 Error Messages

This section contains information on some of the error messages associated with implementing Resource Manager.

6.2.1 APP-FND-00668

Routine FDFBKS found no row in FND_ID_FLEX_SEGMENT.

Cause: This is a flexfield issue.

Action:

1. Define the Territory Flex field.
2. Recompile.

6.2.2 APP-FND-01934: ORA-01400

Cannot insert NULL into ("CN"."CN_ROLE_QUOTA_CATES"."ROLE_MODEL_ID") in Package CN_ROLE_QUOTA_CATE_PVT

Cause: This error can occur when trying to save a new role.

Procedure Create_Role_Quota_Cate

Action:

1. Verify whether or not CN_ROLE_QUOTA_CATE_PVT is valid in the database.
2. Select status, owner, object_type from dba_objects where object_name='CN_ROLE_QUOTA_CATE_PVT ';
3. If invalid, compile it and try again.
4. If valid then, make ROLE_MODEL_ID column null in the following tables:
   - CN_ROLE_QUOTA_CATES
   - CN_SRP_QUOTA_CATES_ALL
   - CN_SRP_ROLE_DTLS_ALL
5. Recompile and re-run.

> **Note:** If this error continues, refer to the OIC (Oracle Incentive Compensation) Implementation documentation for additional troubleshooting under the topic: Assign Resources to Roles and Groups.

6.2.3 APP-PER-50022

APP-PER-50022: Oracle HR could not retrieve a value for the User Type profile option.

Cause: This error occurs when pressing the "View" Button in Define Resource Form.

Action: Verify that it is set properly for your responsibility. Ensure that the current resource is of type "Employee." Update the profile "HR: User Type" at the application level by selecting a valid value from the LOV. If you select "HR User", then verify that the user currently logged in has the "US HRMS Manager" responsibility.

6.2.4 APP-PER-500022

Cause: This error can occur when trying to access employee information:

APP-PER-500022 Oracle Human Resources could not retrieve a value for the user type profile option.

Action: Ensure that the profile option HR: User Type is set correctly for your responsibility. This occurs when there is a shared installation of HR, and the value for profile option HR:User Type in corresponding responsibility level is not properly set.

Set up profile option HR: User Type to HR user in responsibility level. If the profile option cannot be updated in responsibility level, then update it in the responsibility level from application developer responsibility.

6.2.5 HTTP 404

Cause: This error occurs while trying to log in to an HTML application. It is an environment issue. Perform the following steps to correct the problem.

Action:

1. Close Netscape.
2. Remove fat.db, netscape.hst, and cookies.txt.
3. Clear disk cache and memory cache.
4. Log in again.

6.2.6 ORA-01422

Cause: This error can also occur when invoking the Accounts Receivables forms.

- FRM-40735: PRE-FORM Trigger Raised Unhandled Exception ORA-01422
- ORA-01422: Exact fetch returns more than requested number of rows.

Action: Perform the following procedures:

1. In SQL*Plus, connecting as apps/apps, enter the following:

```
SQL> set pages 999
SQL> set long 9999
SQL> select text from dba_views where view_name = 'RA_SALESREPS';
```

   Check to see if the results of the FROM clause in the view definition list any of the following tables or views:

- RA_SALESREPS_ALL RA
- AS_SALESFORCE ASF
- RA_CUSTOMERS RACUS
- PER_PEOPLE_X HR
- AS_LOOKUPS ASL

   If so, then log a bug against Accounts Receivable.

2. In SQL*Plus, connecting as apps/apps, enter the following:

```
SQL> select table_name
     from all_synonyms
     where synonym_name ='RA_SALESREPS_ALL' and owner = 'APPS';
```

- If the result of this query returns RA_SALESREPS_ALL, then Salesperson migration has not happened. If you do want the migration to happen, then apply the following patches:
  - 1638958
  - 1757827

  or else, log a bug against Accounts Receivable.

- If the result of this query returns JTF_RS_SALESREPS, then the salesperson migration has occurred. In this case, run the following in SQL*Plus connected as apps/apps:

```
SQL> delete from jtf_rs_salesreps
     where salesrep_id=-3 and org_id is null;
```

  If the previous command deletes one record, then perform a COMMIT, otherwise, perform a ROLLBACK operation.

  WARNING: You are actually deleting physical records from the database. This has the RISK of leaving behind dangling foreign keys in other tables in other applications. Confirm the check for FOREIGN KEYS before deleting records as suggested above. Otherwise, you may end up corrupting your database.

  Contact Oracle Support if you have any questions.

6.2.7 ORA-01422

ORA-01422: Exact fetch returns more than requested numbers of rows.

Cause: This occurs while adding a group role to a resource in Define Resource Form, and indicates that an unexpected error was encountered in INSERT_REP_MANAGER.

Action: To resolve this, contact your system administrator.

Alternate Cause: This problem can occur when there is more than one snapshot view log on JTF_RS_REP_MANAGERS table.

Alternate Action: To confirm, run the following query in SQL*Plus, connected as apps/apps:

```
SQL> insert into rep_temp
       (denorm_mgr_id,
        resource_id,
        person_id, category,
        manager_person_id,
        group_id,
        hierarchy_type,
        created_by,
        creation_date,
        last_updated_by,
        last_update_date,
        last_update_login,
        reports_to_flag,
        start_date_active,
        end_date_active,
        par_role_relate_id,
        child_role_relate_id,
        object_version_number)
     values
       (-9, 1, 1, 'employee', null, 1, 'x', -1, sysdate, -1, sysdate,
        -1, 'y', sysdate, null, -1, -1, 1);
```

If the result is:

ORA-01422: Exact fetch returns more than requested numbers of rows,

then more than one snapshot log exists. There should be only one snapshot log on the table MLOG$_JTF_RS_REP_MANAGERS. Verify if there are more, and drop them. If after ensuring that there is only one snapshots of log MLOG$_JTF_RS_REP_MANAGERS, and the error still occurs, log a bug against Oracle Sales.

6.2.8 ORA-20002

Cause: There are several issues that can affect migration of salesperson data. Errors can occur when accessing the following Accounts Receivables forms:

- ARXTWMAI

  Transaction Entry: FRM-40735 Pre-form trigger raised unhandled exception ORA-20002.

- ARXRWMAI

  Receipt Entry: FRM-40735 New form instance trigger raised unhandled exception ORA-20002.

- ARXCWMAI

  Account Detail: FRM-40735 WHEN-NEW-FORM-INSTANCE trigger raised unhandled exception ORA-20002.

Action: To diagnose and resolve, perform the following checks:

1. In SQL*Plus, connecting as apps/apps, enter the following:

   ```
   SQL> set pages 999
   SQL> set long 9999
   SQL> select text from dba_views where view_name = 'RA_SALESREPS';
   ```

   Check to see if the results of the FROM clause in the view definition list any of the following tables or views:

   - RA_SALESREPS_ALL RA
   - AS_SALESFORCE ASF
   - RA_CUSTOMERS RACUS
   - PER_PEOPLE_X HR
   - AS_LOOKUPS ASL

   If so, then log a bug against Accounts Receivable.

2. In SQL*Plus, connecting as apps/apps, enter the following:

   ```
   SQL>select table_name
      from all_synonyms
      where synonym_name ='RA_SALESREPS_ALL' and owner = 'APPS';
   ```

   If the result of this query is RA_SALESREPS_ALL, then the salesperson migration has **not** happened. If you do want the migration to happen, then you must apply the following patches:

- 1638958
- 1757827

or else, log a bug against Accounts Receivable.

6.2.9 ORA-4062

ORA-4062: Signature of package "APPS.JTF_RS_RESOURCE_PVT" has been changed.

Cause: This is an environment error in which the package body and spec are out of sync.

Action: Recompile all JTF forms and libraries. This process will not work if directories contain invalid characters.

Problem: Ran the API Jtf_Rs_Role_Relate_Pub.create_resource_role_relate and it stops with an error:

6.2.10 ORA-20000

The API JTF_RS_ROLE_RELATE_PUB.CREATE_RESOURCE_ROLE_RELATE, generates the following error message: ORA-20000 buffer overflow.

Cause: This error is caused by the table space being full.

Action: A future release will contain more specific error message such as the following:

ORA 01653: Unable to extend table CN.CN_SRP_QUOTA RULES_ALL by 515 in tablespace CND

6.3 Frequently Asked Questions (FAQs)

The following are frequently asked questions. Answers to these questions may help you in troubleshooting problems with the Resource Manager.

6.3.1 Does JTF_RS_REP_MANAGERS Table Denormalize RESOURCE_ID?

Answer: Yes, in the PARENT_RESOURCE_ID column in this table.

6.3.2 How Are Role Types Associated to the Applications?

Where do you define the role type? In the Meaning field for defining the Role Type? If yes, how is this controlled as the field doesn't contain an LOV and it is a free form entry. Also should the customer use one of the defined meanings for the application/Role Type association?

Answer: Navigation steps to define a Role Type:

With the CRM Administrator responsibility, select **Resource Manager > Setup > Role Types**.

The content in the "Meaning" field is what is displayed in all LOV for Role Type.

When you invoke the "Role Types" form, you see a numerous records. Many of them are shipped out-of-the-box as seeded values. Customer can add new Role Types, or, change the Meaning, Description, or Dates of the seeded ones. But, customers cannot delete seeded values. To determine which ones are seeded, and which ones are added by the Customer, navigate to each Role Type record, and see if the "Delete" option in the tool bar is enabled. It is enabled for new records, not for seeded values.

6.3.3 How is the Role Associated to the Application?

Is this done by the Type (Role Type) on the Roles definition form?

Answer: Roles are associated one-to-many with a Role Type. Just like Role Type, we ship quite a few Roles for each Role Type out-of-the-box. Individual Applications use both Role Type and Role. Some applications use it as a filter mechanism, while some use it for reporting.

Example: If you have 100,000 Employee Resources in the system, and you are only interested in the subgroup Salespersons, then an application such as Oracle Sales and Marketing assigns a Role of type Oracle Sales to the those resources and write logic to only display those salespersons in their application LOVs.

There is no association necessarily between Role Type and an Application; except that the names of the Role Types appear like Application Names.

6.3.4 Are Resources Org Striped?

How about **Salespersons?**

Answer: Resources are NOT org striped, but salespersons are.

Example: If you have an Employee Resource R1 who is a Salesrep in multiple orgs (lets say org_id 100, 200, 300), then in the Define Resource window, when you query the Resource in the context of Org 100, you see the Resource information, and the Salesrep information for Org 100. However, if you are in the context of Org 150, then only the Resource displays, but none of the Salesrep information such as Salesrep Number or Sales Credit Type displays in the header and the Receivables tab.

The same is true with all other types of Resources like Party, Partner, Supplier Contact, Other, and To-Be-Hired.

6.3.5 IS There a One to One Mapping Between an FND_USER and Resource?

Answer: Use the "Define User" window in AOL to assign an Employee, Party, and Supplier Contact to the same FND User.

6.3.6 What Can I Import into Resource Manager?

Answer: Even though its possible to attach an Employee, Party, Supplier, or Contact to the SAME FND User, you cannot import all of them into Resource Manager. You can only import one: Employee, Party, or Supplier Contact.

6.3.7 How Do I Send Notifications?

I've attached a Resource Group to a Task. How can I send notifications to all members of this group?

Resource Groups are not tied to Workflow groups. So, when a workflow is in setup, for example, in Task Manager, to send notification to the Task Owner, how can I ensure that if a Resource Group is assigned an owner to the Task, then the notification will be sent to all the members of that Resource Group automatically?

Answer: Examine the example of Task Manager.

Decide which workflow process to launch by defining a new workflow process under the workflow item: JTFTASK (User name for seeded workflow: Workflow for Task Manager.) Within the new workflow process, call a workflow (and PL/SQL) function in a loop, which retrieves the members of the group and send the notification to all the members.

An example of SQL code to get all the GROUPS and RESOURCES, under one GROUP (one hierarchical level):

```
SELECT  group_id  group_id,  resource_id  group_resource_id,  'INDIVIDUAL'
```

```
resource_type
FROM jtf_rs_group_members UNION
SELECT rgm.group_id  group_id,  rgr.group_id  group_resource_id,  'GROUP'
resource_type
FROM jtf_rs_group_members rgm, jtf_rs_grp_relations rgr
WHERE rgm.group_id = rgr.related_group_id;
```

The query results appear like the following:

GROUP_ID	GROUP_RESOURCE_ID	RESOURCE_TYPE
5	15	GROUP
5	21	INDIVIDUAL
5	175	GROUP
5	199	INDIVIDUAL
15	1	INDIVIDUAL
15	5	GROUP
15	689	INDIVIDUAL

Note: The GROUP_RESOURCE_ID stores RESOURCE_ID for Resource_type = 'INDIVIDUAL', and Group_ID for Resource_type = 'GROUP').

6.3.8 Why Are Party and Partner Treated Differently?

Why are Party, and Partner treated as separate Resource Categories in Resource Manager? Should they not be combined into just one category?

Answer: The parties of party_type 'PARTY_RELATIONSHIP' can be imported as a resource of category 'PARTY' or 'PARTNER'. But there are some other party types that can be brought in only as category PARTY (for example, PERSON) and those that can be brought in only as PARTNER (for example, Organization.) The categories need to exist independently rather than being merged.

6.3.9 What is the Geo Override and Inside City Limits Fields?

What is the significance of fields "Geo Override", and "Inside City Limits"? How should these fields be used in the Define Resource window when defining a Salesperson?

Answer: The Geo Override value associates the salesperson with a unique tax jurisdiction. Both fields should normally be used if you have installed a sales tax vendor of type Vertex Taxware Sales. Oracle recommends you use Tax System or Vertex Quantu.

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 should typically be enabled only if your sales tax vendor is Vertex Quantum.

Geocodes are used by tax engine to identify taxing jurisdiction. A geocode is typically needed when the state, zip, and city fields of an address do not uniquely identify the exact taxing jurisdiction. For example, same city and zip can be found in multiple counties. Inside city limits adds more to that geocodes. For example a city has different tax rates for city limit, in this case the city will have two different jurisdictions: one inner city and another that is outer city. The tax will be calculated accordingly.

Third party tax engines like vertex and taxware recognize such complicated geocode.

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.

6.3.10 Where Can I Set Up Sales Credit Types?

In the Define Resource Form, under "Receivables" tab, there is a field labeled "Sales Credit Type". Where do values in the LOV for this field come from?

Answer: They come from Order Management. Navigate to: **Order Management > Set up > Sales > Credit Types**.

6.3.11 What are the Attributes of an Employee Resource?

What are the attributes of an Employee Resource that are kept in SYNC with HR? What is the list of all HR denormalized columns in Resource Manager.

Answer:

```
SOURCE_ID    (mapped to Person Id in HR)
MANAGING_EMPLOYEE_ID
SOURCE_NAME
SOURCE_NUMBER
SOURCE_JOB_TITLE
SOURCE_EMAIL
SOURCE_PHONE
SOURCE_ORG_ID
SOURCE_ORG_NAME
SOURCE_ADDRESS1
SOURCE_ADDRESS2
SOURCE_ADDRESS3
SOURCE_ADDRESS4
SOURCE_CITY
SOURCE_POSTAL_CODE
SOURCE_STATE
SOURCE_PROVINCE
SOURCE_COUNTY
SOURCE_COUNTRY
SOURCE_MGR_ID
SOURCE_MGR_NAME
SOURCE_BUSINESS_GRP_ID
SOURCE_BUSINESS_GRP_NAME
SOURCE_FIRST_NAME
SOURCE_MIDDLE_NAME
SOURCE_LAST_NAME
SOURCE_CATEGORY
SOURCE_STATUS
SOURCE_OFFICE
SOURCE_LOCATION
SOURCE_MAILSTOP
```

6.3.12 What Are the Responsibilities Associated With Resource Manager?

What are the responsibilities associated with Resource Self Service (HTML) functionality? What are the Responsibility names for "Super User", and "Regular User"?

Answer:

- Super User: Resource Self Service Administrator
- Regular User: CRM Application Foundation User

6.3.13 How Does the Employee Button in the Resource Summary Page Appear?

Answer: If the user is logged in with "Resource Self Service Administrator" responsibility, and if the value of the profile "JTFRS: Employee Resource Update Access" is set to "ANY," then, the Create button for Employee will appear in the Resource Summary page.

6.3.14 How Does the Create Button in the Groups Summary Page Appear?

Answer: If the user is logged in with "Resource Self Service Administrator" responsibility, AND if the value of the profile "JTFRS: Group Update Access is set to "ALL" then, the Create button for Groups will appear in the Resource Groups Summary page.

6.3.15 How are Supplier Contact Type Resources Set Up?

Explain the detailed steps in defining a supplier contact resource such that it can be imported in Resource Manager.

Answer: Perform the following steps.

Responsibility: Purchasing, Vision Operations (USA)

Navigation: Supply Base > Suppliers

Steps:

1. When the appropriate supplier record has been found, select the 'Supplier' icon at the bottom right hand corner.
2. In the 'Contacts' tab, enter the supplier contact name, telephone number and their email address in the Mail Stop field.
3. Switch responsibility to CRM Administrator.
4. Select Resource Manager > Maintain Resources > Import Resources -> Select Resource category.
5. Supplier Contact > choose Contact as previously created. Find, then Create resource. View using Resource details.

6.3.16 How are Support Site IDs in Resources Set Up?

Explain the detailed steps in defining a support site such that it can be associated to a Resource Manager.

Answer: Perform the following steps.

Responsibility: Customer Support.

Navigation: Customer Management > Contact Center

Steps:

1. In the Caller Type field, select either Organization or Person.
2. In the Organization field, select your organization.
3. Select the Address tab.
4. In the Status column, select Active.
5. In the Address1 column, select the appropriate address from the LOV.
6. The City field automatically populates.
7. In the Usage field, select Support Site.
8. Select Active in the Usage Status field.
9. Save your work.

6.3.17 How is Data in JTF_RS_GROUPS_DENORM Populated?

Explain the detailed steps by which resource group hierarchy information is denormalized / flattened in this table.

Answer: The following example illustrates the answer.

Example:

- Group G1 is a parent of group G2
- Group G2 is a parent of group G3
- Group G3 is a parent of group G4

- Group G1 is a parent of group G5
- Group G5 is a parent of group G6

The following table depicts group information.

Table 6–1 Group Information

Group Name	Group ID
G1	100000001
G2	100000002
G3	100000003
G4	100000004
G5	100000005
G6	100000006

6.3.18 How Are Records Populated?

How are records populated in JTF_RS_GROUPS_DENORM table for the previous example?

Answer:

Table 6–2 Group Data

Group_Id	Parent_Group_Id	Immediate_parent_flag	Denorm_Level
100000001	100000001	N	0
100000002	100000002	N	0
100000003	100000003	N	0
100000004	100000004	N	0
100000005	100000005	N	0
100000006	100000006	N	0
100000002	100000001	Y	1
100000003	100000002	Y	1
100000003	100000001	N	2
100000004	100000003	Y	1
100000004	100000002	N	2
100000004	100000001	N	3
100000005	100000001	Y	1

Table 6–2 Group Data

Group_Id	Parent_Group_Id	Immediate_parent_flag	Denorm_Level
100000006	100000005	Y	1
100000006	100000001	N	2

Note: DENORM_LEVEL column is new in our current release. It DOES NOT exist in CRM 11.5.6 Family Pack.

6.3.19 How Can Employee Number Generation Be Controlled?

Explain the steps by which Employee Number can be manually entered while creating an Employee Resource.

Answer: Perform the following steps:

Responsibility: US HRMS

Navigation: Work Structures > Organization > Description.

Steps:

1. Query the Business Group you want to control the generation of Employee number.
2. In the Organization Classification section Select "Business Group"
3. Click on Others Button.
4. Chose Business Group info. This will invoke a Flex Field.

In the flexfield one segment is defined as Employee number generation. Depending on the value of this segment the system decides whether or not the number needs to be manually entered/or be automatically generated.

6.3.20 Can I Use Netscape's Back Button in Resource Manager?

There is a bug in the Netscape browser that can affect Resource Manager. Do not use the Back button, as you may loose your data. It is recommended that you use the Resource Manager user interface (UI). The Internet Explorer browser does not have this issue.

6.3.21 How Many Contacts Can Be Imported For a Supplier Site?

Can you import contacts for just one supplier site?

Answer: If you want to import a supplier contact, you must enter the supplier name and site. In the Payables Supplier Form, you can specify contacts for each supplier site.

Responsibility: Customer Support

Navigation: Resource Management > Maintain Resources > Import Resources

Steps:

1. Select **Supplier Contact** from the Resource Category field.
2. Select your chosen name from the list of values (LOVs).
3. Select your chosen address from the LOVs.
4. Select your chosen Supplier Contact from the LOVs.

If there are multiple addresses and supplier contacts, then you can only select one to import into Resource Manager at a time.

Required fields are Supplier Name and Supplier Site.

6.3.22 How Can I Import Salesrep Information?

How can I import Salesrep information from a legacy or third party system?

Answer: Use the API of your HR system and Resource Manager public API, JTF_RS_RESOURCE_PUB. Create_Resource ( ), to import employees if you want to import employee data from a legacy HR system. For details of Resource Manager public APIs, see *Oracle Common Application Components API Reference Guide*.

6.3.23 Which API Returns all Workflow Roles for a Specific Resource ID?

Which API Returns all Workflow roles for a resource when provided with a specific resource ID?

Answer: The get_wf_role procedure in package JTF_RS_WF_INTEGRATION_PUB returns all workflow roles for a resource when provided with a specific resource ID. This procedure contains the following function:

```
FUNCTION get_wf_role(p_resource_id IN number) RETURN varchar2
 IS
```

```
l_role_name         wf_local_roles.name%TYPE;
l_orig_system       wf_local_roles.orig_system%TYPE;
l_orig_system_id    wf_local_roles.orig_system_id%TYPE;
```

When the user ID is provided as an input value, the function returns the name of the Workflow role, its original system, and its original system identification.

6.3.24 How do I display Flexfields in a JSP/HTML page within Resource Manager:

What are the steps to display a flexfield in a JSP/HTML page within the HTML version of Resource Manager?

Answer: You cannot perform this action because the HTML version of Resource Manager does not support Flexfields.

6.3.25 Which Partner Categories Are Terminated in Resource Manager?

Which partner categories are terminated in Resource Manager after running the Number of Days profile option?

Answer: The Number of Days profile option terminates resources in Resource Manager a specified number of days after they have been terminated in Human Resources. This profile option only terminates the partner category of resources.

6.3.26 How do I Enable Flexfields for the HTML Version of Resource Manager?

Is there a different set of steps to enable flexfields for the HTML version of Resource Manager? Enabled flexfields in the 'Groups' and 'Employees' region of Resource Manager. When user navigates to the Groups and Employees regions in the Forms-based interface, enabled flexfields are displayed. However, they are not displayed under the Employee and Groups tab of the JSP generated HTML page.

Answer: Resource Manager HTML currently does not support Flexfields. However, this feature will be available in a future release.

6.3.27 Why does the Synchronize Employee Concurrent Program Always update every record's last_update_date parameter?

The Synchronize Employee concurrent program updates every record's last_update_date even if the record is not changed. Is this a bug?

Answer: No. The program is designed that way to update the entire set using a single SQL command, which results in the observed behavior.

6.3.28 Error Encountered When Running the Synchronize Employee Concurrent Program

The Synchronize employee concurrent program imports new employees into Resource Manager. When attempting to modify the new resource encountered error:

" Resource End Date out of range for the salesperson related End dates of the resource"

The new resource cannot be modified until the 31-DEC-4712 has been manually removed.

Answer: There are two answers to this problem:

1. When running the concurrent program, use the mass import by organization function since it does not populate the date field.
2. If you cannot delete all the imported records, then nullify the 31-DEC-4712 date in the JTF_RS_RESOURCE_EXTNS table.

6.3.29 Deactivated Role Still Appears

Why does a role that is made inactive still appear as a valid role with no end date on the resource record?

Resolution: Currently the resource role is not affected when a role is made inactive. A future release will address the issue of preventing inactive roles from being specified for resources when adding resources to groups.

6.3.30 What is the Correct Public API Sequence for Creating a Sales Rep?

What is the correct sequence for using pubic published Resource Manager APIs to create a sales rep?

Answer: To create a salesrep, must first create it as a resource using JTF_RS_RESOURCE_PUB API. Then, create a salesrep using JTF_RS_SALESREPS_PUB API.

6.3.31 How do I set the org_context to Properly Call the Create_Salesrep and Update_Salesrep APIs using SQL*Plus

What are the requirements for setting the org context and passing the org_id as a parameter when using SQL*Plus to call the Create_Salesrep and Update_Salesrep APIs?

Answer: Use the following command in your scripts when setting the org_context to call the Create_Salesrep and Update_Salesrep APIs:

```
mo_global.set_org_context(999, NULL);
```

where 999 is the org_id parameter value to which the context is set. This should be done every time you call the Create_Salesrep and Update_Salesrep APIs.

Part III

Notes

This part of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Setting Up Notes
- Customizing HTML Notes Security
- Troubleshooting Notes

7 Implementation Overview

This chapter provides an overview of the Notes module implementation process.

7.1 Overview

A note is free-form text attached to an object that records descriptive information about business transactions and that can be referenced across modules. It can be created by an agent, sales, or service representative, to capture a chronological log of information for business needs. The Notes module provides a common look and feel across applications and can be used as a communication tool to record business information throughout Oracle e-Business Suite.

Notes can be further defined by setting up note types, and note statuses. A note type is used to classify notes or indicate the type of notes, such as a general note type or an interaction note type. In addition to the seeded note types, the implementor or system administrator can create note types to further categorize notes if necessary. Note types can be mapped to a source object to limit the selection in a drop-down list. A note status is used to determine note accessibility, such as a private note with note status Personal. The value of a note status can be set by a profile option during Notes implementation.

In addition, the Notes module provides a flexible security system that the implementor or system administrator can further customize the notes data and then grant appropriate users or user groups with read only or full privilege to access particular notes.

Before implementing Notes, however, it is necessary to understand the functionality of both the Forms-based and HTML versions of Notes.

7.1.1 Forms-based and HTML Versions of Notes

Notes was initially a Forms-based application, and was subsequently expanded to include an HTML version. The functionality of both versions is almost identical. The only difference is that the Forms-based Notes module is not a stand-alone module and it can be accessed only through integrated applications, such as notes created for a service request or task. HTML Notes can be used as a stand-alone module to create personal notes or integrated with other applications, like the Forms-based Notes, to create context sensitive notes.

As Notes can have both HTML and Forms-based functionalities, both versions require the same setup steps and all steps are performed in Forms.

7.2 Steps

This section provides an overview of the required steps for implementing Notes including setting up Notes, customizing HTML Notes security, and troubleshooting Notes. Detailed instructions for these steps are contained in the subsequent Notes chapters.

- Setting Up Notes
  - Setting Up Note Types
  - Mapping Note Types to a Source
  - Defining Notes Reference Mapping
  - Setting Up the Source Object Code and Context
  - Setting Profile Options
- Customizing HTML Notes Security
- Troubleshooting Notes

7.2.1 Setting Up Notes

This chapter contains basic instruction for setting up the Notes components in the following topics:

7.2.1.1 Setting Up Note Types

In addition to the seeded note types, the implementor or system administrator can create new note types to categorize a note, such as a General note type for a general note, or an Interaction note type for a note created specifically for an interaction or activity.

7.2.1.2 Mapping Note Types to a Source

After creating note types, the implementor or system administrator can map these note types to a source object, such as Task Manager, or Sales Lead, or a specific resource category, such as Employee Resource. This limits the visibility of the note type appearing in the Note Type list of values only to the mapped specific source object or resource category.

7.2.1.3 Defining Notes Reference Mapping

In addition to mapping note types to a source, implementors can also map references to a source object. This narrows down the References drop-down list to objects that are actually relevant to a document's source object.

The Mapping Objects window used to define reference mapping is for both Task Manager and Notes modules. Therefore, implementors need to locate the setup screen under the Task and Escalation Manager navigation node.

7.2.1.4 Setting Up the Source Object Code and Context

The implementor or system administrator can add additional data in the JTF objects table if necessary. For example, if a document is newly defined or integrated with Notes, such as Task Manager, then the new document must be associated with Notes usage. As a result, the document name (Task Manager) appears in the Source list when a note is created for task 1150. Each item in the source list has an associated related object (task 1150), which appears in the Related To list.

7.2.1.5 Setting Profile Options

The implementor or system administrator can use the Notes: Default Note Status profile option to set the default value for note status at site, application, responsibility, or user level based on business needs.

7.2.2 Customizing HTML Notes Security

The HTML Notes module contains a security model used to restrict data access to appropriate users through a specific authorization process. This Notes security model, leveraged the Application Object Library (AOL) data security model, provides a flexible mechanism for notes security access. It allows Notes implementor or system administrator to customize notes data, and then grant specific notes to appropriate users or user groups with right access privileges. This includes granting users the ability to view a note, create a note, update a regular note, update a large note, update a note's secondary information (such as note type, status, relation and attachment), and restrict "note type" list of values. This functionality is only enforced in the HTML Notes, not the Forms-based Notes.

7.2.3 Troubleshooting Notes

In addition to the implementation steps, some troubleshooting information is also addressed in a separate chapter. This includes common implementation errors and frequently asked questions (FAQs) for implementing Notes.

8 Setting Up Notes

This chapter covers the following topics:

- Setting Up Note Types
- Mapping Note Types to a Source
- Defining Notes Reference Mapping
- Setting Up the Source Object Code and Context
- Setting Profile Options

8.1 Setting Up Note Types

In addition to using seeded note types, implementor or system administrator can create new note types to categorize notes for specific business needs. For example, if a note is created for a general purpose, then a note type for this note can be “General.” If a note is created specifically for an interaction or activity, then a note type for the interaction note or the activity note can be “Interaction” or “Activity”.

To create a new type, enter the Code name of your application (such as KB_Action for Knowledge Base note with note type called Action), and this code name must be unique and cannot have a duplicate record in the system. In addition, enter note type name (such as Action) in the Meaning field. Select the Enabled check box before using the new note type.

In order to hide an existing note type, implementor or system administrator can assign an end date to that note type.

Perform the following steps in Forms to create new note types.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Notes Setup > Note Type Setup**.

Steps

1. In the Application Object Library: Note Types Lookups window, place your cursor in the code field and select **File > New** to enter new note type.
2. Enter the code, meaning, and description information for the new type.
3. Select the Enable check box to activate the new note type.
4. Chose **File > Save** to save your work.

See Also

- Mapping Note Types to a Source
- Defining Notes Reference Mapping
- Setting Up the Source Object Code and Context
- Setting Profile Options

8.2 Mapping Note Types to a Source

After creating a note type, the implementor or system administrator can map a note type to a source object in order to limit the selection of note type list of values for the mapped source.

What is a Source Object?

A source object is a business object that initiates the creation of a note. If a note is created for a service request or party, then the service request or party is the source object of that note. A note must have a source object.

Be aware of the difference between a source object and related object. A related object is an object related to a note, but is not the source of the note. A note may be created for a task, source object, but it can be related to a party, opportunity, and employee as well. These party, opportunity, and employee resource are related objects for that note. Related objects are not mandatory, instead they are nice to have information for a note.

Mapping Note Types to a Source

Use the Mapping Objects window to map note types to a source. For example, if closure, activity, and interaction note types are mapped to Task Manager, a source object, then when users create a note from a task, they can see these three note types displayed in the list of values. If the same note types are not mapped to another source, Campaign Schedule for Marketing, then they will not see them while attaching a note to a campaign schedule.

In addition, implementors or system administrators can set an end date for a mapped note type if necessary.

> **Note:** This Mapping Note Types to a Source functionality is not enforced in the Forms version.

Perform the following steps in Forms to map a note type to a source object.

Prerequisites

A new note type must exist.

Responsibility

CRM Administrator

Navigation

Navigate to **Notes Setup > Source and Note Type Mapping.**

Steps

1. To search for existing data for a source object, navigate to **View > Query by Example > Enter** and enter your query in the Source Object field.
2. Select **View > Query by Example > Run** to run your query or select **View > Find All** to search for all records.

   The information appears in the Mapping Objects window.
3. Select the Source Object from the list of values (LOV), for example, Task Manager.

4. Select the Note Type you want to map to the drop-down list from the LOV, for example Call Back.
5. (Optionally) Enter an end date or use the calendar LOV to select a date.

   The seeded check box is not editable.
6. Click **Save**. The Call Back note type will now appear in the note type drop-down when you create a note in Task Manager.

See Also

- Setting Up Note Types
- Defining Notes Reference Mapping
- Setting Up the Source Object Code and Context
- Setting Profile Options

8.3 Defining Notes Reference Mapping

Use the Mapping Objects window to map a reference type to a source object. This narrows down the References list of values (LOV) to the mapped object. For example, when creating a note for a Sales Opportunity, users typically don't want to see such objects as Service Request or Defect in the References list of values. Instead, they only want to see Lead, Forecast, Quote, and Sale Organization. Therefore, implementors or system administrators must map note references such as Lead, Forecast, Quote, and Sales Organization, to the source object, Sales Opportunity.

Be aware that the Mapping Objects window is used to define reference mapping for both Task Manager and Notes. To locate the reference mapping screen, select the Task and Escalation Manager, not Notes navigation node.

> **Note:** This window defines reference mapping for both the Task Manager and the Notes module.

Perform the following steps in Forms to map note references.

Prerequisites

Your source object must exist.

Responsibility

CRM Administrator

Navigation

Navigate to **CRM Administrator > Task and Escalation Manager > Setup > Task & Note References.**

Steps

1. In the Mapping Objects window, select your source object from the list of values, for example, Sales Opportunity.
2. Select the References you want to appear in the LOV.
3. Optionally select an end date for the mapped reference.
4. Select the application where you want to extract your additional data from and click **Save**.
5. Repeat these steps for every object that you want to appear in the References LOV for your source object.

See Also

- Setting Up Note Types
- Mapping Note Types to a Source
- Setting Up the Source Object Code and Context
- Setting Profile Options

8.4 Setting Up the Source Object Code and Context

When defining a new document, Notes implementor or system administrators must associate Notes usage to the new document. In the Forms-based Notes, the document name appears in the Source list. Each item in the Source list has an associated related object, which appears in the Related To list.

How to enter each field for different tabs, see the detailed step by step instruction in the Setting Up Metadata Objects section, Setting Up Task Manager chapter of the *Oracle Common Application Components Implementation Guide*.

Perform the following steps in Forms to define the source code usage as NOTES.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Setup > Objects Meta-data**.

Steps

1. In the Tasks Setup: Object Types window opens, perform one of the following tasks:

    a. If the source object code you want to seed already exists, then define the usage as NOTES.

    b. If the source object code is not defined, then you must define the source object code, the name, and select its details and usage. (Usage should be NOTES.)

2. For detailed instruction on how to enter each field, please see Setting Up Metadata Objects.

See Also

- Setting Up Note Types
- Defining Notes Reference Mapping
- Mapping Note Types to a Source
- Setting Profile Options

8.5 Setting Profile Options

The following table describes the profile option used by Notes.

Table 8–1 Notes Profile Options

Name	Default Value	Level	Description	Outcome
Notes: Default Note Status	Public	Site	This profile option sets the default note status. Profile option values include private, public, or publish.	If you select **Publish**, then that is the default value shown in the Status drop-down list when creating a new note. If no profile option is set, default is **Public.**

Note: See Appendix A, Profiles Options, for details on how these profile options can be set.

9

Customizing HTML Notes Security

This chapter covers the following topics:

- HTML Notes Security Overview
- Terms and Definitions
  – Users (User Groups)
  – Objects
  – Object Instances
  – Object Instance Sets
  – Functions (Privileges)
  – Menus (Roles)
  – Grants (Authorizations)
  – Global Grants
- Steps for Customizing HTML Notes Security
  – Identifying Users or User Groups
  – Defining Object Instance Sets
  – Defining Menus
  – Disabling Existing Grants
  – Adding New Grants

9.1 HTML Notes Security Overview

By leveraging the Application Object Library (AOL) data security model, HTML Notes module provides a flexible mechanism for notes security access. This security model provides the ability to restrict data access to appropriate users through a specific authorization process.

For example, in the past, almost all users can create new notes, but now only the users who are granted access to the create note function would be able to create notes. The same theory can be applied to the creation or deletion of attachments, or note modifications.

With the new security model, based on the AOL security model, HTML Notes module uses the concepts of objects, instances, and instance sets to further group all data in HTML Notes into different units or sets. The biggest unit is Notes that is considered as an object in AOL term. Within the object Notes, multiple notes can be grouped into different subsets (or object instance sets), such as all notes with status "private", all notes of type "offer", or all notes not of type "offer". Based on the definition of these subsets, a private note, or a note of type "offer" then becomes the smallest unit of the Notes object and is called the object instance.

With these data object concepts, information entered in HTML Notes can be further restricted to the data level, customized for your business needs, and then securely granted to resources and resource groups.

As HTML Notes security is based on the AOL security model, therefore, relevant AOL data security concept and terminology will be introduced first. How to customize the notes security is addressed later.

Note: Even you define the data security rules in the HTML Notes, these rules will not be enforced in the Forms-based Notes module.

Information on AOL data security framework, refer to *Oracle Applications System Administrator's Guide*.

9.2 Terms and Definitions

This section explains the various terms used in the HTML Notes security:

- Users (User Groups)
- Objects

- Object Instances
- Object Instance Sets
- Functions (Privileges)
- Menus (Roles)
- Grants (Authorizations)
- Global Grants

Users (User Groups)

A user is a single person with an account on the system (represented by a row entry in FND_USER). Users can be grouped into groups. Therefore, a user role may represent a user or group of users. A user group is any grouping of FND_USERS who are exposed through the WF_ROLES view.

Users and user groups can be referred as **Grantee** if they are the subjects of a data security grant. These users and user groups must be exposed in the WF_USER/WF_ROLES.

Objects

An object is a type of thing on which security can be managed. Notes is an example of an object.

In a technical definition, each object must be registered in the FND_OBJECTS tables. Every object definition will contain related database object (table or view) and primary key information for the object.

There are two seeded objects used in Notes security:

- JTF_NOTES
- JTF_NOTE_TYPES

Object Instances

An object instance is a specific entity of an object. This generally corresponds to a row (or related set of rows) in the database. If Notes is considered an object, then the Note with number 1541 is an object instance.

In a technical explanation, object instances are derived from the primary key values. The primary key values should be set for the registered object in the FND_OBJECTS and FND_GRANTS.

Object Instance Sets

An object instance set is a group of multiple object instances. For example, all notes with a number smaller than 5 could be considered as an object instance set.

In a technical definition, object instance set definition is stored in the FND_OBJECT_INSTANCE_SET table. The definition contains a SQL where clause, the predicate, that combined with the object definition will return all the object instances that are part of the object instance set.

Use the following examples to understand the concept of object instance sets. Please note that all words after where clause in Italic style are defined in the FND_OBJECT_INSTANCE_SET table. In addition, to avoid processing issues all the columns used in the where clause should be prefixed with "&TABLE_ALIAS" in the object instance set definition.

- All notes with a number smaller than 5:

```
SELECT jtf_note_id
FROM jtf_notes_b
WHERE &TABLE_ALIAS.jtf_note_id < 5
```

- All non private notes:

```
SELECT jtf_note_id
FROM jtf_notes_b
WHERE &TABLE_ALIAS.note_status <> 'P'
```

- All notes that are not confidential

```
SELECT jtf_note_id
FROM jtf_notes_b
WHERE &TABLE_ALIAS.note_type <> 'CONFIDENTIAL'
```

- All notes that are confidential

```
SELECT jtf_note_id
FROM jtf_notes_b
WHERE &TABLE_ALIAS.note_type = 'CONFIDENTIAL'
```

All columns exposed through the FND_OBJECTS.DATABASE_OBJECT_NAME table/view can be used to create instance sets, although basic performance rule should be taken into account.

Functions (Privileges)

A function is an action that can be performed on an object or object instance. It is the smallest unit of secured product functionality. It can be granted to a user or user group which means gives them permission to perform that function. Therefore, it can also be referred as a permission or privilege from a user’s point of view.

For example, a note can be created; CREATE_NOTE could be considered a function. A note can be updated; UPDATE_NOTE again could be considered a function. Functions can be secured through the AOL security model. Notes has the following functions defined for the Notes object:

- JTF_NOTE_SELECT, the ability to view a note
- JTF_NOTE_TYPE_SELECT, the ability to view a note type
- JTF_NOTE_CREATE, the ability to create a note including a regular note, large note (detailed note) and an attachment for a note
- JTF_NOTE_UPDATE_NOTES, the ability to update a note's text (regular note)
- JTF_NOTE_UPDATE_NOTE_DETAILS, the ability to update a note's details (a large or detailed note)
- JTF_NOTE_UPDATE_SECONDARY, the ability to update a note's type, status, relation (relate to), and attachment information

These functions are defined in the FND_FORM_FUNCTIONS table since they are referenced in the actual code. Therefore, they cannot be changed or extended.

In addition, functions (privileges) can be grouped into menus (roles) to reduce the granting overhead.

Menus (Roles)

A menu is a grouping of functions. It is required to group functions into related sets of menus necessary to perform a particular job role on an object instance. A good example is an "Administrator" menu, which might include many functions required for a user with an administrator role to perform his job. Therefore, menus can also be referred as roles.

In addition, menus can have multiple hierarchies and this menu structure is built upon logical groups of functions.

The following menus (roles) are defined for Notes security:

- JTF_NOTES_USER
  - JTF_NOTE_SELECT

- JTF_NOTE_UPDATE_SECONDARY
- JTF_NOTES_CREATOR
  - JTF_NOTE_CREATE

Please note that menus are user definable, the seeded menus only exist to ensure backward compatibility.

Grants (Authorization)

A grant is an authorization for the grantee (users or user groups) to perform the specified object role on the specified object instance or object instance set. Therefore, grants are what tie the whole thing together. A grant consists of the following three components:

- Object. Any object instance or object instance set, for instance, all non-private notes.
- Grantee. Any user or user group, for instance, "JDOE" for John Doe
- Menu. Any menu, for instance, "JTF_NOTES_USER"

These three components would grant the user, John Doe, the ability to select and update all non-private notes.

In addition, all grants should be registered in table FND_GRANTS.

Please note that when using AOL security a user will by default not be able to do anything unless explicitly granted.

Global Grants

To reduce the administration of grants, authorizations can be granted globally to the following:

- The "Global" user or user group (grantee)
- The "Global" object instance (object)

9.3 Steps for Customizing HTML Notes Security

After understanding of how data can be organized in HTML Notes based on the AOL security model, system administrator can further customize the HTML Notes security rules by granting users with appropriate data access permissions using the concept of object instance sets.

To better explain how the customization can be done, use the following business scenario to lead you through the possible customization steps.

Business Scenario

A company's Sales department wants sales managers to be able to create confidential notes for their sales leads. These confidential notes will be of note type "Confidential" and should be invisible to normal sales representatives. In addition, only sales managers should be able to create confidential notes.

To customize HTML Notes security which is, in other words, to create grants based on the business scenario. Before starting a new grant, the following three components should be identified first:

- Identifying Users or User Groups (Grantee)
- Defining Object Instance Sets (Object)
- Defining Menus (Menu)

Once the grant components (who has what privileges to access which objects) are identified, the administrator can start the granting process:

- Disabling Existing Grants
- Adding New Grants

9.3.1 Identifying Users or User Groups

Users need to be identified so that appropriate access privileges can be granted to them. In general, a user can be a single resource, resource group, or all members of a resource group.

Based on the scenario, sales mangers and sales representatives are the grantees who will be given appropriate access permissions should be first identified. It can be done in the Resource Manager by creating a resource group "SalesReps" containing all the sales representatives, and another group "SalesMan" containing all sales managers. How to create a resource group, refer to Resource Manager of the *Oracle Common Application Components Implementation Guide.*

See Also

- Defining Object Instance Sets
- Defining Menus
- Disabling Existing Grants

- Adding New Grants

9.3.2 Defining Object Instance Sets

Use an object instance set to specify a parameterized set of rows for the Notes object so that it can be granted to appropriate users.

An object instance set is a subset of data resided within an object, therefore an object must exist first before you are able to create an object instance set for that object.

> **Note:** The creation of object instance set is meta data driven, all data required to ensure backward compatibility with current note security model are seeded.

The Notes module uses two seeded objects, JTF_NOTES and JTF_NOTE_TYPES. Each object can be customized by creating object instance sets to provide users with specific sets of Notes data if necessary. For example, notes (JTF_NOTES object) can be customized to have different object instance sets, such as all confidential notes. Note types (JTF_NOTE_TYPES object) list of values (LOV) can also be customized for different users.

Based on our scenario, in order to grant sales managers the permission to create confidential notes, and make sure sales representatives cannot create confidential notes, the following object instance sets should be created for JTF_NOTES:

- All confidential notes
- All non-confidential notes

Additional object instance sets should be created for JTF_NOTE_TYPES so that sales manager, not sales representatives, can see the confidential note type. To do so, you can filter the list of available note types:

- All confidential note types
- Sales representative note types (all note types except the confidential note type)

> **Note:** The note type LOV uses the internal API and appends the returned where clause to the base query to provide security data access.

Use the following steps to define object instance sets:

Prerequisites

An object must be in place.

Responsibility

FND Security Administration (Self Service Application)

Navigation

Objects

Steps

Tips: First locate the object that you want a new instance set created for, then enter necessary information for the set.

Detailed information on how to define object instance sets, see *Oracle Applications System Administrator's Guide*.

1. Enter necessary search information in the Find Objects window to locate the JTF_NOTES and JTF_NOTE_TYPES objects. Search results should be listed after executing the search.
2. Click the object name hyperlink for which you want the new instance set to be created from the search result to open the Find Object Instance Set window.
3. Existing instance sets for the selected object are also listed here. Click **Create New Instance**.
4. Enter instance set detail information including instance set name, display name, description and predicate.
5. Save your work.

See Also

- Identifying Users or User Groups
- Defining Menus
- Disabling Existing Grants
- Adding New Grants

9.3.3 Defining Menus

A menu is a hierarchical arrangement of functions and menus of functions. If a grant just involves a single function, such as grant the create notes function (JTF_

NOTE_CREATE) to a user, then there is no need to define menus. As mentioned earlier, the purpose of using menus is to reduce the administrative tasks. If multiple functions need to be given to a user, it is necessary to group them into a menu or menu structure.

In our scenario, sales mangers require the following functions in a menu format:

- JTF_NOTE_SELECT
- JTF_NOTE_CREATE
- JTF_NOTE_UPDATE_NOTES
- JTF_NOTE_UPDATE_SECONDARY
- JTF_NOTE_TYPE_SELECT

In addition, create another menu for sales representatives including the following functions:

- JTF_NOTE_SELECT
- JTF_NOTE_CREATE
- JTF_NOTE_UPDATE_SECONDARY
- JTF_NOTE_TYPE_SELECT

Prerequisites

None

Responsibility

System Administrator

Navigation

Application > Menu

Steps

1. Enter the menu name that describes the purpose of your menu, such as "SalesMan" or "Salesrep" in the Menu and User Menu Name fields.

   The User Menu Name is used when a responsibility calls a menu or when one menu calls another.

2. Select an appropriate menu type and enter description information:

   - Standard. For menus that would be used in the Navigator form

- Tab. For menus used in self service applications tabs
- Security. For menus that are used to aggregate functions for data security or specific function security purposes, but would not be used in the Navigator form

3. Enter required functions for this menu including:
   - Sequence. Enter an integer here.
   - Navigation prompt. Enter a user-friendly, intuitive prompt your menu displays for this menu entry. This menu prompt appears in the hierarchy list of the Navigator window.
   - Submenu name. Enter a submenu name if applies. This calls another menu and allows users to select menu entries from that menu.
   - Function name and description. Enter a function name that you wish to include in the menu. Descriptions appear in a field at the top of the Navigate window when a menu entry is highlighted.
   - Grant check box. This should always be checked which indicates that this function is automatically enabled for the user. If this is not checked, then the function must be enabled using additional data security rules.
4. Click **View Tree...** to see menu's hierarchical structure.

Refer to *Oracle Applications System Administrator's Guide* for more information regarding how to define a menu.

See Also

- Identifying Users or User Groups
- Defining Object Instance Sets
- Disabling Existing Grants
- Adding New Grants

9.3.4 Disabling Existing Grants

The purpose of disabling existing grants is to make sure that all seeded global grants are revoked so that they don't interfere with the new grants. To disable a grant, you can set an end date for the grant, instead of deleting it completely.

Prerequisites

None

Responsibility

FND Security Administration (Self Service Application)

Navigation

Grants

Steps

1. Search the existing grants that you want to disable by entering search criteria in the Search Grants window.
2. Click **Go** to retrieve the grants that match your search criteria.
3. Select the grant that you want to disable from the search result.
4. Set an end date in the Context window and click **Finish** to disable the grant.

More information on how to disable existing grants, see *Oracle Applications System Administrator's Guide.*

See Also

- Identifying Users or User Groups
- Defining Object Instance Sets
- Defining Menus
- Adding New Grants

9.3.5 Adding New Grants

A new grant must take place when there is a need to authorize access privileges for a user so that the user can perform certain functions, or to have more specific actions on a designated instance set. Therefore, based on the data access levels, there are two types of grants: Function Grants (such as "Administrator" menu) and Data Grants (such as the note type LOV data)

For function grant, it applies to all objects and consists of the following windows:

1. Grantee: There are three grantee types appeared in radio buttons. Only one of them should be selected as a grantee.

- All users (global)
- Group of users (group)
- Single user (user)

  In the case of a group or a single user is selected, the corresponding group or user name should be further identified. The selected grantee will be validated against WF_ROLES table.

2. Function Set: A function set (or a menu) can be selected from the LOV so that an appropriate function set can be granted to a specified grantee.
3. Context: The screen provides grant attributes information including organization, responsibility, start and end dates, program name, and program tag fields. This is the place where a grant can be disabled by entering an end date.

For data grant, a specific object and instance set information need to be further identified. It consists of the following windows in a sequential order:

1. Object: A specific object name needs to be specified for this grant.
2. Grantee: Like the function grant, grantee can be a user, a group, or all users.
3. Function Set: Like the function grant, a function set needs to be specified in order to authorize it to a specified grantee.
4. Data Set: There are three types of instance. Only one of them should be selected:
   - All rows of the object (global): When it is selected, the Data Set Details window will be skipped and you are directed to the Context window.
   - A specific row of the object (instance)
   - A parameterized set of rows (instance set): When it is selected, the instance set name needs to be further identified.
5. Data Set Details: In the case of instance or instance set is selected in the Data Set window, more data or data set details will be displayed in this window. If instance is selected, then this page will have associated primary key values displayed. If instance set is selected, then this page will have parameter columns displayed with the associated predicate information for the selected instance set.
6. Context: Like the function grant, additional grant attributes can be addressed here. Use the end date field to revoke a grant.

Based on the scenario we have, the following grants need to be authorized:

- Grant all sales representatives the access to all non-confidential notes
- Grant all sales mangers the access to all non-confidential notes
- Grant all sales mangers the access to all confidential notes
- Grant all sales representatives the access to sales representative note types
- Grant all sales managers the access to all confidential note types
- Grant all sales managers the access to sales representative note types

Use the following steps to add a new grant. Detailed information on how to add new grants, see *Oracle Applications System Administrator's Guide.*

Prerequisites

None

Responsibility

FND Security Administration (Self Service Application)

Navigation

Grants

Steps

1. Select **Create Data Grant** to add new grants to sales managers or sales representatives.
2. In the Object window, select JTF_NOTES as the object name.
3. In the Grantee window, select the Group of Users radio button. Additionally, specify appropriate group name.
4. In the Function Set window, specify a menu name for either sales managers or sales representatives.
5. In the Data Set window, select the A parameterized set of rows (Data Set) radio button. Furthermore, specify the object instance set that you have defined earlier.
6. In the Data Set Details window, enter appropriate primary key values.
7. In the Context window, enter appropriate organization, responsibility and start date information. Leave the End Data field blank.
8. Enter JTF_NOTES in the Program Name field.

9. Enter JTF_SALES_NOTES or JTF_SALES_NOTETYPES in the Program Tag field depending on the selected object instance set.
10. Click **Finish**. Once this process is successfully completed, the confirmation page opens with the message saying that the grant has been created.

See Also

- Identifying Users or User Groups
- Defining Object Instance Sets
- Defining Menus
- Disabling Existing Grants

10 Troubleshooting Notes

This chapter covers the following topics:

- Error Messages
- Answers to Frequently Asked Questions (FAQs)

10.1 Errors Messages

10.1.1 ORA-20000

InterMedia Text error: ORA-01722: invalid number ORA-06512: at "CTXSYS.DRUE", line 126 ORA-06512: at "CTXSYS.TEXTINDEXMETHODS", line 226 ORA-06512: at line 1.

Cause: Script Failure Error

Action: To resolve this issue, configure your environment to include Intermedia text. For more information, refer to the *Oracle 8i Intermedia Text Installation Manuals FAQ* or contact Oracle Support.

10.1.2 Script Failed Error

The following error message can occur:

> **ORA-29856: error occurred in the execution of ODCIINDEXDROP routine.**
>
> **ORA-20000: interMedia Text error: ORA-01722: invalid number ORA-06512: at "CTXSYS.DRUE", line 126 ORA-06512: at "CTXSYS.TEXTINDEXMETHODS", line 226 ORA-06512: at line 1.**

Configure your environment to include Intermedia text. For more information, refer to the *Oracle 8i Intermedia Text Installation Manuals FAQ* or contact Oracle Support.

See Also

- Setting Up Note Types
- Mapping Note Types to a Source
- Setting Up the Source Object Code and Context
- Setting Profile Options

10.2 Answers to Frequently Asked Questions (FAQs)

The following are frequently asked questions. Answers to these questions may help you in troubleshooting problems with the Notes module.

10.2.1 Can You Delete or End Date Seeded Note Types?

Seeded data cannot be end dated or deleted. However, users can define new note types.

Part IV

Spreadtable

This chapter of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Implementation Tasks

11 Implementation Overview

This chapter provides an overview of the Spreadtable implementation process.

11.1 Overview

A spreadtable is a metadata driven user interface component that contains rows, columns, and column headers set in a grid that can display dynamic content at run time. Spreadtable can be embedded into an Oracle form. Oracle Common Application Components use Spreadtable to provide flexibility in displaying and handling data through an interactive way. It allows users to sort, search, copy and export data, and customize the display through the features of resize, resequence, and hide and show columns.

Before implementing Spreadtable, it is necessary to understand the functionality of the Spreadtable including sorting, searching, customizing layout, and copying and exporting.

- Sorting
- Searching
- Copying and Exporting
- Customizing Layout

11.1.1 Sorting

Spreadtable provide users to sort data in the following two ways:

1. Click the grey dot in a column header in order to sort a category.

   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. 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.

11.1.2 Searching

Spreadtables allows users to search for specific information in the spreadtable. To perform a search, right-click on a cell in the spreadtable and select **Find** from the pop-up menu that appears.

Find a matching value by typing the desired sequence of characters into an appropriate text field. Indicate whether or not to match case, and select the direction of the search, backward or forward.

11.1.3 Copying and Exporting

In addition to sorting and searching, users can use the spreadtable to copy necessary information and then export the data into a spreadsheet application, such as Microsoft Excel.

Users can copy a cell, selected rows, or all rows in the spreadtable to a clipboard by right-clicking in the cell and then selecting the appropriate option from the menu.

When users 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.

11.1.4 Customizing the Layout

Spreadtables allow users to adjust the table layout in order to accommodate different business needs in the following ways:

- Make changes to the column width, sequence, visibility, and sort order.
- Resize the columns or rows to display text as you wish.

- Resize the window depending on the application you use. The spreadtable display will adjust accordingly.
- Resequence the columns by clicking the header that you want to be resequenced and holding mouse until a black box appears. Move the header to the selected position.
- Hide columns to make irrelevant or confidential information invisible. This can be done by right-clicking the header of the column you wish to hide and then selecting Hide Column from the pop-up menu. Hidden information does not migrate when data is copied to the clipboard.
- Show columns by using the Show Column option. This option lists a submenu that has currently hidden columns. Select all or only those you wish to display.
- Preserve or restore the changes you make to the table layout. This can be done by right-clicking a column header and clicking **Customizations**. Click **Save** from its submenu to save the changes. Click **Clear** to restore default settings.

11.2 Steps

This section provides an overview of the required steps for implementing Spreadtable including creating a new spreadtable and setting profile options. Detailed instructions for these steps are contained in the subsequent chapters.

- Creating a New Spreadtable
- Setting Profile Options

11.2.1 Creating a New Spreadtable

The implementor or system administrator can create a new spreadtable by defining a new datasource (a set of metadata) that can plug into an Oracle Forms bean area container. Metadata is information that defines what data is retrieved at run time and how that information is presented. After entering required data in a newly defined spreadtable, the implementor can test the functions of this new spreadtable before actually use it.

11.2.2 Setting Profile Options

After defining a new spreadtable, the implementor or system administrator must set up necessary profile options in order to specify whether or not images are visible in the spreadtable. These include displaying images in grid column headers, header popup, row header images in the grid, grid popup, checkbox images, custom images, and long wait images.

12

Implementation Tasks for Spreadtable

This section covers the following topics:

- Creating a New Spreadtable
- Setting Profile Options

12.1 Creating a New Spreadtable

Use the Spreadtable Meta Data Administration window to design spreadtables that plug into an Oracle Forms bean area container.

- A spreadtable is the user interface component that contains rows, columns, and column headers set in a grid that can be embedded into an Oracle form.
- Oracle Forms-based Common Application Components use the spreadtable to display and format dynamically retrieved data at run time. This is accomplished by predefined metadata definitions.
- Metadata is information that defines what data is retrieved at run time and how that information is presented.

The following table describes the Spreadtable Meta Data Administration tabs.

Table 12–1 Spreadtable Meta Data Administration Tab Descriptions

Tab	Description
Database	Use the Database tab to set column type and order, datatype, sequence, and default sort order.
Display	Use the Display tab to set column label, visibility, display sequence, and display width.
Alignment and Formatting	Use the Alignment and Formatting tab to set type of header and cell alignment, as well as display type and format.
Custom Format Masks and Mappings	Use the Custom Format Masks and Mappings tab to set how data shows. This applies to columns with datatype of number, check box, and images. For example, a spreadtable can display data values as a percent.
Query	The Query tab is for internal use only. It is used exclusively by the Universal Work Queue.
Sort Order	Use the Sort Order tab to set the overall sort order of the columns for the spreadtable. For example, you may set the primary sort order to be alphabetical based on column A, and set a secondary sort order to be numerical based on column B if B is defined as number in the database.
Test	Use the Test tab to test the newly defined spreadtable.

WARNING: Oracle does not support custom development of new forms using the spreadtable interface.

- **Do not delete currently existing columns when modifying an existing spreadtable. Instead, use the Freeze Visible State property in the Display tab to make the column invisible to the user.**
- **Do not delete any existing metadata definitions.**
- **If you modify existing metadata definitions, these changes may be overwritten by subsequent patches.**

Perform the following steps to create a new spreadtable.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Spreadtable Administration window.

Steps

1. In the Spreadtable Meta Data Administration window, define a new datasource (a set of metadata) by entering the following:
   - **Datasource Name**: The unique name that identifies a set a metadata. It must always be <Application Prefix>_<Name>.
   - **Application**: The name of your product.
   - **Title**: A descriptive name for this set of metadata.
   - **Relational View Name**: Select, from the LOV, the name of the view from which information is to be retrieved to populate the spreadtable.
   - **Lines/Rows**: Enter how many lines of text are to display per row.
   - **WHERE Clause:** (Optional) Enter a SQL statement here if desired. Use this field to enter filtering criteria. Note the following:
     - Do **not** start the SQL statement with the keyword WHERE, as this is automatically prepended to the statement.
     - **Always** use bind variables if the value changes at runtime.
   - **Fetch Size:** Enter how many rows to be fetched each time. The default is set to 200 rows if it is not specified.
2. Select the Database tab, if it is not already selected, and enter the following information for each column that you want to be visible in the spreadtable:
   - **Column Alias**: The column alias becomes part of the primary key, therefore it must be a unique name.

- **View Column/ Function**: Select from the LOV the desired name of the View Column.
- **Datatype**: Select from the LOV either character, number, or date.
- **Query Sequence**: The sequence value determines the order in which columns are extracted from the database. You could start with 1, but in actual practice, it is a good idea to leave gaps in the sequence for ease of row insertion later. To improve performance, begin with the columns that you will refer to in your code, typically the primary key columns to execute a query in a detail block.
- **Fire Post Query Flag:** Select this flag to fire the post query event when the row is displayed or used.
- **Sortable**: Select this check box allows the user to sort on this column.
- **Sort Column**: Select from the LOV the desired column name that you want to use for sorting. If this field is specified, then a user can sort on criteria (the specified column name as sorting criteria) other than the actual data. If it is not specified, then the View Column is used to sort data. For example, if Priority is selected in this field and it is associated with a code ('High' - 1, 'Medium' - 2, 'Low' - 3), then the priority code can be used to sort the Priority column values.
- **Default Sort Order**: Sort in ascending or descending default order.

3. Select the Display tab, and enter the following for each column that you defined previously:
   - **Column Alias**: The column alias field is filled automatically.
   - **Label:** This field is supplied automatically to identify the column header information once the Column Alias field is identified. You can change the label information if desired.
   - **Visible**: Select to make this column visible in the spreadtable.
   - **Freeze Visible Property**: Select if you want the end user to be able to change the visible properties (show/hide) at run time for this column.
   - **Display Sequence**: The value determines the order in which the columns show in the spreadtable.
   - **Display Width**: Set the width (in pixels) of the displayed column.
4. Select the Alignment and Formatting tab, and enter the following:
   - **Header Alignment**: Select, from the LOV, either Center, End, Right, or Start.

- **Cell Alignment**: Select, from the LOV, either Center, End, Right, or Start.
- **Display Type**: Select, from the LOV, either Check Box, Hyperlink, Text, or Image.
- **Display Format:** (Optional) Select, from the LOV, either Currency, Date, or Date Time.

5. Select the Custom Format Masks and Mappings tab.
   - **Column Alias**: The column alias field is filled automatically.
   - **Check box Mappings**: These options apply only if the display type field in the Alignments and Formatting tab is set to Check Box.
     * **Checked**: Select this check box to represent a column value as a selected check box, not its corresponding image.
     * **Unchecked**: Select this check box to represent a column value as an unselected check box, not its corresponding image.
     * **Other**: Select this check box to represent a column value as neither checked nor unchecked.
   - **Format Mask**: Use this column to set how columns with a datatype of Number display data. For example, a spreadtable can display data values as a percent.However, you should set this only in rare cases.
   - **Image Description Column:** Uses this column as a tool tip for an image. For every column defined as image, if the Image Description Column is not Null (left blank), then both the View Column and the Image Description Column are retrieved. If it is left blank, then only the View Column is retrieved. Users can position mouse over an image to see the image description information if it is specified.
   - **Currency Column**: Uses this column to point to the database View Column where the currency code for the current column is stored. This applies only if the display format is set to Currency.
6. Select the Sort Order tab, and perform the following:
   - Choose the Primary Sort key from the LOVs.
   - You can optionally select a second or third Sort key from the LOV.
7. Click the Save icon on the toolbar. (The icon looks like a floppy disk.)
8. Select the Test tab, and click **Test**. Your table appears. You can customize your spreadtable display or copy and export data if necessary.

12.2 Setting Profile Options

Images are used in the spreadtable to improve usability. These include displaying images in grid column headers, header popup, row header images in the grid, grid popup, checkbox images, custom images, and long wait images.

While these images improve the visual effectiveness of the spreadtable they do not, in reality, contribute to its functionality and hence, can be removed if needed.

Use the following profile options to control whether or not any of these images are visible:

- JTA_GRID_DISPLAY_IMAGES (JTA Display images in the grid)

  This profile option is a global setting, which can be overridden by setting the following profile options.
- JTA_GRID_DISPLAY_CHEADER_IMAGES (JTA Display images in grid column headers)
- JTA_GRID_DISPLAY_HEADER_POPUP_IMAGES (JTA Display header popup images)
- JTA_GRID_DISPLAY_RHEADER_IMAGES (JTA Display row header images in the grid)
- JTA_GRID_DISPLAY_GRID_POPUP _IMAGES (JTA Display grid popup images)
- JTA_GRID_DISPLAY_CHECKBOX_IMAGES (JTA Display checkbox images)
- JTA_GRID_DISPLAY_CUSTOM_IMAGES (JTA Display custom images)
- JTA_GRID_DISPLAY_LONGWAIT_IMAGES (JTA Display long wait images)

Note: The browser must be restarted for changes to these settings to take effect.

Table 12–2 Spreadtable Profile Options

Name	Default Value	Level	Description	Outcome
JTA Display images in the grid	Null	User	This profile options sets whether or not images are visible in the spreadtable. (This is a global setting, which can be overridden by setting the following profile options.) Possible values are Null, Yes, or No.	If **Null** (left blank), the value is treated as **Yes**. If set to **Yes**, all images are visible. This is a global setting for all spreadtable images. If set to **No** all images are turned off.
JTA Display images in grid column headers	Null	User	This profile options sets whether or not column header images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all column header images are visible. If set to **No** all column header images are turned off.
JTA Display header popup images	Null	User	This profile options sets whether or not header popup images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all header popup images are visible. If set to **No**, all header popup images are turned off.
JTA Display row header images in the grid	Null	User	This profile options sets whether or not row header images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all row header images are visible. If set to **No**, all row header images are turned off.
JTA Display grid popup images	Null	User	This profile options sets whether or not grid popup images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all header popup images are visible. If set to **No**, all header popup images are turned off.

Table 12–2 Spreadtable Profile Options

Name	Default Value	Level	Description	Outcome
JTA Display checkbox images	Null	User	This profile options sets whether or not images in cells defined as check boxes are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all check box images are visible. If set to **No**, an asterick (*) is used for True and Null (blank) for False
JTA Display custom images	Null	User	This profile options sets whether or not custom images in cells defined as "Image" are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all cell images are visible. If set to **No**, the image description is used in place of the image.
JTA Display long wait images	Null	User	This profile options sets whether or not long wait images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all long wait images are visible. If set to **No**, no long wait images are visible.

Note: See Appendix A, Profiles Options, for details on how these profile options can be set.

Part V

Assignment Manager

This part of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Implementation Tasks
- Troubleshooting Assignment Manager

13
Implementation Overview

This chapter provides an overview of the Assignment Manager implementation process.

13.1 Overview

Assignment Manager is a tool used to select qualified resources and to designate them to a document or a task. It is also used to assign ownership to a document or a task. Assignment Manager is accessed from other modules and applications, and does not function as a stand-alone module. It supports all resource categories defined in Resource Manager.

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.

13.2 Steps

This section provides an overview of the required steps for implementing Assignment Manager. Detailed instructions for these steps are contained in the chapter that follows.

13.2.1 Verifying the TCF Server is Correctly Installed and Running

The implementor or system administrator verifies that the TCF (Thin Client Framework) server is installed and functions properly. The Thin Client Framework Server connects to Scheduler and aids the Gantt chart to display and render information.

13.2.2 Setting Profile Options

After verifying that the TCF server installed and running properly, the implementor or system administrator must set the required profile options for Assignment Manager. Profile options enable Assignment Manager to retrieve preferred resource information including scheduling options.

13.2.3 Verifying Additional Setup Dependencies

Assignment Manager does not operate as a standalone application but is integrated with other components from the e-Business suite and from ERP (Enterprise Resource Planning). As a result, the implementor or system administrator must verify that all of the following components are installed and configured properly to operate with Assignment Manager:

- Territory Manager
- Forms-based Calendar
- Service Request
- Oracle Contracts
- Installed Base

13.2.4 Configuring Color Coded Tasks

Assignment Manager uses different colors to identify scheduled functions such as shifts, assigned tasks, escalations, and available time slots when a planned time period is indicated by the calling application. In addition to providing a default set of colors that denote available times slots for specific functions, Assignment Manager also enables implementor and administrators to configure their own color coded functions. This feature simplifies the operation of applications that require intensive manual tasks to assign resources. For example, a support representative using a support or service application can easily determine the availability of qualified technicians to answer a support call if their shifts, tasks, and availability are denoted by color.

13.2.5 Customizing the Assignment Manager UI

Assignment Manager is used by different applications each of which generally requires a limited subset of its total available fields and options. For this reason, when implementing Assignment Manager, the implementor or system administrator can customize its UI based on their application requirements. The

Assignment Manager UI can be customized to meet the individual requirements of the following applications:

- Tasks
- Service Requests
- Service Request Tasks
- Escalations

Note: If patch FND.D or higher is installed, do **not** perform the TCF verification steps listed above. They are not necessary. Instead, consult **Note: 164766.1**, available on MetaLink.

13.2.6 Setting Up Enhanced Planning Options

Assignment Manager enables you to configure time planning options that use the SYSDATE and TIME functions to indicate the start of a shift instead of defaulting to the task's start date. This is useful in situations where the task's start date precedes the date and time in which the shift is assigned and consequently predates the resource's shift assignment. Enhanced planning options are configured using the JTFAM:Use systime for Assignments profile option which is set to Yes or No at the site level. When set to Yes, the profile option enables the SYSDATE and TIME functions to determine the start of a shift. When set to No, the profile enables the task start date and time to represent the start of a shift.

14

Implementation Tasks for Assignment Manager

This chapter covers the following topics:

- Setting Up the TCF Servers for Gantt
- Setting Profile Options
- Setting Up Other Dependencies
- Configuring Color Coded Tasks
- Customizing the Assignment Manager UI
- Setting Up Enhanced Planning Options

14.1 Setting Up the TCF Servers for Gantt

Assignment Manager uses Gantt to display tasks that are assigned, available, or escalated and for scheduling. The Thin Client Framework (TCF) server must be running and correctly configured for Gantt to display information and render it properly.

> **Note:** Setting up the TCF servers is only required if you are using the Gantt chart in the Intelligent and the Window to Promise options or using the Field Service product.

14.1.1 What is a Gantt Chart?

A Gantt chart displays tasks or other time bound entities in relation to their associated resources and is typically used for scheduling purposes. A manager can use a Gantt chart to view a team's current workload. Based on this information, the manger can make real-time decisions about task assignments, or can adjust and reassign tasks. A Gantt chart can only display and render information properly if the TCF server is running and is correctly configured.

Gantt charts are used by the following CRM modules:

- Field Service (Dispatch Center)
- Assignment Manager

14.1.2 What is the TCF Server?

The Thin Client Framework (TCF) server is a middle tier process that enables some Oracle Applications user interface Java components to communicate with the middle tier and database tier. The following CRM user interface Java components use the TCF server to communicate the middle tier and database tier:

- Field Service Scheduler
- JTF Gantt Chart
- JTF Assignment Manager

The TCF server process should always be running in a production installation.

The Socket Server Class

The TCF server uses the Socket Server class (in the oracle.apps.fnd.tcf package) to handle incoming connections. Administration of the TCF server is typically handled through the ServerControl class (in the same package), which basically provides a clean interface around all the different TCF server functions that an administrator might perform (for example, starting, stopping, updating, and other similar tasks). Oracle recommends using the ServerControl class for most purposes.

> **Note:** The order and list of parameters for the ServerControl class, and the SocketServer class are not the same. Refer to the *Administering the TCF Server (11i)* documentation for a complete list. You can access this document on Metalink (Note 123689.1).

Proxy Objects and Dispatchers

TCF is comprised of the following:

- A pair of Dispatcher classes which own the network connection

- An interface called Proxy which enables an object to use the TCF network connection
- An Item class which serializes data for transmission

Generally, the client application or applet creates a number of Proxy objects at the same time, and then requests the Dispatchers to connect these objects to peer objects on the middle tier. During this process the following occur:

- Proxies are implemented in pairs, one for the client, and one for the middle tier.
- The Dispatchers maintain a list of connected proxy pairs and handle the routing of messages.
- Proxies communicate by writing messages to a buffer maintained by a Dispatcher, and then instructing the Dispatcher to send these messages.
- Several proxies can share a round trip by waiting to call "send" until after each has had an opportunity to write its messages.
- The Dispatchers deliver these messages by invoking the read Item method of Proxy.

14.1.3 Configuring the TCF Servers

Note: If patch FND.D or higher is installed, do **not** perform the TCF configuration steps listed. They are not necessary. Instead, consult **Note: 164766.1**, available on MetaLink.

WARNING: These instructions for implementing the TCF servers are NOT valid if the AOL TCF Server patch (bug # 1699404) has been installed.

This patch is owned by the Oracle Applications Object Library (AOL). Contact AOL support for issues with this patch.

Configuring the TCF servers is a complex process with specific prerequisites. The following table lists the required steps and sequence for configuring the TCF server.

Table 14–1 TCF Configuration Steps

Step	Description
1	Apply any necessary patches.
2	Perform the necessary post-install steps.
3	Configure the servers.
4	Verify the server configuration.
5	Troubleshoot any subsequent problems

14.1.3.1 Step 1: Installing any Required Patches

Begin configuring the TCF server by installing any patches required for the correct performance of your system.

Patch 135908

You must apply patch 135908 if you have set up the Oracle Applications to use HTTP protocol for communicating between a client browser and Oracle Forms and TCF servers.

135908 HTTP mode fails with: "java.io.IOException: Invalid HTTP Packet received" when using TCF APIs.

Patch 1473057

You must apply patch 1473067 if you created the database using a non-US7ASCII and non-WE8ISO8859P1 character set.

1473057 NLS enabled JDBC drivers. This is required for non-US7ASCII and non-WE8ISO8859P1 character sets.

14.1.3.2 Step 2: Performing Post Install Steps

There are several post install steps that you need to perform after installing the patches listed in Step 1: Installing any Required Patches. These steps are described in this section.

WARNING: If you have installed the TCF server on an IBM AIX machine, then you MUST perform the steps listed in the AIX Port Instructions section.

Post Install Steps

The patches described in section Step 1: Installing Any Required Patches contain both client and mid-tier Java code. After applying any of these patches, perform the following steps:

1. Stop and start the TCF server.

   The TCF server does not pick up the latest code until it is bounced.

2. Close the browsers on the client machines.
3. Clear out the JInitiator Jackie directory on the client machines.
4. Restart the client browsers. You must do this to force the regenerated JAR files to be downloaded after you apply the patch.

AIX Port Instructions

If the TCF server is installed on an IBM AIX machine, then you must also do the following:

1. Perform the port specific instructions provided in the JDBC 8.1.6 Release notes. These Release Notes can be found on Metalling, note 114464.1.

   In addition to the environment variables specified in the JDBC release notes, you **must** update adovars.env with the following environment variable:

   `<JAVA_COMPILER>`

   set to:

   `<NONE>`

   Omitting this step causes the problem described in bug 1510941 to occur, thereby causing the Gantt chart to fail.

2. Shut down the TCF server and restart it to force the changes to take effect.

14.1.3.3 Step 3: Configuring the Servers

WARNING: Setting the communication protocol correctly is extremely critical. If this step is performed incorrectly, the client/server communication will not work.

In order for the TCF server and client to establish a connection over the network, you should set up the following using the **same** communication protocol.

- Forms servers
- File appsweb.cfg
- TCF servers

The following table lists the valid communication protocols that you can use in setting up and starting the Forms and TCF servers.

Table 14–2 Communication Protocols

Forms Mode	TCF Protocol
http	HTTP
https	SSL
socket	SOCKETS

Forms Servers

If starting the Forms server from the command line (on UNIX), then you must include the Forms "mode" argument:

```
f60ctl { start | stop } port=port_num pool=pool_num log=log_file
mode={http|https|socket} exe=exe_name
```

Valid Forms modes are:

- http
- taps
- socket

File appsweb.cfg

Modify the appsweb.cfg file (usually found under $APPL_TOP/html/bin) so that it includes the following:

```
connectMode=<protocol>
```

The connect mode parameter **must** indicate the same protocol as that which you set for the Forms server. Again, valid protocols are:

- http
- https
- socket

TCF Servers

Configure the TCF servers to start and run in the same communication protocol mode as that which you set for the Forms servers and indicated in the appsweb.cfg file.

Configuring the TCF Server Protocol

For details on configuring TCF servers, refer to the *Administering the TCF Server (11i)* documentation for a complete list of the configuration settings. It is available on Metalink (Note 123689.1).

Starting the TCF Servers

> **Note:** Oracle Applications provide a script to start and stop a TCF server. Refer to the *Installing Oracle Applications* guide, section "Review Server Process Control Scripts" for the name and location of this file.

Start the TCF server from the command line (on UNIX) using the following arguments:

```
jre oracle.apps.fnd.tcf.ServerControl [START|STOP|STATUS|UPDATE]
<portnumber|default=10021> [<param=value>]
```

Valid parameters are listed and described in the previously mentioned *Administering the TCF Server (11i)* documentation.

Note the following:

1. Oracle strongly recommends that you start the TCF server with the PROTOCOL parameter set to the same value that you set for the Forms mode argument, as described in the Forms servers section.
2. The DBC file parameter is **required**.
3. At server startup, the TCF:HOST and TCF:PORT profile options are updated with the information passed into ServerControl.
    a. If the TCF server is started using HTTP protocol, then the TCF:HOST profile is prefixed with "http://".
    b. If the TCF server is started using SOCKETS protocol, then the TCF:HOST profile is set without the "http://" prefix.

14.1.3.4 Step 4: Verifying the Server Configurations

The following table lists the required steps for verifying that the servers are configured correctly.

Table 14–3 Steps to Verify Server Configuration

Step	Action
4a	Verify that the mandatory setup steps were performed correctly.
4b	Verify the TCF Host Name and Port Number.
4c	Verify the TCF Connection.
4d	Verify that resources exist in the system.
4e	Verify that the Assignment Manager is set up correctly.

Each of these steps is described in detail in the following sections.

Step 4a: Verify Mandatory Setups

Verify that you have correctly performed all the steps listed in the previous sections:

- Step 1: Installing any Required Patches
- Step 2: Performing the Post Install Steps
- Step 3: Configuring the Servers

If necessary, repeat any steps that were not performed correctly.

Step 4b: Verify TCF Host Name and Port Number

Perform the following steps to verify that the TCF host name and port number have been set correctly.

1. Log in to your Personal Home Page (PHP) and select the System Administrator responsibility.
2. In the Navigator, select **Application > Menu**.

   The Menus window opens.
3. Select **Diagnostics > Examine** from the Help menu.

   A password protect dialog box opens.

4. Enter a valid password.

   If necessary, contact your system administrator for a valid password. After the password is authenticated, the Examine Field and Variable Values window opens.

5. Enter the following search parameters:

   - Block: $PROFILES$
   - Field: TCF:HOST

   The Value field should now display the host name of the TCF server.

   a. If the TCF server is started using HTTP protocol, then the host name must be prefixed with "http://." If this is not the case, then one of the following has occurred:

   – The TCF server was not started in HTTP mode.

   – The SocketServer class was used instead of ServerControl class to start the TCF server.

   – The system level TCF:HOST profile has been overridden at the application or user level.

   – The system level TCF:HOST profile has been manually changed on the system level.

   b. If the TCF server is started using the SOCKETS protocol, then the host name must **not** be prefixed with "http://."

   If the ServerControl class (not the SocketServer class) is used to start the TCF server, then it automatically sets the system level profile options. These profile option values can also be set manually at the system, application, or user level in Forms through the Profile menu, using the System Administrator responsibility.

   WARNING: Exercise extreme caution if you manually change these values. Setting these values incorrectly may cause the Oracle Applications client code to not be able to establish a connection to the TCF server.

   ---

6. Perform a new search, changing the value of Field to TCF:PORT.

The Value field should reflect the number of the port on which the TCF was started.

Step 4c: Verify the TCF Connection

Using the Menu Tree Viewer, perform the following steps to verify that the TCF connection is working properly:

1. Log in to your Personal Home Page (PHP), if you are not already there, and select the Application Developer responsibility.
2. Select **Application > Menu**.
3. Query up the JTF_NAVIGATE Menu item.
   a. Select **View > Query by Example > Enter**.
   b. Enter JTF_NAVIGATE in the Menu field.
   c. Select **View > Query by Example > Run**.

      The Menus window populates with the information.
4. Click **View Tree**.

   You should see a tree like structure that corresponds to the Navigator hierarchy for the CRM Administrator responsibility.

If you get an error after clicking **View Tree**, then the TCF Server has not been set up properly. The error may read - The application was unable to establish a network connection with the TCF SocketServer listening on port: <#####> on host: http:/// Please contact your system administrator.

Note: If you are unable to establish a TCF connection, then a generic TCF setup problem could exist. Contact your System Administrator or Oracle Support representative to resolve the issue. Until this issue is resolved, Gantt will not work properly.

The Menu and View Tree forms are owned by the Oracle Application Object Library (AOL). It could be that this is an issue that needs to be resolved within that context.

Step 4d: Verify Resources Exist

Perform the following to verify that resources are available in the system.

Note: Refer to the *Oracle Common Application Components User Guide*, and the *Oracle Common Application Components Implementation Guide* for details on setting up and configuring the Resource Manager

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Log on as the APPS user using SQL*Plus and run the following SQL statement. This returns resources that you can use to query in the Assignment Manager: Unassisted mode:

```
SELECT jtf_task_utl.get_owner(r.resource_type ,r.resource_id)
       resource_name
      ,r.resource_id
      ,r.resource_type
      ,o.name -- This is a descriptive name of the resource type
FROM ( select resource_id
      ,decode(category,'EMPLOYEE','RS_EMPLOYEE'
      ,'PARTNER','RS_PARTNER'
      ,'SUPPLIER_CONTACT','RS_SUPPLIER'
      ,'PARTY','RS_PARTY'
      ,'OTHER','RS_OTHER') resource_type
FROM jtf_rs_resource_extns) r
      ,jtf_objects_vl o
      ,jtf_object_usages u
WHERE r.resource_type  = o.object_code
AND o.object_code      = u.object_code
AND u.object_user_code = 'RESOURCES';
```

The result of running this query is a list of the defined resources that you can use to verify that the Gantt chart is set up correctly.

Step 4e: Verify the Assignment Manager Setup

Perform the following steps to verify that all the installation and setup steps for the Oracle Common Application Components Assignment Manager have been performed correctly.

Note: Refer to the *Oracle Common Application Components User Guide*, and the *Oracle Common Application Components Implementation Guide* for details on setting up and configuring the Assignment Manager.

---

1. Log in to your Personal Home Page (PHP) and select the CRM Administrator responsibility.
2. In the Navigator menu, select **Task and Escalation Manager > Manage Escalations**.
3. Enter sample text into the Escalation Summary field.
4. Click **Assign**.

   The Assignment Manager window opens.
5. Select the **Unassisted** option button.
6. In the Resource Partial Name field, enter the first few letters from one of the names returned by the SQL statement in the previous section (Step 4d: Verify Resources Exist) and suffix the name with a percent "%" character.
7. Click **Search**.
   - If the Gantt and TCF servers are working and have been set up correctly, then you will see the resource name at the left side of the Gantt chart. If the Forms-based Calendar module is defined correctly, then you also see Shifts (yellow background color) and Tasks (blue and red bars).

     For a task to be visible, it must exist, and have a scheduled start date and end date that fall within the visible time range, and be assigned to a resource.
   - If an "APP-JTF-210807: No Resources Found. Please Try Again." message is returned, then you have entered a name that does not exist, or alternatively there may be a problem in Assignment Manager.
   - If nothing is returned, check the JInitiator Console Window for exceptions.

Note: Another reason for no resource found could be caused by:

Patch 1883463 was applied and enable TCF to run as a servlet. Files zone.properties and jserv.properties were configured incorrectly.

Resolution:

1. The file zone.properties under the Apache install configuration directory (/Apache/Jserv/etc) should include the lines:

servlets.default.initArgs=FND_
TOP=servlets.startup=oracle.apps.fnd.tcf.SocketServer

2. The file jserv.properties (also under /Apache/Jserv/etc) should include the lines: wrapper.classpath=<8.0.6 oracle home>/forms60/java/f60srv.jar

---

Step 5: Troubleshoot Any Subsequent Problems

If any subsequent problems develop in configuring the TCF Server, consult the Assignment Manger Troubleshooting Chapter for more information.

14.2 Setting Profile Options

The following table lists the profile options used for implementing Assignment Manager. You can set these options in any sequence.

Table 14–4 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
Activate Auto Selection of Resources	Yes	Application	This profile option is set to activate the auto-selection of resources by the Assignment Manager engine. The engine uses this profile option setting to determine where the user needs to make a selection from the provided list of resources, or if this task is performed automatically by the Assignment Manager engine itself.	If you set this profile option to **No**, the Assignment Manager engine will automatically make a selection from the provided list of resources.

Table 14–4 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
Activate Contracts Preferred Resources	No	Application	This profile option is set to retrieve the preferred resource information from the Contracts module. The engine uses this profile option setting to determine whether the Contracts Preferred Engineers are picked up automatically by the Assignment Manager engine or not.	If you set this profile option to **No**, it will uncheck the Contracts check box in the Assignment Manager.
Activate Installed Base Preferred Resources	No	Application	This profile option is set to retrieve the preferred resource information from the Installed Base module. The engine uses the profile option setting to determine whether the Installed Base Preferred Engineers are picked automatically by the engine.	If you set this profile option to **No**, it will uncheck the Installed Base check box in the Assignment Manager.
Activate Workflow Name	No default value	Application	This profile option is set to a user-defined workflow procedure name. This workflow procedure is user-programmed code for further filtering the resources. The engine retrieves the procedure name from this profile option, and uses it to process the user's request.	This profile option is an additional filter based on the user's criteria.
JTFAM: Resource Type for Unassisted Mode	Employee Resource	Site	This profile option sets the default value for resource type in the unassisted mode.	This profile option is a convenience to the user who wants the resource type to be the defaulted value in the unassisted mode.

Table 14–4 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
JTFAM:Use systime for Assignments	Yes	Site	This profile option enables the start time for a resource's shift to be determined by either the SYSDATE or the start date and time of the relevant task.	When set to **Yes**, the Assignment Manager uses the SYSDATE and TIME functions to determine the start of a resource's shift. When set to **No**, Assignment Manager uses the task start date and time to determine the start of the shift

Table 14–4 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
JTFAM: Resource Search Order	Contracts Preferred Resource	Site	This profile option sets the default order for resource selection between Contracts and Installed Base if both check boxes are selected in the Assignment Manager for a service request assignment.	If Contracts Preferred Resource is selected, then Assignment Manager engine checks Contracts preferred resources first. If a Contracts preferred resource is found, then stop the process. If not, then check the Installed Base preferred resources. If a Installed Base preferred resource is found, and stop the process. If not, then continue check the territories. If Installed Base Preferred Resource is selected, then Installed Base preferred resources are checked first, if a resource is found, then stop the process. If not, then continue check the Contracts. If "Both Contracts and Installed Base" is selected, then Assignment Manager checks both preferred resources simultaneously before retrieving qualified resources from winning territories.

Table 14–4 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
JTFAM: Usage for Groups and Teams	All	Site	This profile option sets the default value for the group and team resource selection used in a service request assignment.	If it is set to **All**, then all group or team resources, regardless of its usage, are all displayed in the Gantt chart. If it is set to **Support**, then only the group or team with Support usage can then be retrieved for a service request assignment.

Note: See Appendix A, Profiles Options, for details on how these profile options can be set.

14.3 Setting Up Other Dependencies

The following components must be properly configured to ensure full use of the Assignment Manager selection criteria:

- **Territory Manager** retrieves qualified resources specified in territories. Make sure that transaction qualifiers are set up correctly and qualified resources are specified when defining territories. Territories should be set up properly in order to use the Assisted assignment option or the Intelligent and Window to Promise assignment options in the Field Service Dispatch Center.
- **Forms-based Calendar** displays the work shift information of qualified resources. Resources' shift schedules should be defined in the Forms-based Calendar module in order to use the Resource Availability for the Assisted assignment option or the Intelligent and Window to Promise assignment options in the Field Service Dispatch Center.

Note: Log in with the CRM Administrator responsibility and select Calendar > Calendar Setup to access the calendar setup windows.

- **Service Request** designates a resource as Web available or unavailable. It assigns the resource Web availability by using the Territory Assisted assignment option and assigns resources by using the Intelligent and Window to Promise assignment options in the Field Service Dispatch Center.
- **Oracle Contracts** specify preferred engineers defined in Contracts. This components enables the use of Contracts preferred resources in the Assisted assignment option or the Intelligent and Window to Promise assignment options in the Field Service Dispatch Center.
- **Installed Base** specifies preferred resources defined in Installed Base. This components enables the use of Installed Base preferred resources in the Assisted assignment option or the Intelligent and Window to Promise assignment options in the Field Service Dispatch Center.

14.4 Configuring Color Coded Tasks

Assignment Manager displays a resource's tasks for a specified time period in the Gantt chart. The time period for each task is color coded according to a set of rules stored in the color configuration table. Each row in this table contains rules for a unique color values. Assignment Manager accesses a Task Manager table with seeded color values that can be retained in their original state or modified. You can also configure additional color values. When Assignment Manger obtains the list of tasks to display for a resource, the Assignment Manager engine calls the Tasks public API: JTF_TASK_CUSTOM_COLORS_PUB.GET_TASK_BGCOLORS. The API receives information about the task, task type, assignment status, and priority, and returns the background color value for each record in decimal format. The Assignment Manger UI interprets the color's decimal value and displays it in standard color format.

14.4.1 Color Configuration Table

The attributes that determine a task color can be registered with those of the currently displayed color in the color configuration table. The following table contains the color configuration table columns and their corresponding attributes:

Table 14–5 Assignment Manager Color Configuration Table

Column	Function	Primary Key	Mandatory	Data Type
RULE_ID	Provides a unique identifier for each rule.	Yes	Yes	Number
OBJECT_VERSION_NUMBER	Maintains the revisions of each table row.	No	Yes	Number
COLOR_DETERMINATION_PRIORITY	Provides a numeric value for determining the order in which the color will be evaluated by the GET_TASK_BGCOLORS procedure.	No	Yes	Number
TYPE_ID	Identifies the task type.	No	No	Number
PRIORITY_ID	Determines the priority level.	No	No	Number
ASSIGNMENT_STATUS_ID	Determines the task assignment status.	No	No	Number
ESCALATED_TASK	Specifies whether or not the task is escalated.	No	No	Varchar2(1)
BACKGROUND_COL_DEC	Provides a decimal version of the color.	No	Yes	Number
BACKGROUND_COL_RGB	Provides an RGB virions of the color.	No	Yes	Varchar2(12)
CREATED_BY	Provides the identity of the individual who created the task color.	No	Yes	Number
CREATION_DATE	Provides the date on which the task color was created	No	Yes	Date
LAST_UPDATED_BY	Provides the identity of the individual who last updated data for the task color.	No	Yes	Number

Table 14–5 Assignment Manager Color Configuration Table

Column	Function	Primary Key	Mandatory	Data Type
LST_UPDATE_DATE	Provides the date on which the task color data was last updated.	No	Yes	Date
LAST_UPDATE_LOGIN	Displays the login information of the last person to update the record.	No	No	Number
ACTIVE_FLAG	Specifies whether the task color is active or not. If the task color is not active, then its information can be overwritten by subsequent patch installations.	No	Yes	Varchar2(1)

14.4.2 Seeded Color Configuration Data

Assignment Manger provides seeded data for red, golden yellow, and blue background colors. These colors represent specific functions based on the following business logic:

Table 14–6 Assignment Manager Seeded Colors

Color	Function
Red	Displays escalations.
Golden Yellow	Displays shifts
Blue	Displays assigned tasks.

These colors can be used, modified, or flagged for nonuse as required but should not be removed from the color configuration table. If you do not want to use a seeded color, you must flag it for nonuse by setting the ACTIVE_FLAG column in the color configuration table to "N". If you modify seeded data, then it will not be overwritten by any subsequent patch installations. If, however, you do not modify seeded data, then it will be overwritten by the seed data of any subsequently installed patches. The following table contains Assignment Manager seeded color data information:

Table 14–7 Assignment Manager Seeded Colors Data

Color Configuration Table Column	Red Data	Golden Yellow Data	Blue Data
RULE_ID	1	2	3
COLOR_DETERMINATION_PRIORITY	10	20	100
TYPE_ID	Null	Null	Null
PRIORITY_ID	Null	Null	Null
ASSIGNMENT_STATUS_ID	Null	5	Null
ESCALATED_TASK	Y	N	Null
BACKGROUND_COL_DEC	16711680	16776960	3342591
BACKGROUND_COL_RGB	Red	GoldenYellow	Blue
ACTIVE_FLAG	Y	Y	Y

14.4.3 Hard Coded Colors

In addition to providing seeded colors, Assignment Manager contains two hard coded colors that cannot be modified. These colors are reserved for specific Assignment Manager business logic and should not be duplicated in the color configuration table:

Table 14–8 Assignment Manager Hard Coded Colors

Color	Decimal Value	Function
Green	44370	Displays available time slots.
Yellow	16776960	Task assignments that are in status Working.

14.4.4 Guidelines

To properly configure color coded tasks in Assignment Manger you must adhere to the following guidelines:

14.4.4.1 Determining Task Color Per Resource

Assignment manager determines the task color for each resource. The color of multiple tasks can be determined in one API call, however, some applications such as Field Service determine the color by using an inline function call in a SQL statement.

14.4.4.2 Evaluating Color Prioritization

Each record in the color configuration table contains rules for displaying a unique task color. The GET_TASK_BGCOLORS procedure evaluates these rules for each row in ascending order beginning with the row that contains the lowest value in the COLOR_DETERMINATION_PRIORITY column. When creating or modifying colors, consider the order in which you want them evaluated and insert values in the COLOR_DETERMINATION_PRIORITY column accordingly.

14.4.4.3 Creating Values for the RULE_ID Column

The RULE_ID column must contain unique sequential values. This is accomplished by using the sequence JTF_TASK_CUSTOM_COLOR_S.

14.4.4.4 Creating Values for the COLOR_DETERMINATION_PRIORITY Column

The value of the column COLOR_DETERMINATION_PRIORITY must be a unique number between 0 and 100.

14.4.4.5 Creating Values for the LAST_UPDATED_BY Column

If seed data is modified, then the value of column LAST_UPDATED_BY should be set to a value other than 0 and 1.

14.4.4.6 Using Unique Colors for Each Function

If you use the same color to represent availability, shifts, task load, or escalations you will not be able to differentiate between each function. For this reason, each function must be represented with a unique color.

14.4.4.7 Using Different Background and Foreground Colors

If you use identical background and foreground colors it will be difficult to infer if the colors actually correspond to a given task. Because Assignment Manger currently does not perform validation for separate background and foreground colors, it is the implementor's responsibility to ensure that they are not identical.

14.4.4.8 Reserving Assignment Manager Hard Coded Colors

Do not create custom color values for the hard for the green and yellow hard coded colors that ship with Assignment Manager.

14.4.5 Examples

This section contains examples for creating two new task colors to denote high priority and low priority tasks that have been rejected. In this example, the implementor wants the high priority rejected tasks to be evaluated and displayed in Assignment Manger before the low priority rejected tasks.

14.4.5.1 Creating Violet Color for High Priority Rejected Tasks

Assume that the implementor creates a record for the color DarkViolet that represents high priority rejected tasks. The following table contains data for the color DarkViolet that is used to denote high priority rejected tasks. Since the value in the COLOR_DETERMINATION_PRIORITY column is 5, the rules for this task color will be evaluated by the GET_TASK_BGCOLORS procedure before any task color with a value in this column of 6 or higher.

Table 14–9 DarkViolet Color Example Data

Color Configuration Table Column	Violet Color Data
RULE_ID	101
COLOR_DETERMINATION_PRIORITY	5
TYPE_ID	Null
PRIORITY_ID	1
ASSIGNMENT_STATUS_ID	4
BACKGROUND_COL_DEC	9400D3
ESCALATED_TASK	N
BACKGROUND_COL_RGB	DarkViolet
ACTIVE_FLAG	Y

SQL Script

The following script creates a record for the DarkViolet color in the color configuration table:

```
SET SERVEROUTPUT ON
DECLARE
   l_rowid      ROWID;
   l_color_id   NUMBER;
BEGIN
   fnd_global.apps_initialize (
```

```
      user_id => 100001746, -- login user id
      resp_id => 0,  --- responsibility id
      resp_appl_id => 0,
      security_group_id => 0
   );

   SELECT jtf_task_custom_colors_s.nextval
     INTO l_color_id
     FROM dual;

   jtf_task_custom_colors_pkg.insert_row (
      x_rowid => l_rowid,
      x_rule_id => l_color_id,   ---101
      x_color_determination_priority => 5,
      x_type_id => null,
      x_priority_id => 1,
      x_assignment_status_id => 4,
      x_escalated_task => 'Y',
      x_active_flag => 'Y',
      x_background_col_dec => 9400D3,
      x_background_col_rgb => 'r148g000b211',  --DarkViolet
      x_creation_date => SYSDATE,
      x_created_by => fnd_global.user_id,
      x_last_update_date => SYSDATE,
      x_last_updated_by => fnd_global.user_id,
      x_last_update_login => 0
   );
END;
/
COMMIT;
EXIT;
```

14.4.5.2 Creating Lime Green Color for Low Priority Rejected Tasks

Assume that the implementor creates a record for the color LimeGreen that represents low priority rejected tasks. The following table contains data for the color LimeGreen that is used to denote low priority rejected tasks. Since the value in the COLOR_DETERMINATION_PRIORITY column is 7, the rules for this task color will be evaluated by the GET_TASK_BGCOLORS procedure after those of the high priority rejected task color in the preceding example.

Table 14–10 Lime Green Color Example Data

Color Configuration Table Column	Violet Color Data
RULE_ID	102
COLOR_DETERMINATION_PRIORITY	7
TYPE_ID	Null
PRIORITY_ID	Null
ASSIGNMENT_STATUS_ID	4
ESCALATED_TASK	N
BACKGROUND_COL_DEC	00FF00
BACKGROUND_COL_RGB	LimeGreen
ACTIVE_FLAG	Y

SQL Script

The following script creates a record for the LimeGreen color in the color configuration table:

```
SET SERVEROUTPUT ON
DECLARE
   l_rowid      ROWID;
   l_color_id   NUMBER;
BEGIN
   fnd_global.apps_initialize (
      user_id => 100001746, -- login user id
      resp_id => 0,  --- responsibility id
      resp_appl_id => 0,
      security_group_id => 0
   );

   SELECT jtf_task_custom_colors_s.nextval
     INTO l_color_id
     FROM dual;

   jtf_task_custom_colors_pkg.insert_row (
      x_rowid => l_rowid,
      x_rule_id => l_color_id,   ---102
      x_color_determination_priority => 7,
      x_type_id => null,
      x_priority_id => NULL,
```

```
        x_assignment_status_id => 4,
        x_escalated_task => 'Y',
        x_active_flag => 'Y',
        x_background_col_dec => 00FF00,
        x_background_col_rgb => 'r50g205b50',   --LimeGreen
        x_creation_date => SYSDATE,
        x_created_by => fnd_global.user_id,
        x_last_update_date => SYSDATE,
        x_last_updated_by => fnd_global.user_id,
        x_last_update_login => 0
   );
END;
/
COMMIT;
EXIT;
```

14.5 Customizing the Assignment Manager UI

The Assignment Manager UI can be customized to better suit the requirements of the applications with which it is integrated. These applications which include Tasks, Service Requests as well as Service Request Tasks, and Escalations generally require a limited subset of the total fields and options available in the Assignment Manager UI. Assignment Manager renders the UI based on seeded data in the table JTF_AM_SCREEN_SETUPS_B. When implementing Assignment Manager, you can customize its UI by modifying data in this table.

14.5.1 Table JTF_AM_SCREEN_SETUPS_B

The following table describes JTF_AM_SCREEN_SETUPS_B including Who columns and Flex field columns. Columns directly related to modifying the Assignment Manager UI are indicated accordingly:

Table 14–11 Table: JTF_AM_SCREEN_SETUPS_B

Column Name	Data Type	Not Null	Default	Description
SCREEN_SETUP_ID	Number	N	N	**UI Related**. Specifies the unique ID for the table.
DOCUMENT_TYPE	Varchar2(30)	N	N	**UI Related**. Specifies the document from which Assignment Manager is called, such as SR (Service Request). This will be unique for the table.

Column Name	Data Type	Not Null	Default	Description
MODE_ASSIST	Varchar2(1)	N	Y	**UI Related**. Determines whether or not the UI displays the Assisted mode radio button. Valid values are Y/N.
MODE_UNASSIST	Varchar2(1)	N	Y	**UI Related**. Determines whether or not the UI displays the Unassisted mode radio button. Valid values are Y/N.
CONTRACTS	Varchar2(1)	N	Y	**UI Related**. Determines whether or not the UI displays the Contracts checkbox. Valid values are Y/N.
INSTALLED_BASE	Varchar2(1)	N	Y	**UI Related**. Determines whether or not the UI displays the Install Base checkbox. Valid values are Y/N.
TERRITORY	Varchar2(1)	N	Y	**UI Related**. Determines whether or not the UI displays the Territories checkbox. Valid values are Y/N.
AVAILABILITY	Varchar2(1)	N	Y	**UI Related**. Determines whether or not the UI displays the Resource Availability checkbox. Valid values are Y/N.
DOC_DETAILS	Varchar2(1)	N		**UI Related**. Determines whether or not the UI displays Document Details. Valid values are Y/N.
WINDOW_WIDTH	Number	N	7	**UI Related**. Determines the width of the window for the Assignment Manager screen in inches.
WINDOW_HEIGHT	Number	N	5	**UI Related**. Determines the height of the window for the Assignment Manager screen in inches.
WINDOW_X_POSITION	Number	N	0	**UI Related**. Specifies the Assignment Manager screen position's X co-ordinates.
WINDOW_Y_POSITION	Number	N	0	**UI Related**. Specifies the Assignment Manager screen position's Y co-ordinates.
DOC_DTLS_USER_VALUES	Varchar2(1)	N	N	**UI Related**. Provides the Products team the flexibility to customize what the UI displays in the Document Details section. Valid values are Y/N. This setting only works if the DOC_DETAILS column is set to Y.

Column Name	Data Type	Not Null	Default	Description
SHOW_SELECTED_TIME	Varchar2(1)	N	Y	**UI Related**. Determines whether or not the UI displays the selected resource's start and end time. Valid values for this column are Y/N.
OBJECT_VERSION_NUMBER	Number	Y	N	The object version number.
USER_ID	Number	N	N	The user ID.
ATTRIBUTE1	Varchar2(150)	N	N	Flex field.
ATTRIBUTE2	Varchar2(150)	N	N	Flex field.
ATTRIBUTE3	Varchar2(150)	N	N	Flex field.
ATTRIBUTE4	Varchar2(150)	N	N	Flex field.
ATTRIBUTE5	Varchar2(150)	N	N	Flex field.
ATTRIBUTE6	Varchar2(150)	N	N	Flex field.
ATTRIBUTE7	Varchar2(150)	N	N	Flex field.
ATTRIBUTE8	Varchar2(150)	N	N	Flex field.
ATTRIBUTE9	Varchar2(150)	N	N	Flex field.
ATTRIBUTE10	Varchar2(150)	N	N	Flex field.
ATTRIBUTE10	Varchar2(150)	N	N	Flex field.
ATTRIBUTE12	Varchar2(150)	N	N	Flex field.
ATTRIBUTE13	Varchar2(150)	N	N	Flex field.
ATTRIBUTE14	Varchar2(150)	N	N	Flex field.
ATTRIBUTE15	Varchar2(150)	N	N	Flex field.
ATTRIBUTE_CATEGORY	Varchar2(150)	N	N	
CREATED_BY	Number	Y	N	
CREATION_DATE	Date	Y	N	
LAST_UPDATED_BY	Number	Y	N	
LAST_UPDATE_DATE	Date	Y	N	
LAST_UPDATE_LOGIN	Number	Y	N	
SECURITY_GROUP_ID	Number	N	N	

14.5.2 Supported Document Types

Assignment Manager supports document types in FND_LOOKUPS (LOOKUP_TYPE = JTF_AM_DOCUMENT_TYPE) as follows:

Table 14–12 Assignment Manager Supported Document Types

Document Type	Definition
SR	Service Request
TASK	Tasks
SR_TASK	Service Request Task
ESC	Escalations
DEF	Defects
LEAD	Leads
OPPR	Opportunities
ACC	Accounts

14.5.3 UI Layout Rules

The Assignment Manager UI must be customized according to a specific set of rules. These rules specify how the UI is rendered and which columns in the table JTF_AM_SCREEN_SETUPS_B contain information that is based on the values of other columns in this table.

14.5.3.1 Document Type

The document type must be unique across the table. A unique constraint is enforced using a unique index on the DOCUMENT_TYPE column. Based on the DOCUMENT_TYPE data passed in the new AM_UI_TYPE parameter in forms, the UI is rendered accordingly. If no data is passed in the AM_UI_TYPE parameter, then the UI is rendered based on value of the existing AM_CALLING_DOC_TYPE parameter.

14.5.3.2 Assisted and Unassisted Mode

Assignment Manager displays the Mode window and its corresponding options depending on the value of the MODE_ASSIST and MODE_UNASSIST columns based on the following rules:

Table 14–13 Assisted and Unassisted Mode Rules

MODE_UNASSIST	MODE_ASSIST	Remarks
N	N	Both the modes cannot be set to 'N' at the same time. If this combination is set for any document type then the UI will not be rendered when called for that document.
N	Y	1. Mode window will not appear. 2. Only Assisted Mode's corresponding fields will be shown.
Y	N	1. Mode window will not appear. 2. Only Unassisted Mode's corresponding fields will be shown.
Y	Y	The UI will default to the existing UI layout and will show both Assisted and Unassisted modes as well as their corresponding field.

Assisted Mode

In case of assisted mode, at least one of the following search options should be enabled in the table:

- Contracts
- Installed Base
- Territories
- Availability

If for example, the value of the MODE_ASSIST column is 'Y' then at least one of the preceding four values must also be 'Y'.

14.5.3.3 Intelligent and Window to Promise modes

Because the Intelligent and Window to Promise modes are not supported in the post 11.5.6 version of the Assignment Manager UI, neither one can be customized.

14.5.3.4 Document Details

Document Details can be customized based on the values entered in the DOC_DETAILS and DOC_DTLS_USER_VALUES columns according to the following rules:

Table 14–14 Document Details Rules

DOC_DETAILS	DOC_DTLS_USER_VALUES	Remarks
N	N/Y	The UI will not show document details at all. It will disregard the values entered for DOC_DTLS_USER_VALUES column.
Y	N	1. Document Details will be displayed. 2. The content of Document details will be the default layout content i.e. it will continue to display whatever it is displaying in existing version of AM UI.
Y	Y	1. Document Details will be displayed. 2. The content of Document details will be the name-value pairs passed to AM UI from the product team using record type JTF_ASSIGN_PUB.DOC_DETAILS_REC. 3. If DOC_DTLS_USER_VALUES is set to Y but no data is passed in record, then the document details box will be displayed with null value.

Record Type JTFAMSR.DOC_DETAILS_REC_TYPE

The calling document can only customize the Document details section and display a set of name/value pairs in that section, if the JTFAMSR.DOC_DETAILS_REC_TYPE is populated with the appropriate values. The record type is defined as follows:

```
TYPE DOC_DETAILS_REC_TYPE IS RECORD_TYPE
 (
Field_prompt1varchar2 (20):= NULL,
Field_value1varchar2 (150) := NULL,
Field_prompt2varchar2 (20):= NULL,
Field_value2varchar2 (150) := NULL,
Field_prompt3varchar2 (20):= NULL,
Field_value3varchar2 (150) := NULL,
Field_prompt4varchar2 (20):= NULL,
Field_value4varchar2 (150) := NULL,
Field_prompt5varchar2 (20):= NULL,
Field_value5varchar2 (150) := NULL
)
```

14.5.3.5 Selected Resource Details

When a user double clicks a resource from the list of resources, it is selected for assignment and the Resource Details fields subsequently contain the following:

- Resource Name
- Resource Type
- Start Time
- End Time

The Start Time and End Time display is determined by the value in the value SHOW_SELECTED_TIME column according to the following rules:

Table 14–15 Start Time and End Time Display Rules

SHOW_SELECTED_TIME	Remarks
N	The UI will show only Resource Name and Resource Type.
Y	The UI will show Resource Name, Resource Type, Start Time, and End Time.

14.5.3.6 Width and Height

The width and height of the Assignment Manager window is specified according to the following rules:

- The value of the WINDOW_WIDTH and WINDOW_HEIGHT columns cannot be a negative number or 0. When a negative number or 0 are entered as the value of these columns, Assignment Manager uses the default window size values.
- When valid values are populated in these columns, the Assignment Manager UI either resizes accordingly or reverts to the default values of 7 inches for width and 5 inches for height.

14.5.3.7 Window Position

The position of the Assignment Manager window is specified according to the following rules:

- The value of the WINDOW_X_POSITION and WINDOW_Y_POSITION columns cannot be negative.

- If no values are specified for the WINDOW_X_POSITION and WINDOW_Y_POSITION columns, they revert to the default value of 0

14.5.4 Customization Guidelines

The Assignment Manager UI must be customized according to specific guidelines.

14.5.4.1 Add Required Values to LAST_UPDATED_BY Column

When customizing the Assignment Manager UI, the implementor or System Administrator should always update the LAST_UPDATED_BY column with the appropriate user ID. Customized rows must not have values of **0** or **1** in the LAST_UPDATED_BY column, otherwise the data will be lost when a new patch is applied.

Example

In the following example, text marked in **bold** will change depending on the value added by the implementor or system administrator. The LAST_UPDATED_BY column contains an appropriate values that is neither **0** or **1**:

```
UPDATE     JTF_AM_SCREEN_SETUPS_B
SET           mode_assist= 'N'
        , last_update_date = sysdate
 , last_updated_by = 100
, object_version_number = object_version_number + 1
        WHERE document_type = 'TASK'
/
```

14.5.4.2 Populate the LAST_UPDATED_BY Column with the Required Sequence

To insert the data in the table JTF_AM_SCREEN_SETUPS_B, the sequence JTF_AM_SCREEN_SETUPS_S.NXTVAL should be used for SCREEN_SETUP_ID column. For inserts in the table, the data MUST be entered in both JTF_AM_SCREEN_SETUPS_B and JTF_AM_SCREEN_SETUPS_TL tableS.

14.5.4.3 Modify Assignment Manager UI Seeded Data as Required

Seeded data for the Assignment Manger UI is stored in the tables JTF_AM_SCREEN_SETUPS_B and JTF_AM_SCREEN_SETUPS_TL. To customize the Assignment Manager UI, you must modify the seeded data as required. The following tables list the seeded Assignment Manager UI values for each calling document:

Table 14–16 Assignment Manager UI Seeded Data in JTF_AM_SCREEN_SETUPS_B

Columns	Tasks	Service Request	Escalations	Service Request Tasks
SCREEN_SETUP_ID	1	2	3	4
DOCUMENT_TYPE	TASK	SR	ESC	SR_TASK
MODE_ASSIST	Y	Y	Y	Y
MODE_UNASSIST	Y	Y	Y	Y
CONTRACTS	Y	Y	Y	Y
INSTALLED_BASE	Y	Y	Y	Y
TERRITORY	Y	Y	Y	Y
AVAILABILITY	Y	Y	Y	Y
DOC_DETAILS	Y	Y	Y	Y
WINDOW_WIDTH	7.7	7.7	7.7	7.7
WINDOW_HEIGHT	6.4	6.4	6.4	6.4
WINDOW_X_POSITION	0	0	0	0
WINDOW_Y_POSITION	0	0	0	0
DOC_DTLS_USER_ VALUES	N	N	N	N
SHOW_SELECTED_TIME	Y	Y	Y	Y
CREATED_BY	1	1	1	1
CREATION_DATE	1-OCT-02	1-OCT-02	1-OCT-02	1-OCT-02
LAST_UPDATED_BY	1	1	1	1
LAST_UPDATE_DATE	1-OCT-02	1-OCT-02	1-OCT-02	1-OCT-02
OBJECT_VERSION_ NUMBER	1	1	1	1

Table 14–17 JTF_AM_SCREEN_SETUPS_TL

Columns	Tasks	Service Request	Escalations	Service Request Tasks
SCREEN_SETUP_ID	1	2	3	4
PREFERENCE_NAME	Default Task	Default Service Request	Default Escalations	Default Service Request Task
CREATED_BY	1	1	1	1
CREATION_DATE	1-OCT-02	1-OCT-02	1-OCT-02	1-OCT-02
LAST_UPDATED_BY	1	1	1	1
LAST_UPDATE_DATE	1-OCT-02	1-OCT-02	1-OCT-02	1-OCT-02
SOURCE_LANG	US	US	US	US
LANGUAGE	US	US	US	US

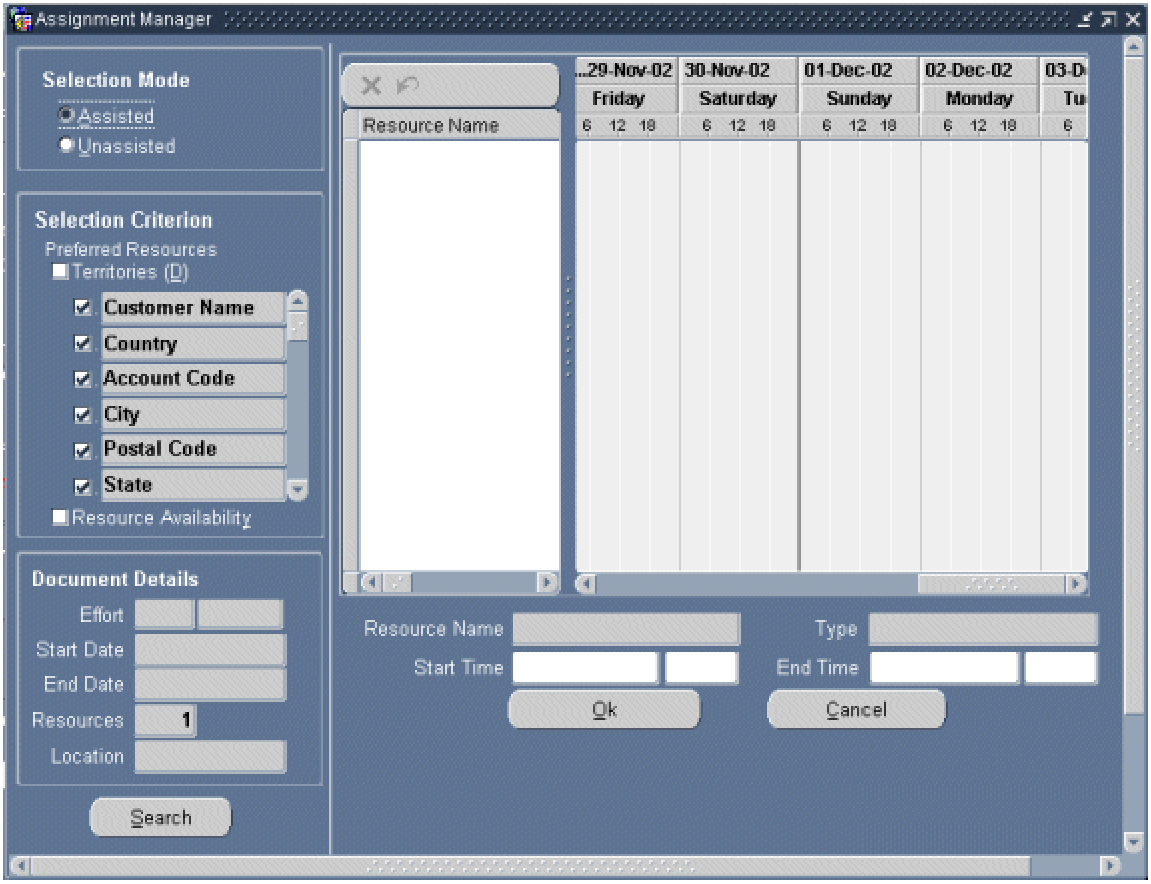
14.5.5 Examples

This section provides examples of customizing the Assignment Manager UI for different calling documents.

14.5.5.1 Service Request

When the calling document is a Service Request, the default Assignment Manager UI includes the Assisted Mode and Unassisted Mode radio buttons, the Start Time and End Time fields, as well as the default Document Details fields.

Figure 14–1 Default Service Request Screen

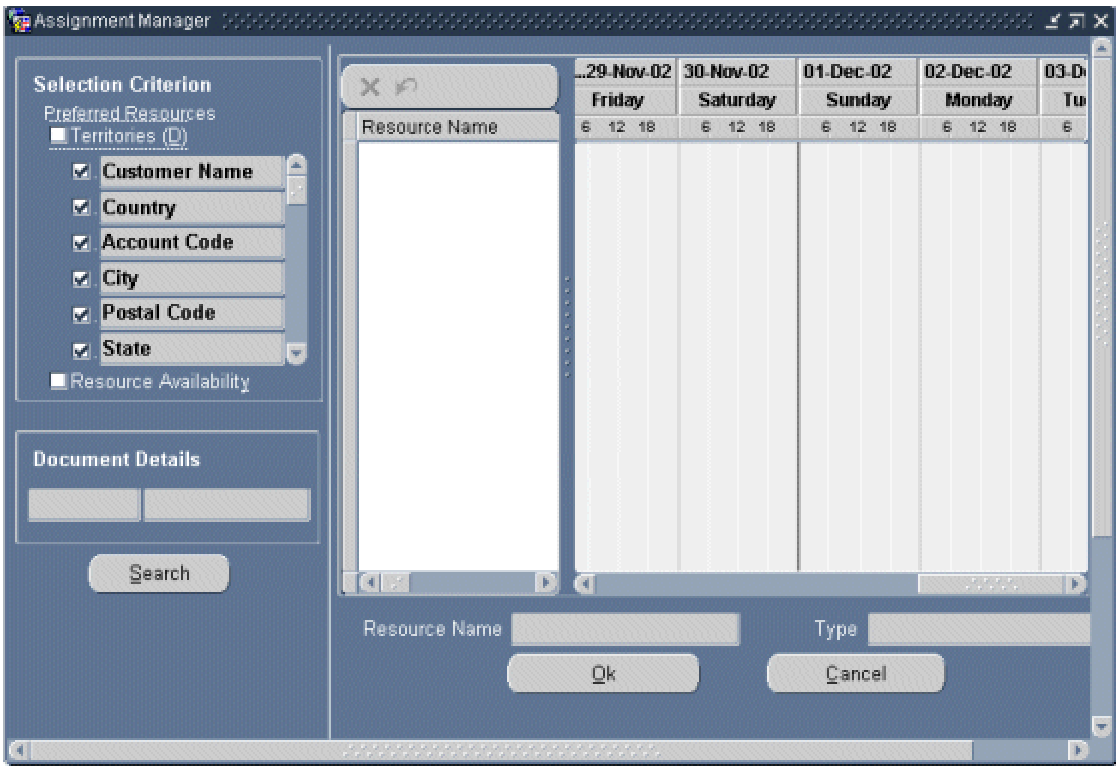


Since the Assisted Mode and Unassisted Mode radio buttons, the Start Time and End Time fields, are not required by the Service Request application, you can modify the table JTF_AM_SCREEN_SETUPS_B to render the Assignment Manager UI without these features. You can also modify the Document Details section with your own custom fields. The following SQL script customizes the Assignment Manager UI in this manner:

```
UPDATE jtf_am_screen_setups_b
SET     mode_unassist             = 'N'
      ,doc_dtls_user_values = 'Y'
      ,show_selected_time   = 'N'
```

```
      ,last_updated_by          = 123 -- userid of user who is updating
      ,last_update_date         = SYSDATE
      ,object_version_number= object_version_number + 1
WHERE  document_type = 'SR'
```

Figure 14–2 Customized Service Request Screen

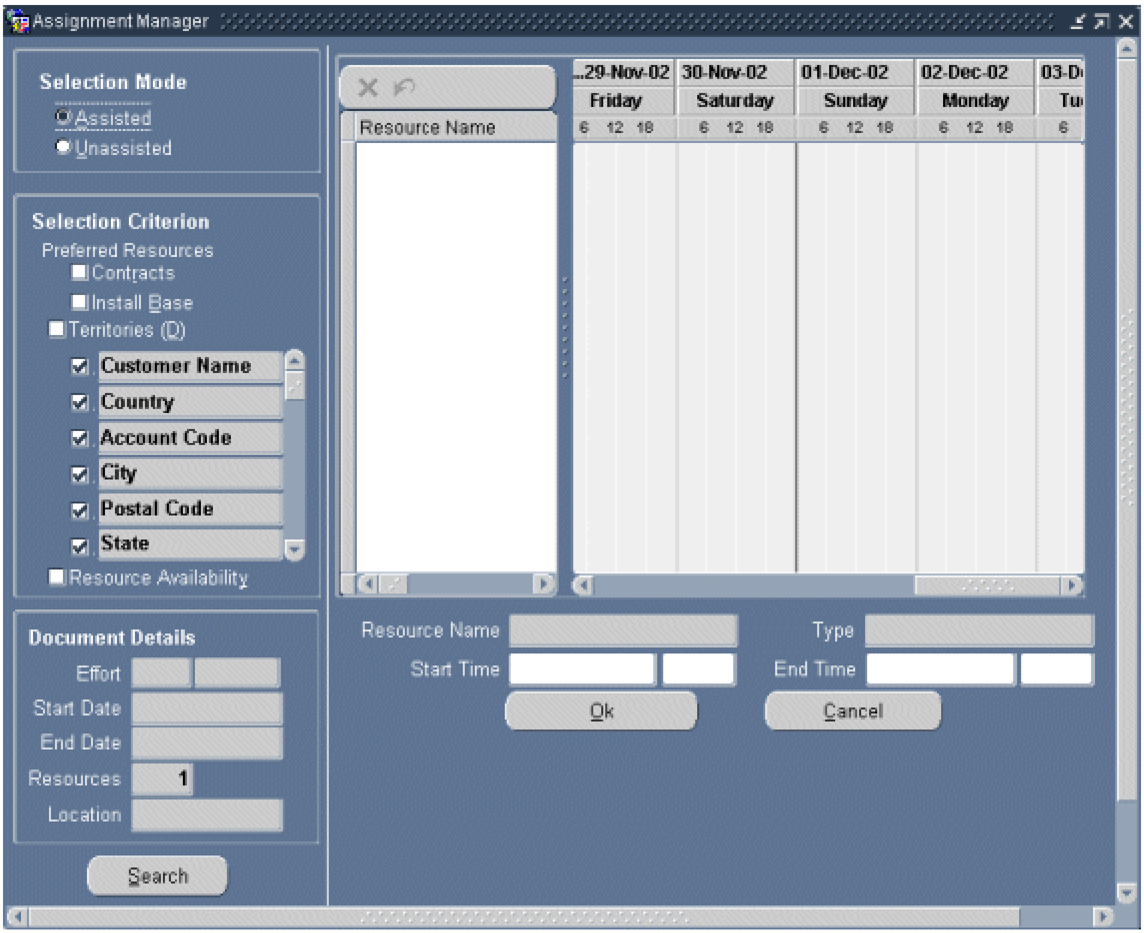


Note: Changing the **DOC_DTLS_USER_VALUES** column enables you to display custom fields in the Document Detail section. These fields will not appear, however, unless you populate the JTFAMSR.DOC_DETAILS_REC_TYPE with the appropriate name/value pairs.

14.5.5.2 Service Request Task

When the calling document is a Service Request Task, the default Assignment Manager UI includes the Assisted Mode and Unassisted Mode radio buttons.

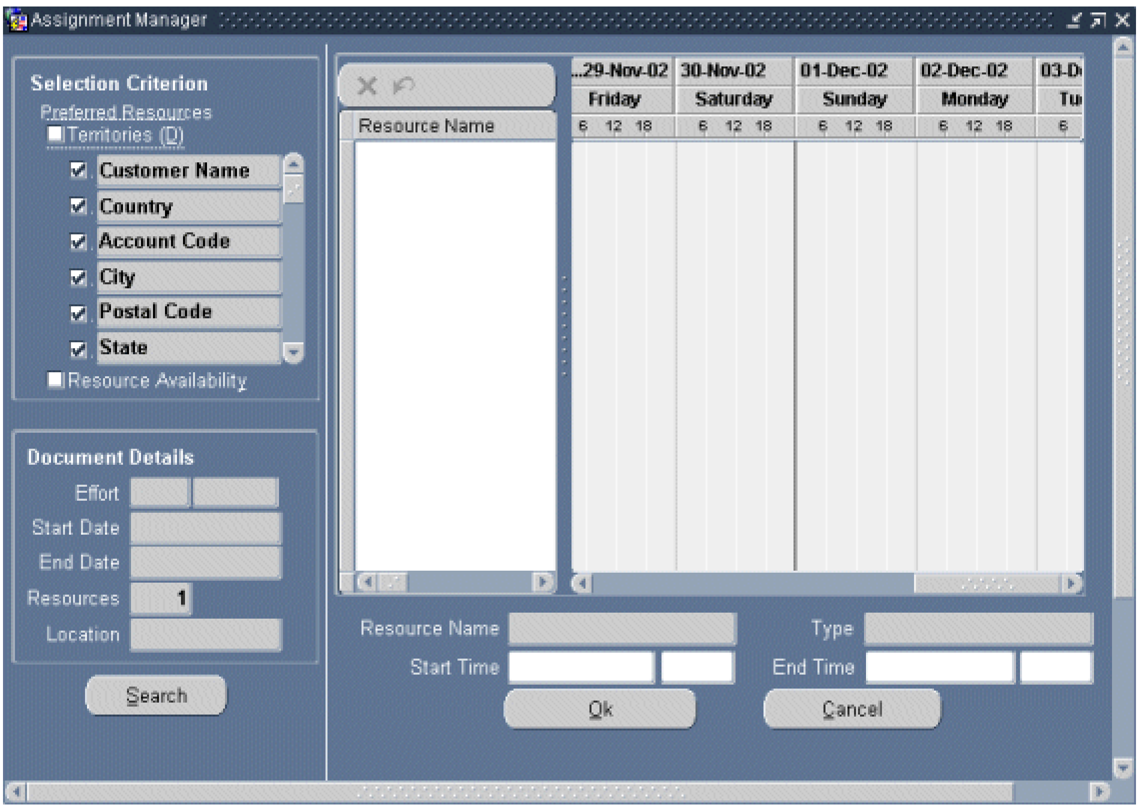
Figure 14–3 Default Service Request Task Screen



Since the Assisted Mode and Unassisted Mode radio buttons are not required by the Service Request application, you can modify the table JTF_AM_SCREEN_SETUPS_B to render the Assignment Manager UI without these features. The following SQL script customizes the Assignment Manager UI in this manner:

```
UPDATE jtf_am_screen_setups_b
SET     mode_unassist            = 'N'
      ,last_updated_by          = 123 -- userid of user who is updating
      ,last_update_date         = SYSDATE
      ,object_version_number= object_version_number + 1
WHERE  document_type = 'SR_TASK'
```

Figure 14–4   Customized Service Request Task Screen

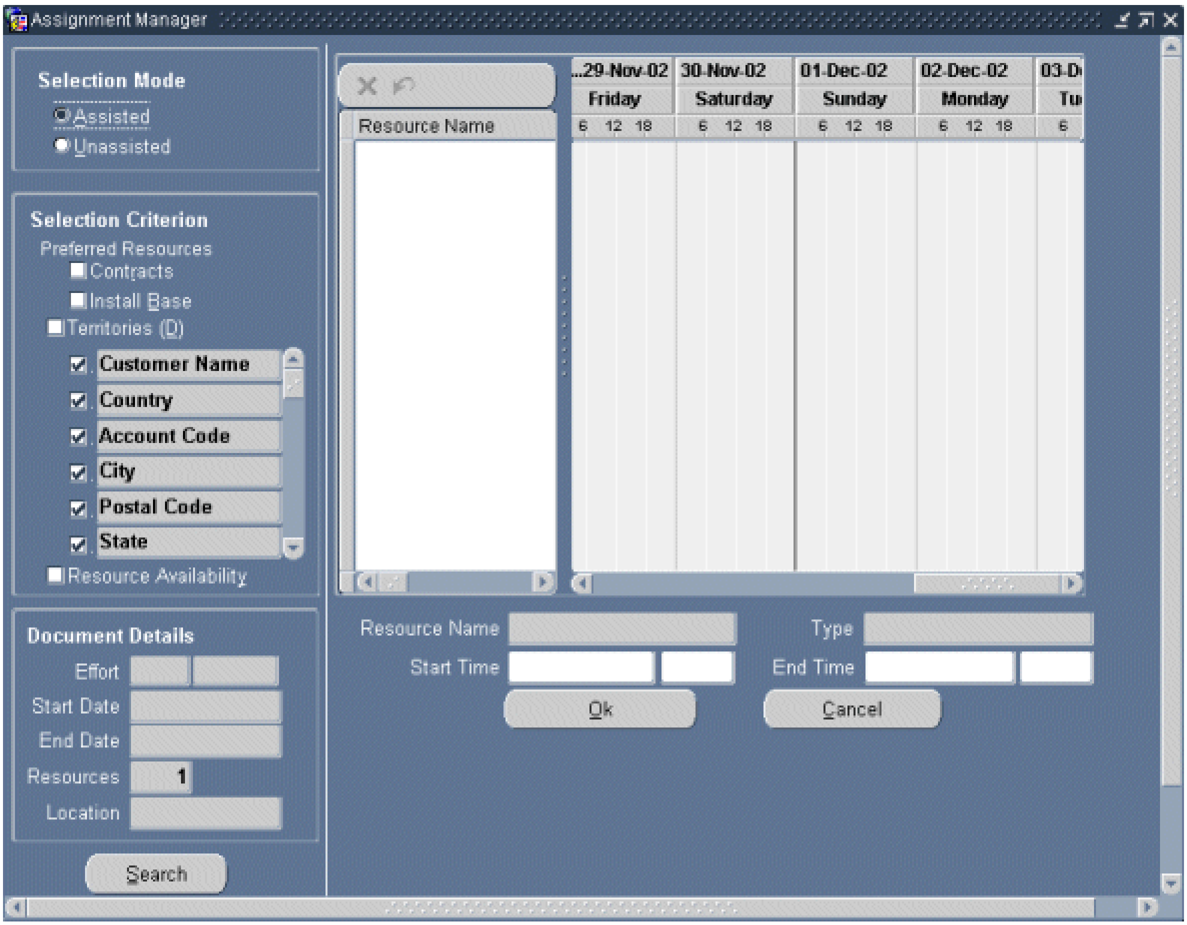


14.5.5.3 Escalations UI

When the calling document is an Escalation, the default Assignment Manager UI includes the Assisted Mode and Unassisted Mode radio buttons, the Start Time and

End Time fields, selection criteria for Contracts, Install Base, Territories, and Resource Availability as well as the Document Details fields.

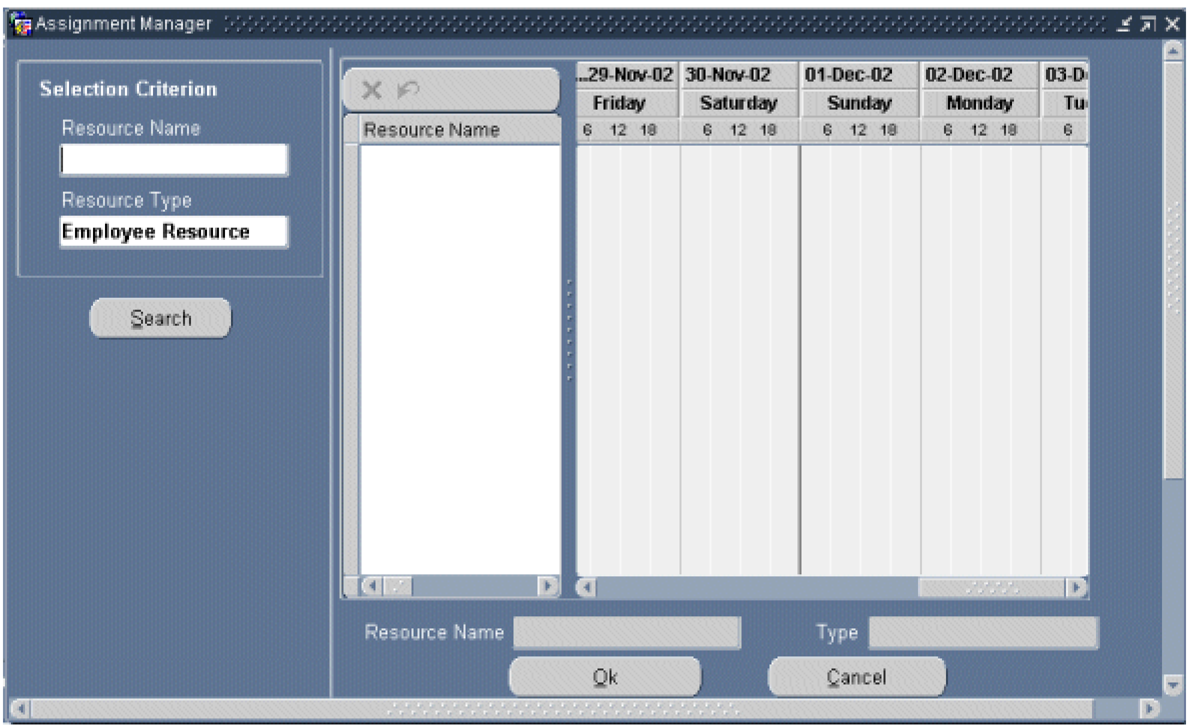
Figure 14–5 Default Escalations Screen



Since the Assisted Mode and Unassisted Mode radio buttons, the Start Time and End Time fields, selection criteria for Contracts, Install Base, Territories, and Resource Availability as well as the Document Details fields are not required by the Escalations application, you can modify the table JTF_AM_SCREEN_SETUPS_B to render the Assignment Manager UI without these features. The following SQL script customizes the Assignment Manager UI in this manner:

```
UPDATE jtf_am_screen_setups_b
SET     mode_assist                = 'N'
,contracts    = 'N'
,installed_base    = 'N'
,territory    = 'N'
,availability    = 'N'
,show_selected_time    = 'N'
,doc_details    = 'N'
      ,last_updated_by          = 123 -- userid of user who is updating
      ,last_update_date         = SYSDATE
      ,object_version_number= object_version_number + 1
WHERE  document_type = 'ESC'
```

Figure 14–6   Customized Escalations Screen



14.5.6 Backward Compatibility

For any document type not defined in the table JTF_AM_SCREEN_SETUPS_B, Assignment Manager uses its default values. A calling document can insert data into JTF_AM_SCREEN_SETUPS_B without altering the Assignment Manager UI, if it inserts the default values into the appropriate columns. For example, if the calling document inserts a new document type called DEFAULT_EXAMPLE into JTF_AM_SCREEN_SETUPS_B that retains the default UI settings, then the columns will contain the following values:

Table 14–18 Backward Compatibility Data Example: JTF_AM_SCREEN_SETUPS_B

Column Name	Column Value	Description
SCREEN_SETUP_ID	1001	Specifies a unique screen setup ID.
DOCUMENT_TYPE	DEFAULT_EXAMPLE	The name of the new document type that contains the default Assignment Manager UI values.
MODE_ASSIST	Y	Retains the Assisted Mode radio button.
MODE_UNASSIST	Y	Retains the Unassisted Mode radio button.
CONTRACTS	Y	Retains the Contracts checkbox
INSTALLED_BASE	Y	Retains the Install Base checkbox
TERRITORY	Y	Retains the Territories checkbox
AVAILABILITY	Y	Retains the Resource Availability checkbox
DOC_DETAILS	Y	Retains the Document Details component.
WINDOW_WIDTH	7	Specifies the default window width of 7 inches.
WINDOW_HEIGHT	5	Specifies the default window height of 5 inches.
WINDOW_X_POSITION	0	Specifies no X coordinate for positioning the window.
WINDOW_Y_POSITION	0	Specifies no Y coordinate for positioning the window.
DOC_DTLS_USER_ VALUES	N	Retains the default Document Details fields by disabling the ability to add custom fields.
SHOW_SELECTED_TIME	Y	Displays the Start Time and End Time fields.

The default values for a new document type appear in the table JTF_AM_SCREEN_SETUPS_TL as follows:

Table 14–19 JTF_AM_SCREEN_SETUPS_TL Sample Data

Column Name	Column Value	Description
SCREEN_SETUP_ID	1001	Specifies a unique screen setup ID.
PREFERENCE_NAME	User's Preference Name	Specifies the user's preference name.
SOURCE_LANG	US	Specifies the source language
LANGUAGE	US	Specifies the language.

14.6 Setting Up Enhanced Planning Options

Assignment Manager enables you to configure time panning options that use the SYSDATE and TIME functions to indicate the start of a shift instead of defaulting to the task's start date. Enhanced planning options are configured using the JTFAM:Use systime for Assignments profile option which is set to Yes or No at the site level. When set to Yes, the profile option enables the SYSDATE and TIME functions to determine the start of a shift. When set to No, the profile enables the task start date and time to represent the start of a shift.

14.6.1 Examples

The following cases provide examples of setting up backward planning in Assignment Manager.

14.6.1.1 Case 1

Case 1 assumes that the current SYSDATE value is 15 Aug 2003, 10:00:00. A resource, R1 is assigned a calendar for the month August 2003, with shifts starting from 8 am to 6 pm everyday of the week.

Step 1: Assign a Resource and shift to a Calendar

Assign Resources and shifts to a calendar by performing the following:

- Create a calendar by performing the following:
- Creating a Calendar called Test Cal using the Define Calendar Form.
- Create a Shift called Test Shift using the Define Shifts Form. Shift should have working hours from Monday to Friday. Start time should be 8 am, duration 10 hours.

- Assigning the Resource R1 to the calendar Test Cal from 1st August 2003 to 30th December 2003, using the Assign Resource to Calendar form.
- Assigning Test Shift to the calendar Test Cal using the Assign Shift/Exception form.

Step 2: Assign the Resource to a Territory

Assign resource R1 to a territory where Task Priority = High. To accomplish this, navigate to Territory Manager -> Territory Administration and enter the following values:

- Territory = Service Request and Task
- Transaction Qualifier = Task Priority
- Value = High
- Resource assigned = R1

Step 3: Create the Service Request

Create Service Request SR1 with Task T1 using the Create Service Request form available with the Customer Support responsibility:

- Planned Start time for T1 = 1st Jan 2003,08:00:00
- Planned End Date = 30th Aug, 2003, 08:00:00
- Duration = 2 Hours.

Step 4: View the Results in Assignment Manager

Invoke the Assignment Manager form by clicking the icon adjacent to the Assignee filed for the Service Request Task. Ensure that the Territories check box is selected while the remaining check boxes are not selected. Assignment Manager will perform the following:

- Search for Resource R1's availability from 15 Aug 2003, 10:00:00 to 29 Aug 2003, 10:00:00.
- Display resource R1 rendering the shifts in yellow and the first available slot in green.
- Double clicking the resource will select the resource, which can be returned to the SR Task by clicking OK.
- Assignment Manager will return resource R1, from 15 Aug 2003, 10:00:00 to 15 Aug 2003, 12:00:00.

14.6.1.2 Case 2

Create a calendar and assign shifts in the same manner as Case 1, Step 1 and consider the following:

- SYSDATE = 15 Aug 2003, 10:00:00
- Resource R1 has been assigned a calendar for the month August 2003, with shifts starting from 8 am to 6 pm everyday of the week.
- R1 is assigned to a territory for Task Priority = High.
- Service Request SR1 has a Task T2. Planned Start time for T2 is 1st Aug 2003, 10:00:00and Planned End Date is 25 Aug 2003, 10:00:00 for duration = 2 Hours.

Assignment Manager will search for Resource R1's availability from 15 Aug 2003, 10:00:00 to 29 Aug 2003, 10:00:00, since the range from 29th Aug 2003, 10:00:00 - 15th Aug 2003 10:00:00 is greater than the range 25th Aug 2003, 10:00:00 - 15th Aug 2003 10:00:00.

Assignment Manager will subsequently return 15 Aug 2003, 10:00:00 to 15 Aug 2003, 12:00:00.

14.6.1.3 Case 3

Create a calendar and assign shifts in the same manner as Case 1, Step 1 and consider the following:

- SYSDATE = 15 Aug 2003, 10:00:00
- Resource R1 has been assigned a calendar for the month August 2003, with shifts starting from 8 am to 6 pm everyday of the week.
- R1 is assigned to a territory for Task Priority = High.
- Service Request SR1 has a Task T3. Planned Start time for T3 is null, Planned End Date is null and for duration = null.

Assignment Manager will search for Resource R1's availability from 15 Aug 2003, 10:00:00 to 29 Aug 2003, 10:00:00 for a duration of 1 Hour and will return 15 Aug 2003, 10:00:00 to 15 Aug 2003, 11:00:00.

15

Troubleshooting Assignment Manager

This chapter covers the following topics:

- Assignment Manager
  - Common Implementation Errors
  - Error Messages
  - Additional Tips for Assignment Manager
- Gantt
  - Troubleshooting Tips for Gantt
  - Frequently Asked Questions (FAQs)

15.1 Common Implementation Errors for Assignment Manager

In order to use the full functionality of the Assignment Manager selection criteria, Assignment Manager depends on other setup tasks outlined in the section of Setting up other dependencies.

This section contains information on some of the common implementation errors associated with implementing Assignment Manager.

15.1.1 Unable to Find Resources

Action: Use the following solutions to return resources:

- Verify If Territories Are Set Up Correctly
- Recompile JTF_SEEDED_QUAL_USGS_V View
- Delete Duplicate Qualifiers

15.1.1.1 Verify If Territories Are Set Up Correctly

1. Create new territories for your testing and have a test plan.

   For example, Which territories and resources should be returned? This will help in debugging real problems.

2. Make sure that territories are ranked correctly. Territory Manager uses rank to determine the picking order for territories.

3. Make sure that you have the correct transaction types defined for the territories. If you want a territory to be used for service request and task, then make sure you have "Service Request" and "Task" as transaction types. If a territory is used for a task created within a service request, then you need to select "Service Request and Task" as the transaction type.

4. Make sure that you have resource(s) attached to the territory.

   Rules of Territories: If there are no resources attached to a territory and the effective dates are active, then the territory will be considered a place holder territory. That is, it will not qualify as a winning territory.

   > **Note:** If you make changes to territories, make sure that you run the Generate Territory Package concurrent program to reflect the changes made to the territories.

5. Make sure that you have given the right access to resources, if you have decided to make use of the Access Type feature.

   For example: A "CA Territory" with transaction types "Service Request" and "Task". If you add a resource "John Doe" and select "Service Request" only in the Access Type field, then even if this territory qualifies for a task assignment, it will not return the resource "John Doe", since he does not have "Task" access type selected, but "Service Request" access only.

   However, if the Access Type field is left blank, then this resource is eligible for receiving both task and service request assignments. Notice that this resource will not be selected for a task assignment created within a service request because the transaction type "Service Request and Task" is not selected in the Overview tab when defining the territory.

6. Make sure that you run the Generate Territory Package concurrent program once you are satisfied with your territory setup and updates. Unless you do this, changes will not take effect.

7. Make sure to delete and re-attach the resources again to the territories that have resource roles added later in the Resource Manager after territory creation.

   For a resource attached to a territory, we store the resource-id, resource type, and role associated with that resource. However, for few of them, the role is blank (NULL), as there was no role defined in Resource Manager at the time you created the territory. But at some point later, someone added roles to these resources in Resource Manager and then the Territory stopped returning these resources as there was no corresponding record in Resource View (Join Failed). In order to fix the problem, you need to delete and re-attach the resources to the territory.

   The API will return the resource, but the role will be blank even though you may see a role in Resource Manager for that resource.

8. Make sure that TCF server is up and running by using the script - adtcfctl.sh stop/start.

15.1.1.2 Recompile JTF_SEEDED_QUAL_USGS_V View

Ask your database administrator to recompile the form where Assignment Manager is invoked if an error message FRM-92000:ORA:1403 occurs. This refreshes the view so that data could be populated in JTF_SEEDED_QUAL_USGS_V view.

15.1.1.3 Delete Duplicate Qualifiers

It is possible that all of the territory qualifiers were duplicated.

Action: Clear the duplicate Transaction Type field in the Overview tab and manually delete duplicate qualifiers. Test this action first by copying one of the existing territories and then use the following steps to delete duplicate qualifiers:

1. Log in with the CRM Administrator responsibility. Select **Territory Manager > Territory Administration** to open the Navigator window.
2. Open your territory and clear one of the duplicate transaction types in the Type field on the Overview tab.
3. Select the Transaction Qualifiers tab and manually delete one of the duplicate qualifiers.
4. Save your changes.
5. Close the Territory Details window and then re-open it.
6. Click the Transaction Qualifiers tab and see if there are still have duplicated qualifiers.

7. Repeat the previous steps for all territories.

15.1.2 Displaying Start and End Date Time Incorrectly for a Selected Resource

The Assignment Manager displays the start and end date/time incorrectly for a selected resource.

Cause: This will happen on all 11i CRM products if Oracle Inventory setup steps aren't performed properly.

Action: Use the following steps for resolution:

1. In the Task tab of the Service Requests window, select Hour in the Planned Efforts field.
2. Click the Assignment Manager icon in the Task tab of the Service Requests window to launch the Assignment Manager.
3. In the Document Details region of the Assignment Manager window, make sure that you see "HR" populates in the Duration field after the number information, such as 9 "HR" for 9 hours.

   Note: The Units of Measure (UOM) "HR" is the only value used for task assignment.

   If you do not see "HR" as the value in the Duration field, then follow the given steps to set up correct units of measure information:

   a. Log in with the Inventory Superuser responsibility. Select **Setup > Units of Measure > Units of Measure**.

   b. Choose your organization.

   c. Query for Time in the Class field.

   d. Add the following record:

      * Enter Hour-Task in the Name field.
      * Enter HR in the UOM field.
      * Enter Hour-Task in the Description field.
      * Leave the Base Unit field bank.
      * Enter Time in the Class field.

e. Save the record.

After changing the setting of UOM, use the following steps for verification:

f. In the Task tab of the Service Requests window, select Hour-Task in the Planned Efforts field.

g. Try to assign this task to a resource using Assignment Manager. In the Document Details region of the Assignment Manager window, make sure that you see "HR" populates in the Duration field after the number information.

4. Double-click the resource that you want to assign to a task.

5. Verify if the start and end date/time information are properly displayed in the Assignment Manager window as you expected.

15.1.3 Returning Individual Resources for a Group Owner

Cause: This problem can be caused by the following reasons:

- The selected group resource does not have Support group usage defined in Resource Manager.
- After selecting a group type in the Service Requests window, your cursor is not placed in the Group Owner field so that the **Assign Group** button is not enabled. Therefore, click **Assign Owner** instead to launch the Assignment Manager.

Background Analysis: When Assignment Manager tries to retrieve group or team resources, it checks the usage value (such as Support usage) set in the JTFAM: Usage for Groups and Teams profile option. Based on the value (Support usage), Assignment Manager then searches for the matched groups or teams with the same usage identified in Resource Manager. Those matched group or team resources can then be displayed in the Assignment Manager. However, if there is no Support usage specified in Resource Manager for any groups or teams, then Assignment Manager returns no group resource.

Additionally, make sure to position your cursor in the Group Owner field after selecting a group type so as to enable the **Assign Group** button. Otherwise, the **Assign Owner** is enabled if your cursor is in the Owner field. Click **Assign Group** to launch Assignment Manager to retrieve group resources.

Action: Perform the following steps to set up Support group usage in Resource Manager:

1. Log in with the CRM Administrator responsibility.

2. Select **Resource Manager > Maintain Resources > Groups** to open the Define Groups window.
3. Query up your group first.
4. Select the Usages tab.
5. Use the LOV in the Usage field and select Support for the group usage.
6. Save your information.

15.2 Error Messages for Assignment Manager

This section contains information on some of the error messages associated with implementing Assignment Manager.

15.2.1 APP-JTF-210807

APP-JTF-210807: No Resource Found. Please try again.

Cause: This error usually occurs because the territories are not set up correctly.

Action: Verify territory setup process by using the procedure outlined in the Verify If Territories Are Setup Correctly section.

15.2.2 FRM-92000:ORA:1403

FRM-92000: ORA:1403: No data found

Cause: This error occurs while invoking Assignment Manager. This may happen when data is missing from the JTF_SEEDED_QUAL_USGS_V view.

Action: Ask your database administrator to recompile the form where Assignment Manager is invoked. This refreshes the view so that data could be populated in JTF_SEEDED_QUAL_USGS_V view.

15.3 Additional Tips for Assignment Manager

1. 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.

2. If the Unassisted assignment option is selected, predefined search criteria such as preferred resources, territories, and resource availability will not be available.
3. Shift schedules displayed in the Gantt chart with yellow background are defined in the Forms-based Calendar module.
4. No end dated resources are selected in the Assignment Manager with the Unassisted and Assisted assignment options. All the resources that are displayed in the Assignment Manager are valid and active resources.

15.4 Troubleshooting Tips for Gantt

In many cases, if the Gantt chart in the Assignment Manager window does not work properly, the problem stems from an incorrect configuration of the TCF server.

Note: If patch FND.D or higher is installed, first consult **Note: 164766.1**, available on MetaLink.

15.4.1 Common Issues

In general, problems with the configuration and setup of the Gantt chart fall into the following categories. They are:

- Gantt Chart Does Not Appear
- Cannot Connect To TCF Server
- No Resources Are Visible

Resolution If you are experiencing problems with the Gantt chart, then do the following:

1. First perform the steps listed under General Advice.
2. If this does not clear up the problem, then see the individual sections for the listed problems.

WARNING: These instructions for implementing the TCF servers are NOT valid if the AOL TCF Server patch (bug # 1699404) has been installed.

This patch is owned by the Oracle Applications Object Library (AOL). Contact AOL support for issues with this patch.

15.4.2 General Advice

The following items are general suggestions to follow in troubleshooting problems relating to the Gantt chart.

1. Clear out the JInitiator jcache directory, close and restart the browser, and try again. Old, cached JAR files could be causing the problem.
2. Shut down and restart the TCF server. If a patch is applied, then the new code is not picked up by the runtime engine until the TCF server is restarted.
3. Check the JInitiator Console Window for exceptions or informational messages. You can activate the Console Window by selecting the "Show Console" check box in the JInitiator Control Panel. You must then close and restart the browser.
4. Ensure that there are no invalid objects in the database. You can use the adadmin utility for this purpose.
5. If an invalid object is found, correct the problem, then make sure that the offending form is recompiled (along with its libraries). This can be done through the adadmin utility.
6. If problems continue, then perform the steps listed in the following sections as appropriate:
   - Gantt Chart Does Not Appear
   - Cannot Connect To TCF Server
   - No Resources Are Visible

15.4.3 Gantt Chart Does Not Appear

One of the most common problems is that a Form does not display the Gantt chart properly. One, or both, of the following symptoms can occur:

1. The Form displays an empty blue or gray area where the Gantt chart should reside.

2. The JInitiator console window throws a ClassNotFoundException, referring to classes in oracle.apps.jtf.gantt.

Causes The following are some of the possible causes for this condition:

1. The jtfgantt.jar file has not been downloaded onto the client machine. The JInitiator console window **must** include a line similar to the following:

   ```
   Opening http://<serverHost>/OA_JAVA/oracle/apps/jtf/jar/jtfgantt.jar no
   proxy
   ```

   It should **not** read:

   ```
   Unable to contact http://<serverHost>/OA_JAVA/<some path>/jtfgantt.jar
   ```

2. Class files are missing from jtfgantt.jar or fndlist.jar.
3. An old version of jtfgantt.jar resides in the JInitiator jcache directory.
4. The appsweb.cfg file is customized and does not include an entry for /OA_JAVA/oracle/apps/jtf/jar/jtfgantt.jar.
5. The appsbase.html file, or the HTML page used to launch applications, is customized and does not pick up the archive tag from appsweb.cfg.

15.4.3.1 Actions to Take

1. Clear out the JInitiator jcache directory on the client and restart browser.
2. Verify that jtfgantt.lst is included in fndlist.jar.
   a. First take a copy of fndlist.jar, then rename it to fndlist.zip, and use Win Zip to open the file.
   b. Verify that jtfgantt.lst in fndlist.jar lists approximately 26 class files.
3. Perform the actions described in step 2, but for jtfgantt.jar and verify that it contains the files listed in jtfgantt.lst.
4. Ensure that the JInitiator console window does not list any class files as being individually downloaded.

   If this is the case something is wrong in the installation. Class files should be downloaded within JAR files and nowhere else.
5. If Actions 2 through 5 do not verify properly, then perform the following additional actions:
   a. Force the regeneration of the FND and JTF JAR files through the adadmin utility.

b. Restart the Forms (web) listener and the Forms server. Clear out the JInitiator cache directory, and restart the browser.

c. Try Actions 2 through 5 again.

6. **Critical!** Verify that all high priority FND (AOL) patches as listed in Metalink are applied.

7. For the items listed as 4 and 5 in this section, launch the applications. In Netscape Navigator, select "View Source" and verify that /OA_JAVA/oracle/apps/jtf/jar/jtfgantt.jar is included in the archive tag.

   If it is not included, then add the entry to files appsweb.cfg and appsbase.html.

15.4.4 Cannot Connect to TCF Server

> **Note:** If you are unable to establish a TCF connection, then a generic TCF setup problem could exist. Contact your System Administrator or Oracle Support representative to resolve the issue. Until this issue is resolved, Gantt will not work properly.

There are several different errors that you could encounter when attempting to connect to the TCF server, and several different reasons each error could occur.

In general, there are three basic types of errors that can affect server connection:

- The client application is unable to connect to the TCF server.
- The TCF server is unable to connect to the database.
- The application hangs upon connecting to the TCF server.

Each type of error is discussed in the following sections.

Unable to Connect to the TCF Server The standard error message for this is:

"The application was unable to establish a network connection with the TCF SocketServer listening on port: <port> on host: <host>. Contact your system administrator."

The exact message may vary slightly between versions and products.

You may also see the following:

"Unable to connect to dispatcher."

Items to check:

- Was the TCF server ever started?

  The system administrator should be able to check if the process is running.

- What host and port names were used to start the server?

  Verify that the profiles TCF:HOST and TCF:PORT on the client point to the TCF server to which you are trying to connect. The best way to check them is to use the **Help > Diagnostics > Examine** utility to check profiles just before launching the TCF application. Verify the user-level profiles, also, as well as the site-level profile options. See Step 4b: Verify the TCF Host Name and Port Number for details of this process.

- Is the TCF server host machine accessible from the client?

  Open a TELNET to the host to see if it is reachable.

15.4.5 Unable to Connect to the Database

The standard error message for this is:

"The TCF SocketServer running at <host>:<port> was unable to make a JDBC connection to database <dbname>. This may reflect heavy load on the system, or a problem with the indicated database. If this problem persists, contact your system administrator."

You may also see the following:

"Unable to set context."

Items to check:

- Is there a ClassNotFoundException or OutOfMemoryError raised?

  Check the server logs to see if either of these errors occurred. Sometimes a ClassNotFoundException or a OutOfMemoryError is raised while the server is attempting to connect will result in this error. The former are usually configuration issues, the latter suggests that it is advisable to start your TCF server with more memory.

- Is the database actually up and running?

  Try connecting from SQL*Plus to verify.

- Are you connecting using DBC files?

For release 11.5 versions and above, it is now required that DBC files be used to connect to the database. The TCF server must be started with a new argument "DBC=", pointing to a .dbc file that should be located under $FND_TOP/secure. This command should read:

```
jre oracle.apps.fnd.tcf.SocketServer <port#> DBC=$FND_TOP/secure/xxx.dbc
```

It is important that the path to the .dbc file be specified. Because the TCF server can connect to multiple databases, it does not depend on the specific .dbc file you pass in, rather it relies on the path where those .dbc files are located to look up multiple .dbc files.

If the TCF server is not started with the DBC argument or it cannot find the .dbc file in the specified directory, this type of error might occur. Remember that the TCF server could be looking for a different .dbc file than that with which you started it. Check the server logs and see if it reports any errors while trying to load the .dbc file.

- Are the .dbc files properly formatted?

  A similar type of error can also occur if the .dbc file was improperly formatted.

  A very common error to see on the server when this happens is:

```
ld.so.1: ... libocijdbc8.so: open failed: No such file or directory
(libocijdbc8.so)
```

  This indicates that the server is attempting to use the THICK JDBC drivers to connect to the database, which is not supported. Verify that the .dbc file specifies that the THIN drivers be used. The .dbc file must contain the line:

```
APPS_JDBC_DRIVER_TYPE=THIN
```

  The .dbc file also needs to contain the following variables that identify the database to use:

```
DB_HOST=
DB_PORT=
DB_NAME=
```

  These variables correspond to the database information in the tnsnames files. The THIN drivers cannot use the TWO_TASK to resolve the database name, you must provide this information explicitly. (The DB_NAME is actually optional if the TWO_TASK variable and database SID are the same, but it's good practice to use it, in any case.)

15.4.6 Application Hangs Upon Connecting to the TCF Server

Try connecting using the ServerControl class if hanging problems are reported. If it still hangs, then typically this indicates one of the following:

1. There is a bug in the code, or that there is an environment setup problem.

   Check the debug output on the server to see if there is anything obvious that needs to be corrected, and check the bug database to see if this type of problem has been previously reported.

2. The wrong protocol was used to establish the connection.

   Ensure the TCF server is speaking the same protocol as the client. Supported protocols are SOCKETS, HTTP, and SSL. The client must use the same protocol as the Forms server.

3. The TCF server attempts to exit the loop in which it accepts connections from the client, but does not really do so.

   This type of error is probably the most common. In release 11.5.2 and beyond, if the TCF server stops accepting connections from the client, then it closes the socket and exits immediately.

   Unfortunately, this does not explain why the TCF server stopped accepting connections in the first place. Determining the reason is a more involved process. One very possible reason is the TCF server ran out of memory. The most useful thing to do in this case is to check the debug output and see if any errors are logged.

15.4.7 No Resources Are Visible

If you experience problems with the proper display of resources in the Gantt chart, then perform the steps listed in the following table.

Table 15–1 Trouble Shooting the TCF Server

Tip	Description
View the JInitiator console window error messages.	View the JInitiator console window error messages and the exceptions thrown.
Consult the TCF server log file.	View the TCF server log file for relevant information.
Verify the TCF server status.	Use the ServerControl class to check whether or not the TCF server is accepting connections on the host and port on which it was started.

15.4.8 View the JInitiator Console Window Error Messages

The single most useful thing that you can do to do to troubleshoot server problems is check the JInitiator Console window on the client machine. Some debug information is output by default, and errors raised here are often very descriptive and give a good indication of what the problem is.

If that window is no longer available, then restart the browser, set the "Show Console" check box in the JInitiator control panel, and restart the application.

The following listed items are a few of the exceptions that can be thrown, and reported in the JInitiator Console window.

1. **java.net.ConnectException: Connection refused**

   Usually this means that the TCF server is not running, or that the TCF:HOST / TCF:PORT profile options are pointing to a wrong server or port.

2. **Gantt TCF HOST:<http://hostname> PORT:<port#>**

   This refers to the TCF:HOST/PORT settings passed into the Gantt chart.

   As described in Step 4b: Verify the TCF Host Name and Port Number:

   - If the host name is prefixed with "http://", then the client attempts to connect to the TCF server using the HTTP protocol.
   - If this prefix is missing, then the client attempts to contact the server using the SOCKETS protocol.

   WARNING: If the TCF server and client do not use the same mode, then the client cannot establish a connection.

3. **gantt: tcfSetAppsContext <filename>.dbc**

   The <filename> listed in the error must exactly match the filename that was specified in the DBC parameter when starting the TCF server. If this is not the case, then rename the file to match that specified in the DBC parameter.

4. **java.lang.ClassNotFoundException:javax.net.ssl.SSLSocket**

   The client side SSL libraries are meant to be included with JInitiator. However, in some older versions of JInitiator, this did not happen due to US export restrictions that have since been lifted.

If this exception occurs, then you must install the latest version of JInitiator (1.1.7.32 or higher). If necessary, contact Oracle Support for help with this step.

5. **java.io.EOFException**
   .... < 3-5 lines of text> at
   oracle.apps.fnd.tcf.net.SocketServerConnection.readBigUTF(
   SocketServerConnection.java)

   This exception usually occurs after the client tries to connect to the TCF server using the wrong communication protocol. The message indicates that the TCF:HOST profile is not set correctly. Refer to Step 4b: Verify the TCF Host Name and Port Number for details.

6. **gantt: addbar failed, resource not found (<Resource Type> - <Resource Id>)**

   One common cause for this exception is described in bug 1414546, which is dependant on the Forms-based Calendar bug 1415863 for resolution. If this is the case, then ensure that the resource does not have a Calendar Exception assigned that spans the entire duration of a shift.

7. **java.net.UnknownHostException: <host>**

   This exception is thrown when the TCF:HOST profile is set to a server that is not recognized by the client.

   Verify that the TCF:HOST profile is set correctly, and that the client machine can access the server using the <host> displayed in the exception.

   One way to check is to open a DOS window (on a Microsoft Windows machine) and type in "ping <host>." If the host is inaccessible from the client, then the response returns a "Bad IP address <host>" message.

15.4.9 Consult the TCF Server Log

You can view the TCF server log to obtain further information. To set up the log file for automatic logging, perform the following steps:

1. Add the following to the command line:

   ```
   OUTPUTFILE=/tmp/<logfile>.log LOGLEVEL=STATEMENT
   ```

2. Bounce (stop and restart) the TCF server.
3. Run the application again.
4. Check the log file to see if there is anything in the log file that may indicate what the problem may be.

Errors of the following type can be due to bug 1510941. View the AIX Port Instructions, in the Step 2: Performing the Post Install Steps section for details on how to correct this problem.

```
java.lang.NullPointerException
at oracle.jdbc.oracore.OracleTypeNUMBER.unpicklerec(Compiled Code)
at oracle.jdbc.oracore.OracleType.unpicklerec(Compiled Code)
at oracle.jdbc.oracore.OracleTypeCOLLECTION.unpicklerec(Compiled Code
at oracle.jdbc.oracore.OracleTypeCOLLECTION.unpickle(Compiled Code)
at oracle.jdbc.oracore.OracleTypeCOLLECTION.unpickle(Compiled Code)
at oracle.jdbc.oracore.OracleTypeADT.unlinearize(Compiled Code)
at oracle.sql.ArrayDescriptor.length(Compiled Code)
at oracle.sql.ARRAY.length(Compiled Code)
at oracle.sql.ARRAY.getArray(Compiled Code)
at oracle.apps.jtf.gantt.server.GanttDataServer.getShifts
```

15.4.10 Verify the TCF Server Status

You can also use the ServerControl class to check whether or not the TCF server is accepting connections on the host and port on which it was started.

To do this, log onto the machine where it was started and run:

```
jre oracle.apps.fnd.tcf.ServerControl STATUS <port#>
```

One of the following can occur:

- If the result is some variant of "Unable to connect," the server most likely was not started properly. See: Cannot Connect To TCF Server and Unable to Connect to the Database for details of how to solve this problem.
- If the application hangs upon connecting, the server has stopped accepting connections for some reason and must be bounced. See Application Hangs Upon Connecting to the TCF Server.
- If you are able to connect from the ServerControl but not from an application, it might be an application-specific problem, or it may be that the client JAR files are not set up correctly.

15.4.11 TCF Server and Forms Server Mode

Make sure the TCF Server and Forms Server runs in the same mode (Socket or Http) to get the Gantt and Assignment Manager to work properly.

Resolution:

To check what modes they are running in check the following files in the $COMMON_TOP/admin/scripts:

adtcfctl.sh for TCF Server

adfmsctl.sh for Forms Server (The Forms Server should run in the mode that is defined in appsweb.cfg)

Note: Remember to bounce the Apache Server after changes are made for the changes to take effect.

15.5 Frequently Asked Questions (FAQs)

The following are frequently asked questions. Answers to these questions may help you in troubleshooting problems with TCF Server.

15.5.1 How to Check the Status of the TCF Server?

Answer: Execute the script 'adtcfctl.sh status' or use the server control class to check jre oracle.apps.fnd.tcf.ServerControl STATUS

15.5.2 How Do I Start or Stop the TCF Server?

If TCF Server is not running it could be the reason the Assignment Manager will not function properly

Action: In Unix under $OAH_TOP/admin/script execute adtcfctl.sh stop/start.

Checking the TCF:HOST and TCF:PORT profile options

What type of values should they contain?

Resolution:

a. If connectMode=http, set profile option TCF:Host to 'http://.' TCF:Host http://:/oa_servlets TCF:HOST is automatically updated to the same value as the APPS_SERVLET_AGENT Profile option. If the APPS_SERVLET_AGENT profile contained a value ending with the virtual directory OA_HTML, it should end with the name of a valid servlet zone.

b. If connectMode=socket, set profile option TCF:Host to just '.' -- omit 'http://'

c. Make sure that the profile option value of TCF:Port is the port that the TCF Socket Server is listening on. TCF:PORT -1.

Part VI

Task Manager

This part of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Setting Up Task Manager
- Working with Task Templates
- Customizing HTML Tasks Security
- Troubleshooting Task Manager

16 Implementation Overview

This chapter provides an overview of the Task Manager implementation process.

16.1 Overview

Task Manager provides an effective mechanism for organizations to create tasks, assign resources to tasks, schedule tasks, and manage tasks, as well as to track task assignments.

Depending on your business needs, Task Manager can be used as a stand-alone module to create personal tasks and private to-dos, or it can be integrated with other applications in the e-Business Suite to create context sensitive tasks, such as tasks created for a sales opportunity. No matter how Task Manager is used, the implementation steps for Tasks would be the same.

In general, to implement Task Manager, the implementor or system administrator need to set up basic task components, such as task types, priorities, statuses, reference mapping, date types, profile options, concurrent programs, and metadata objects if necessary. If task templates or task template groups will be used later in the application, then the implementor can create them first so that users can have an option to create multiple tasks simultaneously. In addition, Task Manager allows implementor or system administrator to further customize the task security rules so that appropriate users can be authorized with right access privileges to particular tasks.

Before implementing Task Manager, it is necessary to understand the following concepts:

- Setup Dependencies
- Forms-based and HTML Versions of Task Manager

16.1.1 Setup Dependencies

To be able to use the full functionality of Task Manager, the following components must be set up properly:

- **Trading Community Architecture (TCA)**. Use TCA to locate the customer contact information when creating a task against a customer.
- **Oracle Workflow**. Use Oracle Workflow to send workflow notifications in order to notify personnel about task creation and changes.
- **Notes**. Use Notes to add additional information attached to a task.
- **Resource Manager**. Use Resource Manager to locate resources (task owner and assignee) for a task.
- **HTML Calendar**. Use HTML Calendar to define personal preferences for tasks including task category and other calendar preferences.
- **Escalation Manager**. Use Escalation Manager to escalate a task created in the Forms-based Task Manager.
- **Assignment Manager**. Use Assignment Manager to assist in locating the qualified resources (task owner and assignee) for a task created in the Forms-based Task Manager.

16.1.2 Forms-based and HTML Versions of Task Manager

Task Manager was initially a Forms-based application, and was subsequently expanded to include an HTML version. A number of features are available in both versions; however, some features are available in only Forms or HTML. As a result, most of implementation steps for each version are nearly identical and performed in Forms. Additional steps that apply only to Forms or HTML version are discussed in the next section.

16.2 Steps

This section provides an overview of the required steps for implementing Task Manager including setting up basic task components, defining task templates, customizing HTML Task security, and troubleshooting Task Manager. Detailed instructions for these steps are contained in the subsequent chapters.

- Setting Up Task Manager
  - Defining Task Types

- Defining Task Status and Status Transition Rules
- Defining Task Priorities
- Defining Task Date Types (Forms only)
- Defining Task and Notes Reference Mapping (HTML only)
- Registering Mass Task Reassignment Window (HTML only)
- Setting Profile Options
- Running the Task Manager Concurrent Program
- Setting Up Metadata Objects

- Working with Task Templates (Forms only)
- Customizing HTML Task Data Security (HTML only)
- Troubleshooting Task Manager

16.2.1 Setting Up Task Manager

This chapter provides instructions for setting up essential task elements in the following topics:

16.2.1.1 Defining Task Types

In addition to the seeded task types, the implementor or system administrator can create new task types to specify the purpose of a task creation, such as a Follow-up task or an Appointment task. They can also map task types to a source object or a specific resource category. This way, users will see the task types that are mapped to the source object from the Task Type list of values when creating a task.

16.2.1.2 Defining Task Statuses and Status Transition Rules

The implementor or system administrator can create new task statuses to specify the progress of a task, such as Complete, or Work. In addition, to regulate task status change, the implementor or administrator can also set the status change rules and define appropriate rule access through responsibilities.

16.2.1.3 Defining Task Priorities

The implementor or system administrator can create additional task priorities to determine an importance rating for a task, such as Low, High, and Critical. In addition, like task types, task priorities can be mapped to a source object. This allows users to see only the task priorities that are mapped to the source object from the Task Priority list of values when creating a task.

16.2.1.4 Defining Task Date Types (Forms only)

In addition to the planned, scheduled, and actual dates, the implementor or system administrator can create new date types for users to track task progress, such as setting a date for a major milestone (like task creation, or completion). Date Types can also be mapped to a source object.

Users can see the additional date types shown in the list of values only in the Dates tab of the Forms-based Task Details window.

16.2.1.5 Defining Task and Notes Reference Mapping (HTML only)

The implementor or system administrator can map reference types to a source object, such as Task Manager. This limits the selection of Reference Type list of values shown in the HTML Task Manager.

16.2.1.6 Registering Mass Task Reassignment Window (HTML only)

The functionality for performing mass reassign tasks is only available in the HTML Task Manager. Therefore, the implementor or system administrator must register the Task Mass Reassignment window in business flows if the HTML Task Manager is used.

16.2.1.7 Setting Profile Option

The implementor or system administrator must set necessary profile options used in Task Manager to set default values for task status, priority, types, as well as owner and assignee statuses. Other profile options determine the client time zone, unit of measure, data truncation, and task security access.

16.2.1.8 Running the Concurrent Program

In order to retrieve new and updated tasks from quick find search, the system administrator must run the Rebuilding Intermedia Index for Task Names concurrent program periodically.

16.2.1.9 Setting Up Metadata Objects

The implementor or system administrator can add additional data in the JTF objects table if necessary. For example, if a document (such as Service Request) is newly defined or integrated with Task Manager, then the new document must be associated with Tasks usage.

16.2.2 Working with Task Templates (Forms only)

The Forms-based Task Manager allows implementor or system administrator to create task templates or task template groups. Instead of creating tasks individually, users can have an option to create multiple tasks simultaneously based on a selected template or template group.

16.2.3 Customizing HTML Task Data Security

With the continuous support of the existing task security rules, HTML Task Manager leverages the Application Object Library (AOL) data security model to provide a flexible mechanism for task security access. The new security model allows the implementor or system administrator to customize task data, and then grant specific tasks to appropriate users or user groups with right access privileges. It includes customizing contextual task rules by using a profile option, building security around resource list of values, and allowing group managers to access his or her direct's tasks.

This functionality only applies to the HTML Tasks, not the Forms-based Tasks.

16.2.4 Troubleshooting Task Manager

The troubleshooting chapter includes common implementation errors and frequently asked questions (FAQs) for implementing Task Manager.

17

Setting Up Task Manager

This chapter covers the following topics:

- Defining Task Types
- Defining Task Statuses and Status Transition Rules
- Defining Task Priorities
- Defining Task Date Types
- Defining Task and Notes Reference Mapping
- Registering Mass Task Reassignment Window
- Setting Profile Options
- Running the Task Manager Concurrent Program
- Setting Up Metadata Objects

17.1 Defining Task Types

In addition to seeded task types, the system administrator can define new task types in the Forms-based Task module.

The section covers the following topics:

- Defining Task Types
- Mapping Task Types to A Source Object
- Associating Task Types to Resources
- Enabling Task Workflows

17.1.1 Defining Task Types

Task types are used to further classify tasks. For example, a task can be created relating to a meeting regarding a service request. It can be a follow-up task for a sales or a marketing campaign or a callback to an existing customer. The “Meeting,” “Follow up action,” and “Callback” can be the task type used to categorize similar tasks with the same creation purposes.

After specifying the task type name, description, effective dates, unit of measure, and duration effort, the administrator can also specify appropriate type flags for the new types.

Table 17–1 Task Type Flag Definitions

Flag	Description/Action
Notification	This flag launches the notification workflow automatically if the auto notification check box is selected in forms, or the Notify check box is selected in HTML.
Schedulable	This flag reserves the resource through the Scheduler.
Private	This flag is reserved for future use.
Seeded	This flag is seeded task type and is not editable.

Please note that the Private task flag in the Forms-based version of Task Manager is not supported at this time. This functionality will be removed in a future release. The new HTML-based Task Manager does support both Private and Public tasks.

Task Rules

WARNING: Do not try to define new task rules. Task type rules that are available in the system (Field Service and Oracle Marketing) are the only rules that can be used in Task Manager.

You can modify or delete items that you created, but not those that are seeded.

17.1.2 Mapping Task Types to A Source Object

Use the task type mapping functionality to map task types to a source object. This limits the visibility of task types shown in the task type list of values for a mapped source object. After mapping types to a source, you will see only the mapped task types displayed in the list of values. All other unmapped types will not be in the list.

For example, after mapping task types to an object, you can only see the task types that are mapped to your source object displayed in the list of values. Any unmapped task types to your source object are now dynamically excluded from the lists. In addition, if none of the types is mapped to your source object, then you will see all task types from the list of values. Therefore, any user-defined task types need to be mapped to your source object. Otherwise, you will not see them from the list after defining them.

17.1.3 Associating Task Types to Resources

After defining your new task type, use the Resource Requirements window to associate a specific resource requirement that is necessary to complete a task with the specified task type.

For example, you can associate employee resources with task type "CallBack". As a result, when assigning a task with type "CallBack", you will only see employee resources from the resources list of values.

17.1.4 Enabling Task Workflows

Task Manager contains one pre-defined workflow, JTFTASK, which is used to send workflow notifications automatically to notify personnel about task creation and changes. This workflow can also send notifications to employee resources, groups, and teams. If you do not want to use the default workflow process, you can define a new workflow for Task Manager by using Oracle Workflow.

JTFTASK is automatically launched under the following circumstances:

- In HTML, the preferences are set to Yes in the Issue Notification drop-down list.
- The Task Type Notification flag is set to Y (Yes).
- The Auto Notification flag in the Task window is set to Y (Yes).
- Task creations or updates use the task type with the Notification flag checked.

By turning on or off the Notification flag for each task type in the Task Types window, you can control whether or not tasks of that task type should launch a workflow process automatically. For more information, see Starting Workflow Processes.

If workflow fails to launch automatically, verify that both the task **Auto Notification** check box in the Tasks window and the **Notification** check box in the Task Types window are selected. If you do not set the workflow process, notifications are not sent. The workflow is set using the standard applications concurrent manager.

> **Note:** For more information on setting up Oracle Workflow, see the *Oracle Workflow Administrator's Guide 2.5.*

Perform the following steps to define a new task type.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Setup > Task Types**.

Steps

1. Select **File > New**.
2. In the Task Types window, enter a name for the new task type.
3. Select from the list of values (LOV) in the Workflow field. This field is used to assign the workflow process to a task.

   The corresponding workflow process information populates the Task Workflow and Description fields. If you do not want to use the default process, you can define a new workflow process for JTFTASK using Oracle Workflow.
4. You can associate a task type with a seeded task rule but you cannot define new rule. You can only use seeded task rules in Task Manager.
5. Enter the effective dates in the From and To fields.

   The Effective To field is read-only for seeded task types. This field is only active if you are defining a new task type.
6. Select a unit of measurement for effort from the UOM LOV. Options include day, hour, minute, month, week, and year.

   Use a measure of time to determine the UOM value.
7. Enter a number for the quantity of effort in the Qty field.

8. Select task type flags.
9. Select the Notification check box if you want notifications to be sent automatically when a task is created with the new task type.

Mapping Task Types to A Source Object

10. If you want the new task type to appear in the task type LOV for a specific source object, you must map the task type to that source.
    a. Click **Map Types** in the Task Types window.

       The Mapping Objects window opens.
    b. Select the source object from the list of values (LOV), for example, appointment.
    c. Select the task type from the LOV, for example, critical.
    d. Select the end date from the LOV.
    e. Select the application from the LOV, for example, FND, Application Object Library.
    f. The **Seeded** check box is not editable.
    g. Click **Save**.

Associating Task Types to A Resource Type

11. In the Task Types window, select the newly created task type and click **Resource Requirement**.

    The Resource Requirements window opens.
12. Select a resource type from the list of values (LOV).
13. Enter the number of resources needed in the Required Units field.

    Selecting the Enabled Flag activates the resource type for the corresponding task type.
14. Click **OK**.

    The required resource information is saved with the task type and appears in the corresponding LOV in the user interface (UI) if enabled.
15. Save your task type.

See Also

- Defining Task Statuses and Status Transition Rules

- Defining Task Priorities
- Defining Task Date Types
- Designing Task Templates
- Defining Template Details
- Setting Up Metadata Objects
- Defining Task and Notes Reference Mapping
- Setting Profile Options
- Running the Task Manager Concurrent Program

17.2 Defining Task Statuses and Status Transition Rules

Use the Forms-based Task Manager to define task statuses and status transition rules. Task statuses are used to define the progress of tasks, such as open, working, and completed. To be able to regulate task status change, Task Manager uses the Status Transition window to set the status change rules and to define appropriate rule for a specific application access through responsibilities. After defining the status transition rule, the implementor or system administrator must associate the profile option "Task Manager: Default Task Status" with the status transition rule. As a result, the default task status will match the status rule for a specific application.

The section covers the following topics:

- Defining Task Statues
- Defining Task Status Transition Rules
- Link the Profile Option "Task Manager: Default Task Status" to the Status Transition Rules

17.2.1 Defining Task Statuses

In addition to the seeded task statuses, the system administrator can use the Forms-based Task Manager to define new task statuses for specific business needs.

After specifying the status name, description, effective dates, and status usage for Task, not Escalation, the administrator also needs to identify appropriate status flags for the new task status.

Please note that all seeded task statuses cannot be updated.

Table 17–2 Task Status Flag Definitions

Flag	Description
Assignment Status	The status is displayed in the Assignment Status field.
Task Status	The status is displayed in the Task Status field.
Assigned	The task is assigned to a resource.
Working	The task is in progress.
Schedulable	The task can be used through Scheduler.
Accepted	The task is accepted.
Rejected	The task is rejected.
On Hold	The task is currently not active.
Approved	The task is approved.
Completed	The task is completed.
Cancelled	The task is cancelled.
Delete Allowed	The task can be deleted without cancellation.
Closed	The task is completed and closed.
Seeded	The task status is pre-defined and cannot be updated.

Note: Refer to the Setting Escalation Status section for information regarding Escalation Manager.

17.2.2 Defining Status Transition Rules

Use task status transition rules to define the possible task status change rule for a task, as well as to define appropriate access to the rule through responsibilities.

For example, an open task (Open Status) can be assigned to a resource (Assigned Status) and then the assigned task can be closed (Closed Status) once the task is completed. However, the open task cannot be closed without first being assigned.

As each status change sequence is identified in a status transition rule, it limits the user’s selection of task statuses that appear in the list of status options. The rule also determines the type of resource that has access to each status type.

In addition to defining the status transition rules, you can also associate rules with certain responsibilities. As a result, a manager may have more privileges than an agent to access or change certain statuses, such as approved or cancelled, if defined in your rules. Only one transition rule can be mapped to a task.

Use the following two tabs to define your status transition rules:

- **Rule tab**: Use Rule tab to define the status transition rule name, its associated application, and status transition values.

For example, Oracle Field Service uses the status transition rule to regulate the status transition for a service request. Therefore, "Service Request Rule” can be the rule name, and it is associated with the Field Service Application. In addition, identify the appropriate status for the Current Status and Next Status for the rule. The Next Status field is used to define the task status that immediately follows the task status in the Current Status field.

> **Note:** Do not confuse the status transition rule that you define here with the task type rule. The task type rule can only be associated with the task type while defining a new task type.

- **Responsibility tab**: Use Responsibility tab to associate your rules with specific responsibilities.

For example, after defining the “Service Request Rule”, you can associate it with the Field Service Dispatcher, Field Service Manager, or Customer Support responsibility. The Field Service Manager responsibility can also be associated with another transition rule if necessary. As a result, a field service manager may have more privileges than a support agent to access or change certain statuses, such as Approved or Cancelled, if defined in the rules.

17.2.3 Link the Profile Option “Task Manager: Default Task Status” to Status Transition Rules

In order for the state transitions to work, after defining the status transition rule and assigning it to the responsibility, make sure that you also set the value in the “Task Manager: Default Task Status” profile option to the initial state (the First Current State) of the rule at site, responsibility or user level.

For example, you define a rule and assign it to the CRM Administrator responsibility with the following values:

Table 17–3 Status Transition Rule Example

Current State	Next State
Open	Planning
Planning	Working
Working	Completed

You must set the "Task Manager: Default Task Status" profile option to Open, the first current state of the rule.

If there are no rules assigned to a responsibility, then all the statuses will show up in the Status list of values. In this case, the value specified in the profile option will not necessarily be the initial state of a rule.

Perform the following steps to define a new task status.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Setup > Task Status**.

Steps

Defining a New Task Status

1. Select **File > New** to enter new task status in the Task and Escalation Status window.
2. Enter a task status name.
3. Enter a brief description of the task status in the Description field.
4. Enter the effective dates in the From and To fields.

   The Effective To field is read-only for seeded statuses. This field is only active if you are defining a new task status.

5. The usage is automatically set to Task and cannot be changed. If you are defining an Escalation status, you must access the window from the Define Escalation Status link in the navigator.
6. Select appropriate task status flags.

Defining Status Transition Rules

7. In the Task and Escalation Status window, click **Define Transition**.

   The Status Transition window opens.
8. In the Rule tab, enter a name in the Rule Name field.
9. Enter appropriate application name for the rule.
10. Enter appropriate values for the current and next statuses for the rule.
11. Click the Responsibility tab to assign a rule to a responsibility and click **OK**.

Setting the Default Task Status Profile Option

12. Log in with the System Administrator responsibility, select **Profile > System**.
13. Set the Task Manager: Default Task Status profile option value to the initial status of the status transition rule, for example, Open.
14. Save your work.

See Also

- Defining Task Priorities
- Defining Task Types
- Defining Task Date Types
- Designing Task Templates
- Defining Template Details
- Setting Up Metadata Objects
- Defining Task and Notes Reference Mapping
- Setting Profile Options
- Running the Task Manager Concurrent Program

17.3 Defining Task Priorities

In addition to seeded task priorities, the system administrator can define new task priorities in the Forms-based Task module. Task priorities are used to determine an importance rating for a task. Priorities define varying levels of urgency for tasks, such as low, high, and critical.

Please note that you can modify or delete items that you created, but not those that are seeded.

Mapping Task Priorities to A Source Object

Use the task priority mapping functionality to map task priorities to a source object. This limits the visibility of task priorities shown in the task priority list of values for a mapped source object. After mapping priorities to a source, you will see only the mapped task priorities displayed in the list of values. All other unmapped priorities will not be in the list.

For example, after mapping task priorities to an object, you can only see the task priorities that are mapped to your source object displayed in the list of values. Any unmapped task priorities to your source object are now dynamically excluded from the lists. In addition, if none of the priorities is mapped to your source object, then you will see all task priorities from the list of values. Therefore, any user-defined task priorities must be mapped to your source object. Otherwise, you will not see them from the list after defining them.

Perform the following steps to define a new task priority:

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Setup > Task Priority**.

Steps

1. Select **File > New** to enter a new task priority in the Task Priority window.
2. Enter a name in the Priority field.

3. Enter a numerical value in the Importance field.
4. Enter a brief description for the priority.
5. Enter the effective dates in the From and To fields.

   The Effective To field is read-only for seeded priorities. This field is only active if you are defining a new task priority.
6. Save your task priority.

   The new task priority appears in the Priority list of values LOV in the UI.
7. To map task priorities to a source:
   a. In the Map Priority window, click **Map Priority**.

      The Mapping Objects window opens.
   b. Select the source object from the LOV, for example, appointment.
   c. Select the task priority from the LOV, for example, critical.
   d. Select the end date from the LOV.
   e. Select the application from the LOV, for example, FND, Application Object Library.

      The **Seeded** check box is not editable.
   f. Click **Save**.

See Also

- Defining Task Statuses and Status Transition Rules
- Defining Task Types
- Defining Task Date Types
- Designing Task Templates
- Defining Template Details
- Setting Up Metadata Objects
- Defining Task and Notes Reference Mapping
- Setting Profile Options
- Running the Task Manager Concurrent Program

17.4 Defining Task Date Types

In addition to the seeded date types (planned dates, scheduled dates and actual dates), you can use task date types to define other dates to track task progress, such as milestone and follow up dates. This functionality is used in the Forms-based Tasks only.

Mapping Task Date Types to A Source

You can limit the selection of the LOV shown in the Date Type field by mapping them to a source. For example, you can set the selection of date types from the LOV for a service request (source object) to be only “Due Date” and “Follow Up Date.”

Where to Use These Date Types

After defining additional date types, you can identify more date types from the LOV if clicking the Dates tab in the Task Details window in Tasks Forms.

Perform the following steps to define a task date type.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Setup > Task Date Types**.

Steps

1. In the Task Date Types window, enter the task date type.
2. Enter a description for the task date type.
3. Enter a numeric value for the Sequence.
4. Define the Application field as the application that is seeding the data, for example, FND (Application Object Library). This field is not relevant to external customers.
5. If you want to limit the selection of the LOV shown in the Date Type field by mapping the task date types to a source:

a. In the Task Types window, click **Map Date Types**.

   The Mapping Objects window opens.

b. Select the source object from the list of values (LOV), for example, appointment.

c. Select the task type from the LOV, for example, critical.

d. Optionally set the end date for the task date type.

e. Define the application field as the application that is seeding the data, for example, FND (Application Object Library). This field is not relevant to external customers.

   The **Seeded** check box is not editable.

f. Click **Save**.

See Also

- Defining Task Statuses and Status Transition Rules
- Defining Task Priorities
- Defining Task Types
- Designing Task Templates
- Defining Template Details
- Setting Up Metadata Objects
- Defining Task and Notes Reference Mapping
- Setting Profile Options
- Running the Task Manager Concurrent Program

17.5 Defining Task and Notes Reference Mapping

Use the Mapping Objects window to map a reference type to a source object. This allows you to narrow down the References drop-down list to objects that are actually relevant to a document's source object.

For example, you can map a sales lead to Task Manager (or Note Type). This limits the selection of list of values shown in the Reference Type (or Relate To) field in the HTML Task Manager (or HTML Notes) when you relate a task (or a note) to a business object. In addition, when creating a note for a Sales Opportunity, users typically don't want to see such objects as Service Request or Defect in the References drop-down list. Instead, they would only want to see Lead, Forecast, Quote, and Sale Organization. Therefore, Notes implementors can map Lead, Forecast, Quote, and Sales Organization to the source object Sales Opportunity.

Please note that new task references for the Forms-based Task Manager can be created by logging with the CRM Administrator responsibility and selecting Task and Escalation Manager > Setup > Define Reference Type. These new task references are visible from the LOV in the Type field of the References tab located in the Task Details window (Forms version).

> **Note:** This window defines reference mapping for both the Task Manager and the Notes module.

Perform the following steps in Forms to define the objects that appear in the Reference drop-down list for a specific source object.

Prerequisites

Your source object must exist.

Responsibility

CRM Administrator

Navigation

Navigate to **CRM Administrator > Task and Escalation Manager > Setup > Task & Note References**

Steps

1. In the Mapping Objects window, select your source object from the LOV, for example, Sales Opportunity.
2. Select the References you want to appear in the drop-down list from the LOV.
3. Select an end date from the LOV.
4. Select the application where you want to extract your additional data from and click **Save**.
5. Repeat these steps for every object that you want to appear in the References LOV for your source object.

See Also

- Mapping Note Types to a Source
- Setting Up Note Types
- Defining Task Statuses and Status Transition Rules
- Defining Task Priorities
- Defining Task Types
- Defining Task Date Types
- Designing Task Templates
- Defining Template Details
- Setting Profile Options
- Running the Task Manager Concurrent Program

17.6 Registering Task Mass Reassignment Screen

The Task Mass Reassignment window used to mass reassign tasks to different resources is Declarative Page Flows (DPF) enabled. It can link several pages together to represent a business flow. The Task Mass Reassignment window needs to be registered in business flows.

How to register the screen in business flows, see *Oracle Applications CRM System Administrator's Guide* for details.

17.7 Setting Profile Options

Task Manager has a number of optional profile options. You can set default statuses, priorities, dates, and types, as well as defaults for owner and assignee statuses. Other profile options determine the client time zone, unit of measure, data truncation, and workflow. Profile values must be set in the Profile Values window by a System Administrator.

The following table describes the profile options that are specific to Task Manager.

Table 17–4 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Default Task Type	No default value	Site	Use the Default Task Type profile option to set the default task type. Possible values include appointment and lead.	Set the value to the task type that you want to appear in the task type drop-down list when you are creating a task.
Task Manager: Default Task Status	Open	Site	Use the Default Task Status profile option to set the default task status. Possible values include open and completed.	Set the value to the task status that you want to appear in the task status drop-down list when you are creating a task.
Task Manager: Default Task Priority	Medium	Site	Use the Default Task Priority profile option to set the default task priority. Possible values include critical and medium.	Set the value to the task priority that you want to appear in the task priority drop-down list when you are creating a task.
Task Manager: Default Task Owner	No default value	Site	Use the Default Task Owner profile option to set the default task owner.	Set the value to the name of the default task owner.
Task Manager: Owner Type for Task	No default value	Site	Use the Owner Type for Task profile option to set the default owner type. Possible values include employee resource and party.	Set the value to the owner type for the task.
Task Manager: Default Assignee Status	Accepted	Site	Use the Default Assignee Status profile option to set the default assignee status.	Set the value to the assignee status that you want to appear in the Assign To Status drop-down list when you are creating a task.
Task Manager: JTF Tasks Default Date Selected	Scheduled	Site	Use the JTF Tasks Default Date Selected profile option to set the default date selected. Possible values include Planned, Scheduled, or Actual.	Set the value to the default date that you want to default in the Create Task window.
Task Manager: Task APIs to Determine if Security is Implemented	No default value	Site	The Task APIs to Determine if Security is Implemented profile option is reserved for future use.	The value of this profile option should always be set to No.

Table 17–4 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Time Unit of Measure Class	Time	Site	Use the Time Unit of Measure Class profile option to define the time unit of measure class in the inventory module. Depending on the time unit of measure class, you will see the list of UOM codes in the Tasks module.	Depending upon the value of this profile, the Time UOM codes are shown in the list of values. If the value of this profile changes, then there will be a discrepancy between the existing data and the new LOV shown for the new Time UOM class. Oracle strongly recommends the value of this profile should NOT be changed after the system in the production
Task Manager: View All Task Privileges	Yes	Site	The View All Task Privileges profile option is reserved for future use.	Do not change the value of this profile option.
Task Manager: Delete Any Task Privileges	No	Site	The Delete Any Task Privileges profile option is reserved for future use.	Do not change the value of this profile option.
Task Manager: Use the Indicator of Data Truncation	...	Site	Use the Indicator of Data Truncation profile option to store a three-character code which is appended to the source object name of a Task when it has been truncated. The default value of this profile option is '...'. For example, if the source of a Task is a Party, the name may be too large to store in the source_object_name column. If the name: "This is a very long name to test the truncation indicator functionality" (71 chars) is passed to the Task API as the source object name, it is written to the Task record as: "This is a very long name to test the truncation indicator..." (60 chars). The default value of this profile option is '...'.	Set the value that is appended to the source object name of a Task when it has been truncated.

Table 17–4 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Create Quick Task	No default value	Site	Use the Create Quick Task profile option to display the quick create button on the Tasks Summary window.	Set the value to **Yes** if you want the Quick Create button to appear in the Task Summary. Set the Value to **No** if you do not want the button to appear in the window.
Client Timezone	America/ Los_ Angeles	Site	The Client Time zone profile option is used by Calendar to set the default time zone for the client in the Create Appointment window.	Set the value to the location where your appointments take place. Setting the time zone from the profile link in the Calendar UI is another way to set and update this profile value.
Task Manager: Send Notifications to Group or Team Members	No	Site	The Task Manager: Send Notifications to Group and Team Members profile option provides the ability to notify either the Owner or the Assignee of a Group or Team resource, when a task is modified. This profile option is for workflow only.	If the value is set to **No**, then no notification will be sent to group or team members. If the profile option is set to **Yes**, then the system looks at any resources of type Group or Team and expand them to include any of their members whose resource type is RS_EMPLOYEE, RS_ PARTY or PARTY_PERSON. When adding a resource to the notify list, the system checks to see if the resource is already on the list before adding it.
Task Manager: Enable Automated Task Workflow Functionality	No	Site	The Task Manager: Enable Automated Task Workflow Functionality profile option is used to determine whether to send the automatic notifications or not.	Set the value to **No**, for the task workflows not to be initiated by the API. If the value is set to **Yes**, then task workflows are initiated by the API. The default value is No.
Task Manager: Abort Previous Task Workflow if it is still active	No	Site	The Task Manager: Abort Previous Task Workflow if it is still active profile option is used to determine whether to abort the previous workflow processes before starting the next one.	If the value is set to **No**, then the previous Task Workflows that are still active are not aborted. If the value is set to **Yes**, then the previous Task Workflows that are still active are aborted.

Table 17–4 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
JTF_TASK_ SUMMARY_ SOURCE	Source	User	The JTF_TASK_SUMMARY_ SOURCE profile option sets the view drop-down list value in the Task Summary context sensitive window. Possible values are Source and All.	Set the value to **Source** to have all tasks created with a particular source appear by default in the contextual window. Set the value to **All** to have all tasks created with a source as well as those which refer to that source appear by default in the context sensitive Task Summary.
Task Manager: Mass Task Reassign Access	No	Site	Use the Task Manager: Mass Task Reassign Access profile option to display the Task Reassignment window.	If the profile option is set to **Yes**, the Task Reassignment window is accessible and the administrator is able to reassign tasks. If the value is set to **No**, then the Task Reassignment window is not accessible and a relevant message is shown.
JTF Sync: Category Value	Oracle Business	System	This profile option is used in the Palm and Outlook synchronization process. It is to set the default value for the category while trying to download business contacts to the offline device.	All business contacts downloaded to the offline device will be created with this category. If the category does not exist in the offline device, then it will be created upon synchronization.
Task Manager: Copy Task Start Date to End Date	Yes	Site	This profile option is used to control the task start and end date for the Palm and Outlook synchronization.	If it is set to **Yes**, the task start date is defaulted from the system date and the task end date is defaulted to the task start date. For example, if it is set to Yes, then any changes the user made to the task start date while the user is in the task creation screen will automatically be populated to the task end date field.

Table 17–4 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Set Context Data Security	Full Access	Site	Use the Task Manager: Set Context Data Security profile option to set task data security for the context sensitive task instances.	If Full Access is selected, then all the tasks related to the context can be viewed, updated, and deleted. If Security Access is selected, then whether the task for that context can be updateable is based on the privileges granted to the user.

Note: See Appendix A, Profiles Options, for details on how these profile options can be set.

17.8 Running the Task Manager Concurrent Program

Task Manager uses one concurrent program, Rebuilding Intermedia Index for Task Names. This concurrent program rebuilds the intermedia index. In order for a user to see new and updated tasks and appointments when they use the quick find search, or have the ability to search on a task name, system administrator must run this concurrent program periodically.

Perform the following steps in Forms to run the Rebuilding Intermedia Index for Task Names concurrent program.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Requests > Run.**

Steps

1. In the Find Request window, click **Submit a New Request**.

   The Submit a New Request window opens.

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

   The Submit Request window opens.

3. Select the concurrent program: Rebuilding Intermedia Index for Task Names from the list of values (LOV).

   The Parameters window opens.

4. Enter the following information in the window:

   - JTF User's password
   - Apps User's password
   - CTX User's password

5. Click **Schedule** in the At These Times region.
6. Select the job to run periodically, in the Run the Job region.
7. Enter the start date and leave the end date blank to run the program indefinitely.
8. Define the interval in minutes, that you want the program to run and click **OK**.
9. Click **Yes** in the caution window if you selected for the program to run indefinitely.
10. Click **Submit** to confirm.
11. Click **No** to exit.

Guidelines

The following table describes the Rebuilding Intermedia Index for Task Names concurrent program.

Table 17–5 Task Manager Seeded Concurrent Programs

Name	Description	Frequency
Rebuilding Intermedia Index for Task Names	This program is used to rebuild the intermedia index so a user can use the quick find to search for new and updated tasks as well as to search by task name.	As needed

17.9 Setting Up Metadata Objects

You can add additional data in the JTF objects table. Metadata source objects have static definitions to dynamically retrieve data during runtime. This allows for the code to call the metadata source name, instead of writing the code out in every location.

Note: In some instances, Customer Profiles and Service Request notes, require a specific prefix or code name.

Perform the following steps to add data in JTF objects for use in Tasks Manager.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Setup > Objects Meta-data.**

Steps

1. Enter a name, description, and unique object code.
2. Enter or select information in the fields for all sections that are needed for this source.
   - Seeded check box: It indicates that the data is seeded. It cannot be updated by users.
   - From task check box: Select this check box if tasks can be created using the stand-alone Task Manager.
   - Start Date: Enter a start date that the object code is available in the text field.
   - End Date: Enter an end date that the object code is unavailable in the text field.
   - Application: Select the Application name from the list of values.
3. Enter the following information in the Lunch Details tab:
   - Function Name: Select the form function name registered as type, "FORM" from the LOV.

- Parameter: Enter the parameters to be passed to the form function to open the source form. The following parameters are passed to open the source form.
  - ID - Source_object_id
  - NAME - Source_object_name

  The rest of the parameters should be hard coded.
- Launch Method: Use the drop-down list to select the Launch method. The Launch method is only for forms. They are:
  - FND_FUNCTION: Executes a specified form function only if the form is attached. It always starts a new instance of the form.
  - APP_NAVIGATE: Executes a specified form function only if the form is attached and also allows a form to be restarted if it is invoked a second time.
- URL: Enter the URL for the application.
- Web Function: Select the web function from the LOV. This is the JSP Function Name. It should be registered in Functions as type JSP.
- Web Parameters: Enter the web parameters in the text field. These are the parameters to be passed to the JSP page. The following parameters are passed to open the source form.
  - ID - Source_object_id
  - NAME - Source_object_name

  The rest of the parameters should be hard coded.

4. Enter the following database information in the Select Statement Details tab:
   - ID Column: Enter the ID value to be fetched from a given table in the text field, such as task_id. The ID identifies the unique column that is stored as the records place holder.
   - Name Column: Enter the NAME value to be fetched from a given table in the text field, such as task_number. This column shows as the main search/result column value a user uses to select data.
   - Details Column: Enter the details value to be fetched from given a table, such as description. The details column gives user more information on the column to choose from in the LOV listing.

   Enter your select statement:

- From: Enter the name of the table where the data is obtained, such as jtf_tasks_vl.
- Where: Enter any Conditions of the selected data in the where clause, such as source_object_type_code = "TASK".
- Order By: Enter the order by which the records should be sorted, such as task_number.
- Select Statement: This read-only text field displays your select statement when clicking the **Check Syntax** button to validate the syntax of your statement before it is saved.

5. Enter the following information in the LOV and Data Security tab:

   In the LOV region:

   - Window: Enter a title for the List of values window in the text field. This is the Title that appears for the LOV generated for this source object.
   - Name: Enter the column name for List of values specified in the Select Statement Detail's "Name Column" field.
   - Details: Enter the Title for details column for List of values specified in the Select Statement Detail's "Detail Columns" field.

   In the Data Security Setup region:

   - Object Name: The name for a corresponding JTF_OBJECTS code. This name serves as the foreign key to FND_OBJECTS. This field is not required and can be empty (null).
   - Predicate Alias: This field adds security information to application query. It should only be used to avoid ambiguity when LOV query contains more than one table joined by data object primary key(s) values. For example, two tables ("jtf_tasks_b" and "jtf_tasks_tl") are used, then it must be entered with either "jtf_tasks_b" or "jtf_tasks_tl". Otherwise Oracle DBMS will report ambiguous task_id reference at the run time.

     If it is entered and the object name is not null, the value will be passed to an internal API to add security to a generated query for the LOV. However, if the object name is empty, then security predicate will not be added to the generated query.

   Refer to Customizing List of Values (LOV) Security for more resource LOV data security information.

6. Define the object user in the Usage tab:

- Object User: Select the object user from the list of values.

The **Seeded** check box is not editable. It indicates that the data is seeded.

Usage users are specified access locations where an object can be used. As long as the object is not seeded, all usages can be assigned.

See Also

- Setting Up the Source Object Code and Context
- Defining Task Statuses and Status Transition Rules
- Defining Task Priorities
- Defining Task Types
- Defining Task Date Types
- Designing Task Templates
- Defining Template Details
- Defining Task and Notes Reference Mapping
- Setting Profile Options
- Running the Task Manager Concurrent Program

18

Working with Task Templates

This chapter covers the following topics:

- Designing Task Templates
- Defining Template Details

18.1 Designing Task Templates

A task template is a skeleton task and a task template group is a grouping of different task templates. Creating a template eliminates the user's interaction with the specific properties of a task. This simplifies the task creation process when creating redundant tasks.

For example, a service department is constantly requested to have computer problems fixed. John Smith, a service director, requests the creation of a task template group called PC Repair that is specifically used for a service request. This template group consists of a set of required tasks, including customer appointment, computer repair, and progress update. These tasks are defined in a template format with task type, priority, and status information specified.

In addition to entering the basic task information into the task template, Task Manager provides the following two descriptive flexfields (DFF) for users to enter predefined flexfield information for your tasks:

- Task template groups additional information: It is located in the Template Groups region of the task template setup window. It allows users to enter descriptive information specifically for a task template group.
- Task Templates additional information: It is located at the end of the horizontal scroll bar of the Related Task Templates region. This descriptive flexfield is used specifically for each task template; therefore, its values can be passed to the tasks that are created based on the task template.

In addition, you can define additional resource types and unit information, dependencies, and task recurrence information for a task template. Once a template or template group is created, users are able to create multiple tasks simultaneously based on the selected template or template group.

You can only define templates and template groups in the Forms-based version of Task Manager.

> **Note:** The Private task flag in the Forms-based version of Task Manager is not supported at this time. This functionality will be removed in a future release. The new HTML-based Task Manager does support both Private and Public tasks.

Perform the following steps to design a task template.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Task > Task Templates**.

Steps

1. In the Setup Task Template Group window, define and enter the following:
   - Template group name
   - Description
   - Effective dates
   - Descriptive flexfield information for the template group
2. Select a document type from the list of values (LOV).
3. Define and enter a template name and description.
4. Select the type, status, and priority for the template.

   Please note that the available task Type and Priority list of values are populated based on your selected document type. For example, if a template group is created for Service Request, then you should see only the service request related task types and priority information listed in the list of values.

5. Select task flags. See the Guidelines section for additional information on task flags.

6. Optionally, click **Resources** to specify resource type and unit information, **Dependencies** to set task dependencies, and **Recurrences** to set task recurrences for the template group in the Task Template Details window. For more information on how to define resources, dependencies, and recurrences, see the Defining Template Details section.

7. Save your template.

   After saving the template, the Number field for each group you defined in the related task template region populates automatically. A task template now exists and task creation from the template is possible.

Guidelines

The following table describes task flags located in the Others tab.

Task Flag Descriptions

Flag	Description
Private	The Private flag is currently not supported.
Publish	The Publish flag indicates a task publishable over the web.
Holiday	The Holiday flag indicates whether or not the task can be performed on a holiday.
Multibook	The Multibook flag indicates whether or not the task can assign resources that are already assigned to other tasks.
Billable	The Billable flag signifies a task as a service that requires billing.
Milestone	The Milestone Flag indicates whether or not the task is a milestone.
Restrict Close	The Restrict Close flag indicates whether or not 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 must be closed to close the service request.

See Also

- Defining Task Priorities

- Defining Task Types
- Defining Task Statuses and Status Transition Rules
- Defining Task Date Types
- Setting Up Metadata Objects
- Defining Task and Notes Reference Mapping
- Setting Profile Options
- Running the Task Manager Concurrent Program

18.2 Defining Template Details

Additionally, you can define resource types and unit information, dependencies, and task recurrences by clicking the appropriate buttons to bring up the following tabs shown in the Task Details window:

- Resources: Enter resource type (such as employee resource) and required unit information for each task you specified in the Related Task Templates region.
- Dependencies: Enter task dependency information if necessary. This functionality is currently not supported.
- Recurrences: Enter task recurrence information for tasks you want to repeat on a regular basis.

Perform the following steps to define task template details.

Prerequisites

A task template must be created and saved.

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Task > Task Templates**.

Steps

1. In the Task Template Details window, with your template information defined, click **Resources**.

   The Task Template Details window opens.

2. Select a resource type from the list of values (LOV).
3. Enter the number of resources needed in the Required Units field.

   Selecting the Enabled Flag activates the resource type for the corresponding task template.
4. Any information defined in the Dependencies tab is not supported at this time.
5. In the Recurrence tab, select how you want the task to repeat, daily, weekly, monthly, or yearly, and provide information in the corresponding required fields.
6. Click **OK** to save your information.

See Also

Designing Task Templates

19 Customizing HTML Tasks Security

This chapter covers the following topics:

19.1 HTML Task Security Overview

With the continuous support of the existing task security rules, HTML Task Manager leverages the Application Object Library (AOL) data security model to provide a flexible mechanism for task security access. This new security model not only supports the task rules used in the past, but also provides the ability to restrict data access to appropriate users through a specific authorization process.

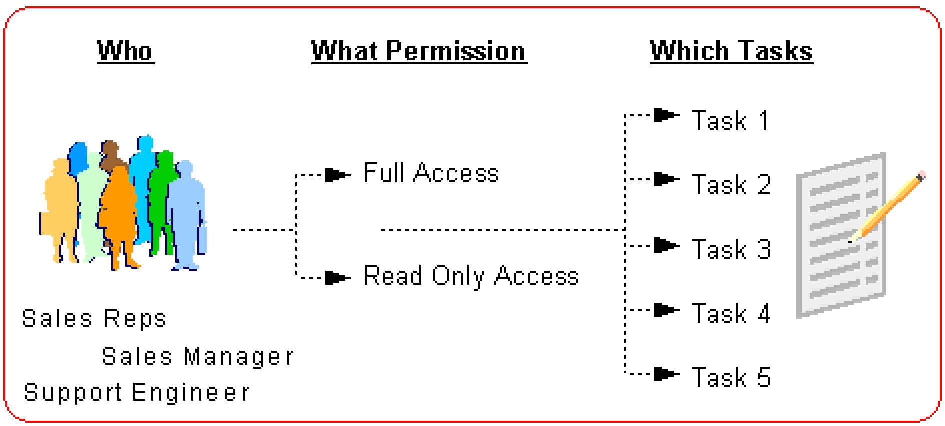
For example, if a company only wants certain tasks to be viewed or updated by a particular user or user groups, then, with the new security model, this can be achieved by granting a security access privilege (full access or read only) to the particular user or user groups to access specific tasks.

In other words, the task security authorization process can be considered as an analysis around

> *"**Who** (users or user groups) has **what permission** (full or read only access) to access **which tasks** (specific tasks)."*

The following figure illustrates the high level picture of the task security rule analysis.

Figure 19–1 Task Security Rule Analysis



> *For example, appropriate users who can be either sales representatives, sales managers, or support managers are granted with full access or read only access permission to access certain tasks, such as from Task1 to Task5.*

In order to authorize specific tasks access for particular users or user groups, the new task security model leveraging the concept of AOL data security can further allow users to customize task data for security authorizations. This includes customizing contextual task rules by using a profile option, building security around resource list of values, and allowing group managers to access his or her direct's tasks.

Before introducing how to customize the task security rules, it is necessary to understand the existing task security rules, and the new task security concepts based on AOL data security. Therefore, relevant AOL data security concept and terminology will also be introduced in this chapter.

Note: The data security is enforced only in the HTML Tasks.

19.2 Existing Task Security Rules

Task Manager implicitly grants users with the following task security access:

- For the stand-alone tasks:
  - The owner or assignee of a task has full access to the task.
  - If a group or team is the owner or the assignee of the task, then all the group or team members have full access to that task.

  Two security access privileges are used in Tasks:

  - Read Only Access: Resources can only view tasks.
  - Full Access: Resources can view, update, and delete tasks.

  In addition, a resource can explicitly grant another resources full access or read only access to his or her tasks except the private tasks. This can be done through the calendar grant functionality.

- For the context sensitive tasks, currently Task Manager allows any users who can access the business object to have full access to all contextual tasks related to the object.

19.3 New Task Security Model

In order not only to continue supporting the existing task security rules, but also to provide a flexible system with the ability to restrict data access to appropriate users and to further customize the security rules to meet various business needs, HTML Task Manager leverages the AOL data security model to provide a new task security model.

This section covers the following topics:

- What is AOL Data Security Model
- Terms and Definitions
- How Does the New Security Model Work

19.3.1 What is AOL Data Security Model?

There are four different aspects of security access used in the AOL security model:

- **User security** is about determining the user identify and preventing access from unauthorized users.
- **Network security** is about ensuring that communications over the network are secure.
- **Function security** is about controlling what people can do on the system. It focuses on which applications and modules you have access to.
- **Data security**, like function security, is also about controlling what people can do on the system. However, it focuses on what rows or columns of data you can look at as well as what operations can be carried out on those rows or columns.

The Data Security is comparatively a new feature in AOL security model. It is used to model and enforce security authorizations for access and **modification** of specific data records. In other words, data security is the finest security level that allows users to customize records in the data level.

To be able to customize task security in the data level, AOL data security model uses the concepts of object, object instance, and object instance sets to represent task features and possible modification, the concepts of privileges and roles to translate data access permissions, and the concepts of grants or global grants to represent the authorization process.

Take one of the existing task rules, for example, to further explain the AOL data concepts used for task rule customization:

> The owner or assignee of a task has full access to the task.

In the AOL data security framework, owner or assignee can be translated as a user or user group. Full access is an access privilege that a user can act upon or perform on a task. As to "the task", Task Manager uses the concepts of objects, object instances, and object instance sets to explain the features of a task. For example, a task is considered as an object, task with number 1234 can be considered as an object instance. A grouping of multiple object instances is an object instance set. Therefore, tasks with number starting at 1000 to 1999 can be an object instance set.

With the new security model, the HTML Tasks module enable users to define and further customize the security rules for various business needs.

Detailed information on AOL data security framework, refer to *Oracle Applications System Administrator's Guide*.

19.3.2 Terms and Definitions

HTML Task Manager uses the following concepts, based on AOL data security model, to provide the flexibility to cover a wide range of data security scenarios:

- Users (User Groups)
- Objects
- Object Instances
- Object Instance Sets
- Privileges (Functions)
- Roles (Menus)
- Grants (Authorizations)
- Global Grants

Users (User Groups)

A user is a single person with an account on the system (represented by a row entry in FND_USER). Users can be grouped into groups. Therefore, a user role may represent a user or group of users. A user group is any grouping of FND_USERS who are exposed through the WF_ROLES view.

Users and user groups can be referred as **Grantee** if they are the subjects of a data security grant. These users and user groups must be exposed in the WF_USER/WF_ROLES.

Objects

An object is a type of thing on which security can be managed. For example, a task is considered as an object.

In a technical definition, each object must be registered in the FND_OBJECTS tables. Every object definition will contain related database object (table or view) and primary key information for the object.

Object Instances

An object instance is a particular instance of an object. This generally corresponds to a row (or related set of rows) in the database. If Tasks is considered as an object, then Task with number 1234 is an object instance.

In a technical explanation, object instances are derived from the primary key values. The primary key values should be set for the registered object in the FND_GRANTS.

Object Instance Sets

An object instance set is a group of multiple object instances. For example, all tasks assigned to a user or all tasks with a number smaller than 5 could be considered an object instance set.

In a technical definition, object instance set definition is stored in the FND_OBJECT_INSTANCE_SET and FND_OBJECT_INSTANCE_SET_TL tables. The definition contains a SQL where clause by a predicate that combined with the object definition will return all the object instances that are part of the object instance set.

An object instance set can be expressed in the following predicate for all tasks with a number smaller than 5. To avoid processing issues, all the columns used in the predicate should be prefixed with `&TABLE_ALIAS` in the object instance set definition. Then, this predicate can be added to the where clause.

```
SELECT *
FROM jtf_tasks_b
WHERE Owner_id = FND_GLOBAL.USER_ID

AND &TABLE_ALIAS.task_id < 5
```

Note: Referencing PARAMETERx values from the grants can also parameterize the predicate.

Privileges (Functions)

A function is an action that can be performed on an object or object instance. It is the smallest unit of secured product functionality. It can be granted to a user or user group which means gives them permission to perform that function. Therefore, it can also be referred as a permission or privilege from a user’s point of view.

There are two seeded security privileges currently used in the Task Manager:

- JTF_TASK_READ_ONLY (view only)
- JTF_TASK_FULL_ACCESS (update and delete)

Since these privileges are registered in the FND_FORM_FUNCTIONS and FND_FORM_FUNCTIONS_TL tables and they are referenced in the actual code so that they cannot be changed or extended.

In addition, privileges (functions) can be grouped into roles (menus) to reduce the granting overhead.

Roles (Menus)

A menu is a grouping of functions. Menus are used as roles for data security. It is required to group functions into related sets of menus necessary to perform a particular data security role on an object instance. A good example is an "Administrator" role, which might include many privileges required for a user with an administrator role to access the data.

Currently, there are two new roles registered in the FND_MENUS and FND_MENUS_TL tables specifically for task security:

- JTF_TASK_READ_ONLY: This role contains one privilege, JTF_TASK_READ_ONLY.
- JTF_TASK_FULL_ACCESS: This role contains two privileges, JTF_TASK_READ_ONLY and JTF_TASK_FULL_ACCESS.

The role privileges can be registered in the FND_MENU_ENTRIES and FND_MENIU_ENTRIES_TL tables.

> **Note:** Roles are user definable, the seeded roles only exist to ensure backward compatibility.

Grants (Authorizations)

A grant is an authorization for the grantee (a user, or group of users) to perform the specified security role on the specified object instance or object instance set. Therefore, grants are what tie the whole thing together. A grant consists of the following three components:

- Object: Any object instance or object instance set, for instance, all non-private tasks (object: JTF_TASKS and object instance set: JTF_TASK_RESOURCE_TASKS)
- Grantee: Any user or user group, for instance, "JDOE" for John Doe
- Role (Menu): Any role, for instance, "JTF_TASK_FULL_ACCESS"

This grants the user, John Doe, the privilege to have full access to all non-private tasks.

In addition, all grants should be registered in table FND_GRANTS.

Calendar Grants

Task Manager still supports the calendar grant functionality, which means that when a user gives calendar access to another user, the access for tasks is also given. Since Task Manager uptakes AOL data security model, task security can be further customized. Granting calendar access to another user will still result in granting task access to the user. However, the access to the tasks can be restricted by additional data security implemented for tasks.

In the backend, the data that is being entered into FND_GRANTS table is not compatible with the way the FND_APIs work. In order to solve the backward compatibility issue, a new row for the task security is created while the same row for calendar is still kept. Therefore, on every grant, there would be two rows created (instead of one row). The same is true for every revoke. Two rows will be deleted.

Global Grants

To reduce the administration of grants, authorizations can be granted globally to the following:

- The "Global" user or user group
- The "Global" object instance

For example, any user will have full access to tasks where she or he is the owner or assignee. The seeded global grant uses the following values and customer cannot revoke this grant:

```
FND_GRANTS
    GRANTEE_TYPE = "GLOBAL"
    GRANTEE_KEY = "N/A"
    MENU_NAME = "JTF_TASK_FULL_ACCESS"
    OBJECT_NAME = "JTF_TASKS"
    INSTANCE_TYPE = "SET"
    INSTANCE_SET_NAME = "JTF_TASK_USER_TASKS"
```

Another global grant example can be that any user can see any resource team:

```
FND_GRANTS
    GRANTEE_TYPE = "GLOBAL"
    GRANTEE_KEY = "N/A"
    MENU_NAME = "JTF_TASK_RESOURCE_ACCESS"
    OBJECT_NAME = "JTF_RS_TEAMS"
    INSTANCE_TYPE = "GLOBAL"
```

19.3.3 How Does the New Security Model Work?

With the leverage of AOL data security model, Task Manager adds the following two security functions to the new security model:

- **Predicate**: Adding a security predicate, the "where" clause, to an application query limits the task instance access for users. The predicate can be considered as the add-on new security rule to Tasks. To avoid processing issues, all the columns used in the predicate should be prefixed with `&TABLE_ALIAS` in the object instance set definition. As a result, a user will be only able to see certain task instances (such as all tasks with task id less than 5) that she or he has any kind of privileges.

  For example, add a predicate (where clause) to an existing query:

  ```
  SELECT *
  FROM jtf_tasks_b
  WHERE Owner_id = FND_GLOBAL.USER_ID

  AND &TABLE_ALIAS.task_id < 5
  ```

  > **Note:** In the new security model, a user can have access to an object instance in many ways, such as access to an instance may be granted to the user, to the user's group(s) or to all users. Consequently the predicate might return duplicate instances

- **Check Function**: This allows the system to check whether or not a particular user has an appropriate access privileges (full or read only access) on a specific task instance.

With the two new functions added to Tasks, appropriate task instances are presented in the following logic:

For example, for the stand-alone task screens:

1. Add predicate to the main query.
2. Check full access privilege for retrieved task instances.
3. Display task instance(s) as updateable or read-only.
4. Check corresponding privilege before accessing the detail page.

19.4 Customizing HTML Tasks Data Security

Based on the new task security model, HTML Task Manager allows task security rules to be further customized in the following ways:

- Set the security profile option for the context sensitive tasks
- Customize list of values (LOV) security
- Grant manager-directs security access

19.5 Setting the Security Profile Option

Task Manager uses the *Task Manager: Set Context Data Security* profile option to control task data security for the context sensitive task instances, such as tasks attached to an opportunity or a lead. By using the profile option, you can choose to turn the task security function on or off based on the following profile values:

- If **Full Access** is selected (default value), then all the tasks related to the context can be viewed, updated, and deleted.

  This value turns the security OFF so as to support existing task security (backward compatibility), which allows any users with access to related object instance to update (full access) any task instance for that object.

- If **Security Access** is selected, then whether the task for that context can be updated is based on the privileges granted to the user.

  This value turns the security ON for all task instances within context and only allows task accessible to the user with appropriate privileges.

Task Security Access Example

Three tasks (T1, T2, and T3) are created for an opportunity. User 1 is the owner of the task T1 and T2. Task T2 is also assigned to User 2. User 2 owns the Task T3.

Task Data Security Condition:

Grant read only access on task T3 (task id = 120087) to User 1.

```
FND_GRANTS
    GRANTEE_TYPE = "USER"
    GRANTEE_KEY= "USER1"
    MENU_NAME = "JTF_TASK_READ_ONLY"
    OBJECT_NAME = "JTF_TASKS"
    INSTANCE_TYPE = "INSTANCE"
    INSTANCE_PK1_VALUE = "120087"
```

If Security Access is selected which turns the security function on, then the access privileges are changed to:

- User 1 can have full access to task T1 and T2, but has read only access to T3.
- User 2 can have full access to task T2 and T3.

In the past, all users who have access to a business object can have full access to all contextual tasks attached to that object. Therefore, both User 1 and User 2 can have full access to all three tasks attached to that opportunity.

If Full Access is selected which turns the security function off, then the task access privileges for User 1 and User 2 are changed to:

- Both User 1 and User 2 can have full access to Task T1, T2, and T3.

This is because if both users can access the opportunity business object, then they should all be able to access all contextual tasks for that object.

How Does the Context Sensitive Task Screen Generate?

Since the profile option controls the security access for contextual tasks, before displaying the task detail page, Task Manager will:

1. Check the profile value first to determine whether to display task instance(s) as updateable or read-only; then
2. Check corresponding privilege to determine whether the logged-in user has any particular privilege on the particular task instance before the user can access any task detail page.

How to Set the Profile Option

Login with the System Administrator responsibility, and navigate to **Profile > System** to access the Find System Profile Values window.

See Appendix A, Profiles Options, for details on how these profile options can be set.

See Also

- Customizing List of Values Security Access
- Granting Manager-Directs Security Access
- HTML Task Security Overview
- Existing Task Security Rules

- New Task Security Model
- Troubleshooting HTML Task Data Security

19.6 Customizing List of Values Security Access

In addition to restricting task data access using the profile option, Task Manager also allows you to build security around the resource list of values (LOV) by using the concepts of the object instances or object instance sets.

Note: The resource list of values can be resources of any category (employee, party, partner, supplier contact, group, team, other, and to be hired).

In addition, resource LOV security functionality is based on resources. Therefore, it applies to owner, assignee, and reference (relate to) if it is defined based on resources. It does not apply to any customer/contact LOV (such as organization, person, or relationships) and reference other than resources (such as customer/contact and lead.)

Business Reason

For example, a sales manager is responsible for a special deal that only involves limited resources. To make sure that relevant tasks created for that deal are only restricted to certain people, the system administrator can create a specific set of resources and then grant them to the sales manager. Thus, the manager will only see those resources shown in the resource (owner or assignee) list of values when creating a task.

For the similar reason, another set of resources can be granted to sales representatives. As a result, the sales representatives will not be able to see the resources granted to the sales manager, and the manager will not see the resources granted to the representatives.

Before introducing necessary steps to customize resource LOV, it is important to understand JTF object changes and other seeding strategy recently made in Task Manager to support the LOV security.

19.6.1 JTF Object Changes

In order to support the LOV data security, Task Manager modifies the JTF object meta-data form by adding two extra columns grouped in the Data Security Setup region of the LOV and Data Security tab. This establishes the link between JTF_OBJECTS for existing LOV and FND_OBJECTS for all task data security objects.

Because in Tasks, on one hand, all LOVs are rendered using the common LOV Renderer. The LOV Renderer uses JTF_OBJECTS as meta-data repository providing input to all needed data when generating the LOV in a query. This query may be defined at design time or generated dynamically from JTF_OBJECTS. The LOVs addressed here are all generated dynamically.

On the other hand, all data security objects are newly defined in the FND_OBJECTS.

In order to build connection between these two so that the existing LOV could have an extra security build on top of it, Task Manager uses the Data Security Setup region in the JTF object meta-data form to establish the link.

To access the security set up region, log on with the CRM Administrator responsibility, select the Task and Escalation Manager > Setup > Objects Meta-data.

There are two new fields in the LOV and Data Security tab:

- **Object Name**: It is the object name for a corresponding JTF_OBJECTS code and serves as the foreign key to FND_OBJECTS. This field is not required and can be empty (null).
- **Predicate Alias**: It adds security information to application query. It should only be used to avoid ambiguity when LOV query contains more than one table joined by data object primary key(s) values. For example, if two tables ("jtf_tasks_b" and "jtf_tasks_tl") are used, then it must be entered with either "jtf_tasks_b" or "jtf_tasks_tl". Otherwise Oracle DBMS will report ambiguous task_id reference at the run time.

  If this field is entered and the object name is not null, the value will be passed to an internal API to add security to a generated query for the LOV. However, if the object name is empty, then security predicate will not be added to the generated query.

19.6.2 Other Seeding Strategy

In addition to the JTF object change, Task Manager also makes the following changes in order to support the LOV security:

Creating new privilege (function) and role (menu):

- JTF_TASK_RESOURCE_ACCESS privilege (registered in the FND_FORM_FUNCTIONS table)
- JTF_TASK_RESOURCE_ACCESS role (registered in the FND_MENUS table) or JTF_TASK_RESOURCE_ACCESS role (registered in the FND_MENU_ENTRIES table)

Registering LOV object data:

The resource team registered corresponding data object in JTF_OBJECTS. The following table represents the seeded data:

Table 19–1 Seeded Object Data

JTF Object Code	FND Object Name
RS_EMPLOYEE	JTF_RS_RESOURCE_EXTNS
RS_INDIVIDUAL	JTF_RS_RESOURCE_EXTNS
RS_OTHER	JTF_RS_RESOURCE_EXTNS
RS_TBH	JTF_RS_RESOURCE_EXTNS
RS_GROUP	JTF_RS_GROUPS
RS_TEAM	JTF_RS_TEAMS
RS_PARTNER	JTF_RS_RESOURCE_EXTNS
RS_PARTY	JTF_RS_RESOURCE_EXTNS
RS_SUPPLIER_CONTACT	JTF_RS_RESOURCE_EXTNS

Creating global grants:

In order to provide backward compatibility, the following global grants are shipped:

- Any user can see any resource:

```
FND_GRANTS
    GRANTEE_TYPE = "GLOBAL"
    GRANTEE_KEY= "N/A"
    MENU_NAME = "JTF_TASK_RESOURCE_ACCESS"
    OBJECT_NAME = "JTF_RS_RESOURCE_EXTNS"
    INSTANCE_TYPE = "GLOBAL"
```

- Any user can see any resource group:

```
FND_GRANTS
```

```
GRANTEE_TYPE = "GLOBAL"
GRANTEE_KEY= "N/A"
MENU_NAME = "JTF_TASK_RESOURCE_ACCESS"
OBJECT_NAME = "JTF_RS_GROUPS"
INSTANCE_TYPE = "GLOBAL"
```

- Any user can see any resource team:

```
FND_GRANTS
    GRANTEE_TYPE = "GLOBAL"
    GRANTEE_KEY= "N/A"
    MENU_NAME = "JTF_TASK_RESOURCE_ACCESS"
    OBJECT_NAME = "JTF_RS_TEAMS"
    INSTANCE_TYPE = "GLOBAL"
```

If a system administrator decides to set the LOV security, then she or he should first disable corresponding global grant for the LOV data object by setting an end date to the specific global grant.

19.6.3 Customizing Resource LOV

The resource LOV can be further customized if necessary before it is granted to resources or resource groups. Therefore, it is necessary to understand when the customization needs to be done and how it can be done. In addition, how to grant the LOV to a user is also addressed here.

19.6.3.1 When to Customize the Resource LOV

The system administrator can grant an individual resource, all resources, or a specific set of resources to another resource, group of resources, or all resources.

Grant An Individual Resource

For example, in the lowest security level and the most gradual one, a system administrator can grant a single employee resource (resource number 1234) access to the following grantee(s):

- A user "John Doe"
- All members of a resource group (group number 9876)
- All users

Grant All Resources

As opposite to the previous one, in the most global security level, the administrator may grant all resources (global access) to another resource, all members of a resource group, or all users.

Grant A Specific Set of Resources

When there is a need to grant a specific set of resources to a user, all members of a resource group, or all users, the administrator can customize the resource LOV by using object instance sets.

19.6.3.2 Defining Object Instance Sets

For example, a company wants to grant access of a specific set of resource to a user, all members of a resource group, or all users.

This specific set of resources can be created by first registering a new parameterized object instance set using the following data:

```
FND_OBJECT_INSTANCE_SETS
    INSTANCE_SET_NAME = "X_JTF_RS_GROUP_MEMBERS"
    DISPLAY_NAME = "Members of Resource Group"
    DESCRIPTION = "Members of Resource Group"
    OBJECT_NAME = "JTF_RS_RESOURCE_EXTNS"
    PREDICATE =
        "&TABLE_ALIAS.resource_id IN (SELECT resource_id FROM jtf_rs_group_
        members WHERE TO_CHAR(group_id) = &GRANT_ALIAS.PARAMETER1)"
```

Please note that `&TABLE_ALIAS` is added as column alias in order to avoid problems with conflicting column names during runtime execution.

Note: Any new instance set must be designed very carefully. It must be error free and should perform well. Because any error introduced by the new set(s) can cause data corruption or erroneous behavior in Task Manager.

Use the following steps to define object instance sets:

Prerequisites

An object must be in place.

Responsibility

FND Security Administration (Self Service Application)

Navigation

Objects

Steps

Tips: First locate the object that you want a new instance set created for, then enter necessary information for the set.

1. Enter necessary search information in the Find Objects window to locate the JTF_TASKS object. Search results should be listed after executing the search.
2. Click the object name hyperlink for which you want the new instance set to be created from the search result to open the Find Object Instance Set window.
3. Existing instance sets for the selected object are also listed here. Click **Create New Instance**.
4. Enter instance set detail information including instance set name, display name, description and predicate.
5. Save your work.

Detailed information on how to define object instance sets, see *Oracle Applications System Administrator's Guide*.

Guidelines

Once the instance set is registered, it can be granted to another resource, group of resources, or all resources. The system administrator needs to set resource group_id in the grant PARAMETER1.

19.6.3.3 Granting the LOV to a User

Before adding new grants, it is necessary to first disable the existing grants or necessary seeded global grants so that they will not interfere with the new grants.

Disabling Existing Grants

To temporarily disable the existing grants, the system administrator can set the end date for the existing grants, instead of deleting them completely.

Prerequisites

None

Responsibility

FND Security Administration (Self Service Application)

Navigation

Grants

Steps

1. Search the existing grants that you want to disable by entering search criteria in the Search Grants window.
2. Click **Go** to retrieve the grants that match your search criteria.
3. Select the grant that you want to disable from the search result.
4. Set an end date in the Context window and click **Finish** to disable the grant.

More information on how to disable existing grants, see *Oracle Applications System Administrator's Guide.*

Adding New Grants

Once the customized resource LOV (object instance set) is created and registered, it can be granted to another resource, group of resources, or all resources.

Please note that the administrator can grant users or user groups (grantee) with different levels of data access privileges. The access can be granted to function (menu) level (such as "Administrator" role) or further down to the data level (such as the LOV data level) depends on users or business needs.

Since the LOV access privilege controls the row level of data access, whenever there is a need to create a new grant for LOV security access, use the data grant functionality to add this grant.

For example, if group number 10000123 contains all resources defined for the LOV in the object instance set, then the administrator can use data grant functionality to grant the LOV access to user21. As a result, the user can see all members of resource group 10000123 while creating a task. The data grant information should be like:

```
FND_GRANTS
    GRANTEE_TYPE = "USER"
    GRANTEE_KEY= "USER21"
    MENU_NAME = "JTF_TASK_RESOURCE_ACCESS"
```

```
OBJECT_NAME = "JTF_RS_RESOURCE_EXTNS"
INSTANCE_TYPE = "SET"
INSTANCE_SET_NAME = X_JTF_RS_GROUP_MEMBERS"
PARAMETER1 = "10000123"
```

Use the following steps to add a new grant:

Prerequisites

None

Responsibility

FND Security Administration (Self Service Application)

Navigation

Grants

Steps

1. Select **Create Data Grant** to add new grants to sales managers or sales representatives.
2. In the Object window, select JTF_TASKS as the object name.
3. In the Grantee window, select an appropriate radio button.
4. In the Function Set window, specify a menu name, such as JTF_TASK_RESOURCE_ACCESS.
5. In the Data Set window, select the A parameterized set of rows (Data Set) radio button. Furthermore, specify the appropriate object instance set that you want to grant to the grantee.
6. In the Data Set Details window, enter appropriate primary key values.
7. In the Context window, enter appropriate organization, responsibility and start date information. Leave the End Data field blank.
8. Enter JTF_TASKS in the Program Name field.
9. Enter appropriate information in the Program Tag field.
10. Click **Finish**. Once it is done successfully, the confirmation page opens with the message saying that the grant has been created.

More information on how to create data grants, see *Oracle Applications System Administrator's Guide.*

See Also

- Setting the Security Profile Option
- Granting Manager-Directs Security Access
- HTML Task Security Overview
- Existing Task Security Rules
- New Task Security Model
- Troubleshooting HTML Task Data Security

19.7 Granting Manager-Directs Security Access

In order to support reporting hierarchy used in Sales or Support organizations, HTML Task Manager allows group managers who have effective manager's role to have appropriate privileges to access their direct's tasks if necessary permissions are granted to them. Sales managers, for example, can view their direct's tasks and be able to track possible sales related activities performed for a particular week.

Before granting any security access privileges to managers, we should first understand:

- The Functionality of Manager-Directs Security Access
- Definition of Reporting Hierarchy (how the group is defined)
- Seeding Strategy
- Other Limitations
- Customize the Manager-Directs Security Access

19.7.1 The Functionality of Manager-Directs Security Access

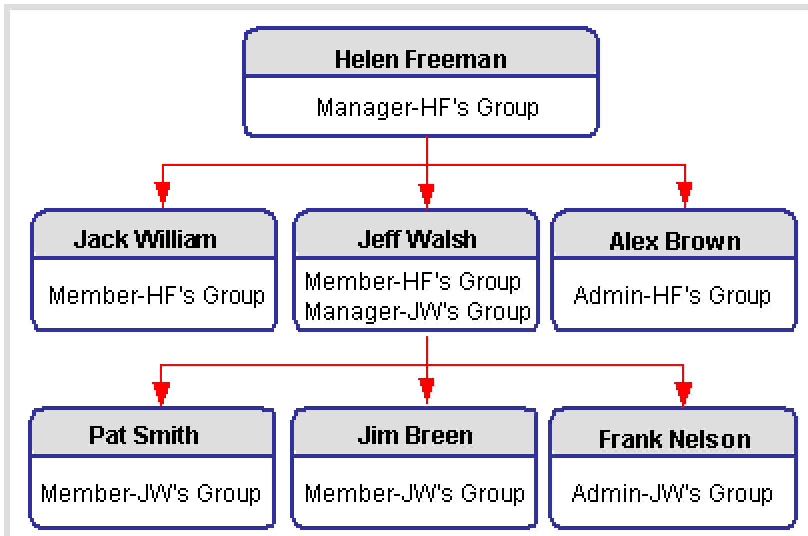
HTML Task Manager uses the manager-direct security access functionality to grant group managers an appropriate access privilege (read only or full access) to view or update their resource group member's non-private tasks.

Use the following example to understand how this functionality works in a resource group hierarchy.

> For example, a resource group is lead by Helen Freeman who has three directs reporting to her. These three directs are Jack William, Jeff Walsh, and Alex Brown who plays the administrator in Helen's group. Jeff Walsh who reports to

Helen has three group members directly reporting to him. They are Pat Smith, Jim Breen, and Frank Nelson who plays the administrator role.

Figure 19–2 The Helen Freeman's Group Hierarchy



After this resource group is organized, the hierarchical data will be denormalized and populated in the table JTF_RS_REP_MANAGERS as follows:

Table 19–2 Group Denorm Data in the JTF_RS_REP_MANAGERS TABLE

Member Name	Associated Group	Hierarchy Type	Parent Resource Name	Denormal-ization Levels
Alex Brown	HF's group	ADMIN_TO_ ADMIN	Alex Brown	0
Jeff Walsh	HF's group	MGR_TO_ MGR	Helen Freeman	1
Jeff Walsh	JW's group	MGR_TO_ MGR	Helen Freeman	1
Jim Breen	JW's group	MGR_TO_REP	Helen Freeman	1
Frank Nelson	JW's group	MGR_TO_ ADM	Helen Freeman	1

Table 19–2 Group Denorm Data in the JTF_RS_REP_MANAGERS TABLE

Member Name	Associated Group	Hierarchy Type	Parent Resource Name	Denormal-ization Levels
Pat Smith	JW's group	MGR_TO_REP	Helen Freeman	1
Alex Brown	HF's group	MGR_TO_ADMIN	Helen Freeman	0
Helen Freeman	HF's group	MGR_TO_MGR	Helen Freeman	0
Jack William	HF's group	MGR_TO_REP	Helen Freeman	0
Jeff Walsh	HF's group	MGR_TO_REP	Helen Freeman	0
Pat Smith	JW's group	REP_TO_REP	Pat Smith	0
Jim Breen	JW's group	REP_TO_REP	Jim Breen	0
Jack William	HF's group	REP_TO_REP	Jack William	0
Frank Nelson	JW's group	ADM_TO_ADM	Frank Nelson	0
Pat Smith	JW's group	MGR_TO_REP	Jeff Walsh	0
Frank Nelson	JW's group	MGR_TO_ADM	Jeff Walsh	0
Jim Breen	JW's group	MGR_TO_REP	Jeff Walsh	0
Jeff Walsh	JW's group	MGR_TO_MGR	Jeff Walsh	0
Jeff Walsh	HF's group	REP_TO_REP	Jeff Walsh	0

Note: In addition to the columns in the JTF_RS_REP_MANAGERS table, the following columns must be considered:

- START_DATE_ACTIVE
- END_DATE_ACTIVE

After understanding the functionality of the manager-directs access and how it works, the definition of a reporting hierarchy should be further identified.

19.7.2 Definition of Reporting Hierarchy

The definition of manager-subordinate hierarchy used for granting security access is based on the resource Group Hierarchy defined in Resource Manager. It is not based on the Human Resource (HR) reporting structure defined in the HR system.

Group Hierarchy in Resource Manager

While defining resource group hierarchy in Resource Manager, each resource will perform certain roles in a resource group. For example, a sales group can be organized by a few sales representatives and a sales manager. The sales representative and sales manager are the roles that are associated with each resource in that group.

In order to determine the reporting hierarchy in a group, each role is also associated to a specific role attribute. When a role is assigned to a resource, a role attribute is also given to that resource simultaneously. A sales representative role is associated with a member role attribute, and a sales manager role is linked to a manager role attribute. Therefore, group members with sales representative roles could report to the group member with sales manager role in the sales resource group mentioned earlier.

Each resource group can be formed for a specific period of time, so as to the group member's roles. Therefore, when an end date (END_DATE_ACTIVE) is specified for a resource group or for any resource role of the group members, that group or a specific role can be terminated.

For more information, see Resource Manager chapter in the *Oracle Common Application Components Implementation Guide*.

Highlights of Group Hierarchy For the Manager-Directs Security Access

Since the manager-directs security grant functionality is based on the group hierarchy defined in Resource Manager, not HR hierarchy, it is possible to have multiple managers in one resource group, and these managers will all be granted with security access to view or update their direct's tasks in the HTML Tasks.

In addition, as resource groups and roles can be terminated, only the managers who have effective manager's roles can be granted with security access to his or her direct subordinate's tasks. This grant only works if the managers belong to an effective resource group. If one of the manager's subordinates left the group, or the role has been terminated, then the manager will not be able to see the subordinate's tasks even with full access privilege.

Note: Even full access is granted to a group manager, that manager still cannot see his or her direct's private tasks.

19.7.3 Seeding Strategy

A new object instance set JTF_TASK_MANAGER_SECURITY is seeded in Tasks to support the manager-directs security grant functionality.

19.7.4 Other Limitations

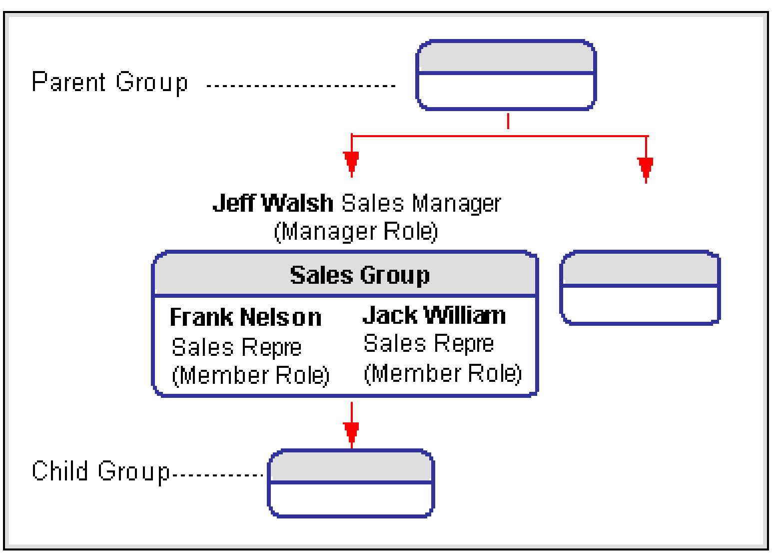
HTML Task Manager supports the manager-directs security grants, however, there are some restrictions for performance reasons and avoiding complexity.

Only Support "Manager" and "Member" Role Attributes

Resource Manager uses four role attributes (manager, admin, lead, and member) to associate a resource role while defining a resource role. However, this functionality only supports the Manager and Member role attributes.

Only Support One Level of Group Hierarchy

Figure 19–3 Resource Group Hierarchy



A group might have parent groups and child groups. However, Task Manager only supports one level of group hierarchy for the manager-directs security access. This means that a manager can only be granted with access of his subordinate's tasks of one level below him. It does not include any multiple levels beneath. In other words, this grant only limits to one group. It does not extend to its parent or child groups.

Only Implemented in HTML Tasks

This functionality only applies to HTML Tasks. It is not implemented in the Forms-based Tasks.

19.7.5 Customizing Manager-Directs Security Access

Use the following steps to grant security access to group managers:

- Defining Resource Group Hierarchy
- Granting Security Access to Relevant Resources

19.7.6 Defining Resource Group Hierarchy

Use Oracle Resource Manager to define resource group hierarchy.

> **Note:** After defining appropriate groups, the group hierarchical data is denormalized and populated in the table JTF_RS_REP_MANAGERS.

Detailed information on how to define employee resources, group resources, and assigning appropriate group member roles to each group member, see Resource Manager chapter of the *Oracle Common Application Components Implementation Guide*.

19.7.7 Granting Security Access to Relevant Resources

Once the appropriate group hierarchy is identified, system administrator can grant the seeded object instance set JTF_TASK_MANAGER_SECURITY with read only or full access to appropriate group managers.

Use the following steps to add a new grant to resource group managers:

Prerequisites

None

Responsibility

FND Security Administration (Self Service Application)

Navigation

Grants

Steps

1. Select **Create Data Grant** to add new grants to sales managers or sales representatives.
2. In the Object window, select JTF_TASKS as the object name.
3. In the Grantee window, select an appropriate radio button.
4. In the Function Set window, specify a menu name (JTF_TASK_READ_ONLY or JTF_TASK_FULL_ACCESS) for either read only or full access.
5. In the Data Set window, select the A parameterized set of rows (Data Set) radio button. Furthermore, specify the seeded object instance set JTF_TASK_MANAGER_SECURITY.
6. In the Context window, enter appropriate organization, responsibility and start date information. Leave the End Data field blank.
7. Enter JTF_TASKS in the Program Name field.
8. Enter appropriate information in the Program Tag field.
9. Click **Finish**. Once it is done successfully, the confirmation page opens with the message saying that the grant has been created.

More information on how to create data grants, see *Oracle Applications System Administrator's Guide.*

See Also

- Setting the Security Profile Option
- Customizing List of Values Security Access
- HTML Task Security Overview
- Existing Task Security Rules
- New Task Security Model
- Troubleshooting HTML Task Data Security

19.8 Troubleshooting Task Data Security

System administrator must perform the following steps in order for task owners to have full access to the tasks that they just created. Otherwise, they will have read only access to these tasks.

1. Use Adadmin to compile menus
2. Bounce the middle tier after compiling menus

See Also

- HTML Task Security Overview
- Existing Task Security Rules
- New Task Security Model
- Customizing HTML Tasks Data Security

20

Troubleshooting Task Manager

This chapter covers the following topics:

- Common Implementation Errors
- Answers to Frequently Asked Questions (FAQs)

20.1 Common Implementation Errors

20.1.1 Task Search On Name Does Not Return Results

If the Quick Find or the personalized search on task names does not return results, then rebuild the Intermedia index.

This can be done one of three ways.

- Manually rebuilding the Intermedia index using the alter index command.
- Starting the ctxsrv server daemon for background DML processing. For more information, consult the *Oracle8i interMedia Text Reference.*
- Run the Task Manager concurrent program, Rebuilding Intermedia Index for Task Names.

20.1.2 UOM is Invalid or Disabled

If you experience this problem, perform the following:

1. The Time Unit of Measure class must be defined in the Inventory module. For this Time Unit of Measure class, define the Unit of Measure codes (such as Hours, Minutes, etc.)

For details on defining the Unit of Measure class, refer to the I*nventory Users Guide*.

2. The profile "Time Unit Of Measure Class" must be set to Time Unit of Measure class defined in the inventory module.

20.2 Answers to Frequently Asked Questions (FAQs)

The following are frequently asked questions. Answers to these questions may help you in troubleshooting problems with Task Manager.

20.2.1 How Do You Map Task Types, Priorities, and References?

You can map task types, task priorities, and references to any source using the Object Mapping window. In both the HTML and the Forms-based Task Manager, priorities and date types that are mapped to a source and those that are not mapped to any source appear in the corresponding LOV, in the Forms-based version, or in the drop-down list in the HTML version. For references, only mapped types, priorities, and date types appear in the HTML user interface (UI). For information on how to map task types, priorities, and references, see the following sections:

- Defining Task Priorities
- Defining Task Types
- Defining Task Date Types
- Defining Task and Notes Reference Mapping

20.2.2 What is the Difference Between Task Types and Task Categories?

Task types are fixed for a given user. However, you can define and maintain personal categories for use in the HTML Task Manager during task creation.

20.2.3 Can You Close a Parent Service Request When the Task is Still Open?

The Restrict Closure flag on the task tab determines whether or not to allow the closure of a parent service request, when the task is open. If this check box is selected and the task status is open, meaning the status does not have the Closed flag checked, then the parent service request (SR) cannot be closed. Any task status without the Closed flag turned on is considered Open.

Part VII

Calendar

This part of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Implementing the HTML Calendar
- Implementing the Forms-based Calendar

21 Implementation Overview

This chapter provides an overview of the Calendar module implementation process.

21.1 Overview

The Calendar module contains two distinct functionalities. It can be used with other applications to help organizations in scheduling resources, or it can be used to help individual or group resources in managing daily activities and appointments. With these two different functionalities, implementing Calendar involves two separate setup procedures.

When Calendar is used for organizations in scheduling resources and assigning work shifts, the implementor or system administrator must define an appropriate calendar used for scheduling, define resource availability as work shifts, define resource unavailability as exceptions, assigning shifts and exceptions to a calendar, and then assigning resources to that calendar.

If Calendar is used to help individual or group resources in managing daily activities for personal or group calendars, then the implementor or system administrator must first integrate Calendar module by adding Calendar tab to an appropriate responsibility, create a calendar administrator who is responsible for new group calendar request approvals, create calendar general users, change calendar administrator if necessary, implement calendar events so that calendar events, such as marketing campaigns, can be displayed in the personal calendar in addition to appointments and tasks, set necessary profile options, and start workflow processes.

Therefore, before implementing Calendar, it is necessary to understand which functionality of Calendar in particular will be used in your organization. It can be distinguished by the Forms-based Calendar and HTML Calendar.

21.1.1 Forms-based and HTML Versions of Calendar

Calendar was initially a Forms-based application and used mainly for resource scheduling and work shift assignment. This includes defining and viewing available and unavailable times for an employee resource, as well as creating personal to-dos using Calendar Datebook functionality.

With the expansion of Calendar functionality, Calendar module includes an HTML version. But the functionality of the HTML version is different from the Forms-based Calendar. The HTML Calendar is used as a personal productivity tool to help individual or group resources in managing their daily activities and appointments. This includes creating appointments or tasks for an individual resource, a group or public calendar, inviting attendees for the appointments, and viewing scheduled appointments through calendar daily, weekly, monthly, combination, and yearly views.

As each version of the Calendar module contains different functionalities, the setup steps for each version require separate implementation procedures.

This chapter provides an overview of both the HTML and Forms-based Calendar implementation processes.

21.2 HTML Calendar Overview

Think of using the HTML Calendar as a personal productivity tool. Individual resources can use it to define and view personal daily activities and appointments. Users can create appointments, tasks or other calendar events, invite attendees for the appointment, and view scheduled activities through different calendar views.

In addition, the HTML Calendar provides an effective mechanism for users to manage group activities by using group or public calendars. Calendar users can request new group or public calendars and get request approvals from the Calendar Administrator. Once the request has been approved, the requestor of the new group calendar becomes the group calendar owner or Group Calendar Administrator of that group calendar and is responsible for any future approvals of that group calendar subscription requests.

To implement the HTML Calendar, implementors can embed the Calendar tab into an existing Oracle e-Business Suite module if necessary. The implementor or system administrator must then create a Calendar Administrator. The Calendar Administrator, typically a workflow administrator or system administrator, creates individual calendar users later and is responsible for approving or rejecting new group and public calendar requests as well as starting and stopping required workflow processes.

21.2.1 Setup Dependencies

To be able to use the full functionality of HTML Calendar, the following components must be set up properly:

- **HTML Task Manager**. Use HTML Task Manager to schedule appointments and tasks, and to create repeating appointments for meetings.
- **HTML Resource Manager**. Use HTML Resource Manager to retrieve individual resources for an appointment.
- **Oracle Workflow**. Use Oracle Workflow to send workflow notifications for processing new group calendar requests and subscription requests to existing group calendars.
- **HTML Tech Stack**. Use HTML Tech Stack to display the HTML functionality.

HTML Calendar also uses Accounts Receivable profile options to set the default client and server time zones for a user.

21.3 HTML Calendar Implementation Steps

This section provides an overview of the required steps for implementing HTML Calendar. Detailed instructions for these steps are contained in the subsequent chapters.

- Implementing the HTML Calendar
  - Adding a Calendar Tab to a Responsibility
  - Creating a Calendar Administrator
  - Creating a Calendar User
  - Changing a Calendar Administrator
  - Implementing Calendar Events
  - Setting Profile Options
  - Starting Workflow Processes
  - Running Concurrent Programs

21.3.0.1 Adding a Calendar Tab to a Responsibility

If the application that you want to integrate with HTML Calendar module already has a profile menu, then the implementor or system administrator can add calendar profile node "JTF HTML Calendar Profile Preferences" to their profile main menu. As a result, the Calendar tab will appear in the application user interfaces.

21.3.0.2 Creating a Calendar Administrator

After integrating HTML Calendar into your applications, the implementor or system administrator must identify one employee resource to become the Calendar Administrator. The Calendar Administrator has the privilege to grant approval or rejection to all new group and public calendar requests through workflow notifications.

Creating a Calendar Administrator involves several steps. This includes assigning appropriate responsibilities to the user who becomes the Calendar Administrator, associating the user with the "JTF HTML Calendar: Administrator" profile option, and assigning additional profile options to the user if the stand-alone HTML Calendar is used.

21.3.0.3 Creating a Calendar User

Every employee resource with appropriate responsibilities can use the HTML Calendar functionality to create appointments, view personal calendars, request new group or public calendars, and subscribe to an existing group calendar. Therefore, make sure that all employees exist in the Resource Manager and the resources are linked to the application login user names (FND_User). Otherwise, they need to be imported from Oracle Human Resource Management System (HRMS) into Resource Manager.

To create a Calendar user, the implementor, system administrator, or Calendar Administrator needs to grant appropriate responsibilities to the employee resource. In addition, if the stand-alone HTML Calendar is used, then the general user also needs to be associated with two profile options.

The Calendar Administrator also has the same responsibilities as a general user does, but with an additional System Administrator responsibility assigned to him. In addition, the Administrator needs to be tied to the JTF HTML Calendar: Administrator profile option in order to have the privilege to grant approval for new group or public calendar requests.

21.3.0.4 Changing a Calendar Administrator

Since the HTML Calendar allows only one Calendar Administrator in the system to be responsible for any new group or public calendar requests, in the case of the absence of the Calendar Administrator or other considerations, the Calendar

Administrator or whoever has the JTF_CALENDAR_ADMIN role can perform the update by changing the name.

After the update, the JTF_CALENDAR_ADMIN role is automatically assigned to the new Calendar Administrator, and is revoked from the old Calendar Administrator. Therefore, the new Calendar Administrator will receive all the new group calendar requests through workflow notifications.

21.3.0.5 Implementing Calendar Events

If an integrated application wants to display calendar events, such as marketing campaigns, in the personal calendars in addition to scheduled appointments and tasks, then the implementor or system administrator must perform required setup steps to implement this functionality. Calendar users who belong to resource groups to which the event is published must also set up their calendar personal preferences to be able to see the calendar events in their personal calendars.

21.3.0.6 Setting Profile Option

The implementor or system administrator must set required profile options for HTML Calendar, such as set the default time zone for end users or grant the calendar administrator group calendar request approval privilege. Some profile options enable HTML Calendar used as a stand-alone module.

21.3.0.7 Starting Workflow Processes

The implementor or system administrator must start the following two workflow processes in order to have the HTML Calendar work properly:

- JTF Calendar Workflows. Use JTF Calendar Workflow to track and route requests to the Calendar Administrator for new group and public calendar approvals and to Group Calendar Administrators (the owners of the group calendars) for subscription approvals.
- JTF Task Reminder. Use JTF Task Reminder to pick up appointment reminders for scheduled appointments.

21.3.0.8 Running the Concurrent Program

In order to retrieve new and updated appointments from quick find search, the system administrator must run the Rebuilding Intermedia Index for Task Names concurrent program periodically.

21.4 Forms-based Calendar Overview

Use the Forms-based Calendar to enter shifts and exceptions in order to define resource availability and unavailability, as well as to create personal To-Do List and view scheduled activities using Calendar Datebook functionality.

The resource work shift information defined here will be displayed as yellow background in the Gantt chart while using Assignment Manager for resource selection. Telesales applications use the Calendar Datebook functionality to view a resource's availability and assigned tasks.

To implement the Forms-based Calendar, implementors need to define a corporate calendar specifically used for resource scheduling, define resource availability as work shifts, define resource unavailability as exceptions, assigning shifts and exceptions to a calendar, and then assigning resources to that calendar.

21.4.1 Setup Dependencies

To be able to use the full functionality of the Forms-based Calendar, the following components must be set up properly:

- **Task Manager (Forms)**. Use Forms-based Task Manager to create personal Todo List (tasks) and to have tasks displayed in different calendar views. The functionalities of Todo List and calendar views reside in the Calendar Datebook and can be accessed through the Telesales application.
- **Resource Manager**. Use Resource Manager to retrieve a specific resource for different calendar views.

21.5 Forms-based Calendar Implementation Steps

This section provides an overview of the required steps for implementing the Forms-based Calendar. Detailed instructions for these steps are contained in the subsequent chapters.

- Implementing the Forms-based Calendar
  - Defining a Calendar
  - Defining Availability (Shifts)
  - Defining Unavailability (Exceptions)
  - Assigning a Shift to a Calendar
  - Assigning an Exception to a Calendar

- Assigning a Resource to a Calendar

21.5.0.1 Defining a Calendar

To be able to show resource work shift information, the implementor or system administrator must first define a calendar with start and end date information. Once the shifts and exceptions are specified, they can be associated with the calendar used specifically for resource scheduling.

21.5.0.2 Defining Availability (Shifts)

After defining a calendar, the implementor or system administrator needs to define work shift information indicating the beginning and ending time for a specific day within a week. Examples of a shift can be that a service engineer works from 7:00 a.m. to 4:00 p.m. on Monday, or from 8:00 a.m. to 3:00 p.m. from Tuesday through Friday.

Multiple shifts can be combined into a shift pattern for a longer period of time, such as from January 01, 2003 to May 31, 2003. After identifying shift information, implementors can then associate it with a specific calendar.

21.5.0.3 Defining Unavailability (Exceptions)

In addition to the available work hours, the Forms-based Calendar also allows implementors to schedule unavailable days as exceptions to regular working shifts. This exception information will then be associated with a specific calendar.

21.5.0.4 Assigning a Shift to a Calendar

After defining work shifts, the implementor or system administrator must assign them to a calendar. To assign them to a calendar, query up the calendar specifically used for scheduling resource, and then enter shift information.

21.5.0.5 Assigning an Exception to a Calendar

Use the same calendar that has work shift information to assign previously defined exceptions. As a result, this calendar will have both available and unavailable work information for a period of time.

21.5.0.6 Assigning Resources to a Calendar

After associating work shift and exception information to a calendar, the implementor can assign resources to it. In order to show the resource work shift information as yellow background in the Gantt chart while using the Assignment

Manager for resource selection, implementor or system administrator must indicate this calendar is the resource's Primary Calendar.

Resources of any categories defined in Resource Manager can be assigned to a calendar.

22

Implementing the HTML Calendar

This chapter covers the following topics:

- Adding a Calendar Tab to a Responsibility
- Creating a Calendar Administrator
- Creating a Calendar User
- Changing a Calendar Administrator
- Implementing Calendar Events
- Setting Profile Options
- Starting Workflow Processes
- Running Concurrent Program

22.1 Adding a Calendar tab to a Responsibility

HTML Calendar can be integrated with an existing application within Oracle e-Business Suite. After integration, a Calendar tab appears in the application user interfaces (UI).

If the application already has a profile menu, then the implementor or system administrator can add calendar profile node "JTF HTML Calendar Profile Preferences" to the application's profile main menu.

Perform the following steps in Forms to embed Calendar into an existing Oracle application.

Prerequisites

None

Responsibility

System Administrator

Navigation

Query up your root menu structure.

Steps

1. Attach menu JTF HTML Calendar Main Menu to your Main node along with profiles node.
2. Add JTF HTML Calendar Profile Preferences for the preferences structure.
3. Bounce the server to view your changes.

   The Calendar module is embedded and the tab is added to your user interface in the location you specified.

See Also

- Setting Profile Options
- Starting Workflow Processes
- Creating a Calendar Administrator
- Creating a Calendar User
- Changing a Calendar Administrator
- Running the Concurrent Program

22.2 Creating a Calendar Administrator

The Calendar Administrator, typically the system administrator or workflow administrator, has the privilege to grant approval or rejection to new group and public calendar requests. When new group or public calendar requests generated, the Calendar Administrator will receive workflow notifications for approval. Therefore, the user who will become the Calendar Administrator must exist in Oracle Human Resource Management System (HRMS) as an employee resource.

Use the following procedures to create a Calendar Administrator:

1. **Assigning Appropriate Responsibilities:**

After identifying an employee resource to become a Calendar Administrator, the implementor or system administrator must assign appropriate responsibilities to the employee. In order to receive notifications and create calendar general users, the Calendar Administrator must have the following responsibilities:

- System Administrator. Use this responsibility to grant the HTML Calendar access responsibilities to calendar general users.
- CRM Application Foundation User. Use this responsibility to access the HTML Calendar and HTML Resource Manager modules.

  Optionally, use the JTF HTML Calendar User responsibility if it is to access the HTML Calendar only.
- Workflow User Web Applications. Use this responsibility to verify workflow processes, and to view workflow notifications. If it is configured correctly, you can view these notifications from your personal homepage.
- Preferences (Oracle Self-Service Web Applications). Use this responsibility to define user preferences, for example, send or do not send e-mail notifications. To receive workflow notifications, select General Preferences and change the value in the “Send me electronic mail notifications” field to “Do not send me mail”. This tells the system not to send you e-mail notifications, but instead to send them to your notifications page.

2. **Associating the Calendar Administrator with Appropriate Profile Options**

After creating the Calendar Administrator, the implementor must set "JTF HTML Calendar: Administrator" profile option to the Calendar Administrator. This grants the profile option to the administrator, so that she or he can grant approval for new group and public calendar requests.

In addition, if the stand-alone HTML Calendar is used as default application and responsibility after signing on, then the following profile options also need to be assigned to the administrator:

- JTF_PROFILE_DEFAULT_RESPONSIBILITY (22946)
- JTF_PROFILE_DEFAULT_APPLICATION (690)

Perform the following steps in Forms to create a Calendar Administrator.

Prerequisites

The user must exist in Oracle HRMS as an employee resource.

Responsibility

System Administrator

Navigation

Navigate to **Security > User > Define**.

Steps

1. In the Users window, enter a user name for the Administrator.
2. Select the name for the Administrator in the person field.
3. Enter a password, then re-enter it again for confirmation.
4. Add appropriate responsibilities to the user.
5. Choose **File > Save** to save your changes. Close the window.
6. Associate the Calendar Administrator with the "JTF HTML Calendar: Administrator" profile option:
    a. Navigate to **Profile > System** to open the Find System Profiles Values window.
    b. Associate the profile option "JTF HTML Calendar: Administrator" to the user who will be the Calendar Administrator. Save your work.
7. (Optional) If using Calendar as a stand-alone module, then you must associate the Calendar Administrator with following additional profile options:
    a. JTF_PROFILE_DEFAULT_RESPONSIBILITY: Enter 22946 to set the default responsibility when using calendar as a stand-alone application.
    b. JTF_PROFILE_DEFAULT_APPLICATION: Enter 690 to set the default application when using calendar as a stand-alone application.
    c. Click **File > Save**.

See Also

- Setting Profile Options
- Starting Workflow Processes
- Adding a Calendar Tab to a Responsibility
- Creating a Calendar User
- Changing a Calendar Administrator

- Running the Concurrent Program

22.3 Creating a Calendar User

Every employee resource with appropriate responsibilities can use the HTML Calendar functionality to create appointments, view personal calendars, request new group or public calendars, and subscribe to an existing group calendar. Make sure that all employees exist in the Resource Manager and the resources are linked to the application login user names (FND_User). Otherwise, they need to be imported from Oracle Human Resource Management System (HRMS) into Resource Manager.

To create a Calendar user, the implementor, system administrator, or Calendar Administrator needs to grant the following responsibilities to the employee resource:

- CRM Application Foundation User. Use this responsibility to access the HTML Calendar and HTML Resource Manager modules.

  Optionally, use the JTF HTML Calendar User responsibility if it is to access the HTML Calendar only.

- Workflow User Web Applications. Use this responsibility to verify workflow processes, and to view workflow notifications regarding new group or public calendar requests, as well as existing group calendar subscription requests.

- Preferences (Oracle Self-Service Web Applications). Use this responsibility to define user preferences, for example, send or do not send e-mail notifications. To receive workflow notifications, select General Preferences and change the value in the “Send me electronic mail notifications” field to “Do not send me mail”. This tells the system not to send you e-mail notifications, but instead to send them to your notifications page.

Note: The Calendar Administrator also has the same responsibilities as a general user does, but with an additional System Administrator responsibility assigned to him. In addition, the Administrator needs to be tied to the JTF HTML Calendar: Administrator profile option in order to have the privilege to grant approval for new group or public calendar requests.

In addition, if the stand-alone HTML Calendar is used as default application and responsibility after signing on, then the following profile options also need to be assigned to the user:

- JTF_PROFILE_DEFAULT_RESPONSIBILITY (22946)
- JTF_PROFILE_DEFAULT_APPLICATION (690)

Perform the following steps in Forms to create a calendar user.

Prerequisites

The user must exist in Oracle HRMS as an employee resource.

Responsibility

System Administrator

Navigation

Navigate to **Security > User > Define**.

Steps

1. In the Users window, enter a user name.
2. Select the name in the Person field.
3. Enter a password, then re-enter it again for confirmation.
4. Add appropriate responsibilities to the employee resource.
5. Choose **File > Save** to save your changes. Close the window.
6. (Optional) If using Calendar as a stand-alone module, then you must associate the Calendar User with following profile options:
   a. Navigate to **Profile > System** to open the Find System Profiles Values window.
   b. JTF_PROFILE_DEFAULT_RESPONSIBILITY: Enter 22946 to set the default responsibility when using calendar as a stand-alone application.
   c. JTF_PROFILE_DEFAULT_APPLICATION: Enter 690 to set the default application when using calendar as a stand-alone application.
   d. Click **File > Save**.

See Also

- Setting Profile Options
- Starting Workflow Processes
- Adding a Calendar Tab to a Responsibility
- Creating a Calendar Administrator
- Changing a Calendar Administrator
- Running the Concurrent Program

22.4 Changing a Calendar Administrator

HTML Calendar allows only one Calendar Administrator in the system to be responsible for any new group or public calendar requests; therefore, in the case of the absence of the Calendar Administrator, the Calendar Administrator or whoever has the JTF_CALENDAR_ADMIN role can perform the update by changing the name in the Calendar Administration window.

The JTF_CALENDAR_ADMIN role can be assigned through the System Administrator Console by system administrator. A user without this role attempting to access the Calendar Administration window will see an error message saying that "You don't have sufficient privileges to view this page."

Once you update the Calendar Administrator, the JTF_CALENDAR_ADMIN role is automatically assigned to the new Calendar Administrator, and is revoked from the old Calendar Administrator. Therefore, the new Calendar Administrator can get access to the Calendar Administration window while the old Calendar Administrator cannot. All the new group calendar requests should be sent to the new Calendar Administrator through workflow notifications.

Assign JTF_CALENDAR_ADMIN Role to a User

To grant the JTF_CALENDAR_ADMIN role to a user, log in to the System Administrator Console as a system administrator. Select Users tab > Registration subtab > User Maintenance. Query up the user name and then click the Roles button to access the User-Role Mapping window. Select the JTF_CALENDAR_ADMIN role from the Available Roles block to move the role to the Assigned Roles block. Click the Update button to complete the change. The user will have access to the Calendar Administration window.

Perform the following steps to change the Calendar Administrator.

Note: For more information regarding the Preferences and Personal Profile links accessed through the profile icon, please see the *Oracle CRM System Administrator Console Concepts and Procedures Guide.*

Prerequisites

You must have the JTF_CALENDAR_ADMIN role to access the Calendar Administration window. This role is assigned to the user through the System Administrator Console. See the *Oracle Applications CRM System Administrator's Guide* for more information on defining user roles.

Responsibility

CRM Application Foundation User

System Administrator

Navigation

Navigate to the Calendar Administration window by clicking the **Profile** icon.

Steps

1. Click **Administrator** in the side navigation bar.

   The Calendar Administration window opens with the current Calendar Administrator information.

2. Clear the name field and enter a new name for the new Calendar Administrator. The resource's job title and e-mail information populates automatically.

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

   The value of "JTF HTML Calendar: Administrator" profile option is updated to the new resource name.

See Also

- Setting Profile Options
- Starting Workflow Processes
- Adding a Calendar Tab to a Responsibility
- Creating a Calendar Administrator

- Creating a Calendar User
- Running the Concurrent Program

22.5 Implementing Calendar Events

In addition to scheduled appointments and tasks, HTML Calendar provides the ability to allow users to view calendar events, such as campaigns, on their calendar views.

In order to use this functionality, the integrated applications have to perform the following tasks:

1. Identify resource groups to which they would like to publish events and add CALENDAR_ITEMS usage to the groups.
2. Make sure that business objects (known as events in calendar) that are published are valid JTF_OBJECTS with all the following metadata defined:
   - SELECT_NAME
   - SELECT_ID
   - FROM_TABLE
   - OBJECT_CODE
   - WHERE_CLAUSE
   - WEB_FUNCTION_NAME
   - WEB_FUNCTION_PARAMETERS
   - WEB_HTML_CALL
3. Populate the JTF_CAL_ITEMS_B table using the JTF_CAL_ITEMS_PUB API.

In order to view the calendar events in the personal calendars, calendar users must also meet the following conditions:

- Users must belong to resource groups to which the event is published.
- Users must have the "Display Events" set to yes in the calendar personal preference page from the Profile navigation link.
- Users must further personalize how these calendar items will be displayed in their personal calendars by selecting the desired color and prefix text.

This feature will work only when integrated applications implement the functionality and follow the required steps.

Oracle Marketing Online (OMO) is one of the applications that is currently implementing this functionality. Please refer to *Oracle Marketing Online Implementation Guide* for more details.

22.6 Setting Profile Options

The following table describes the profile options that are specific to the HTML Calendar.

Table 22–1 Calendar Profile Options

Name	Default Value	Level	Description	Outcome
JTF HTML Calendar: Administrator	No default value	Site	The JTF HTML Calendar: Administrator profile option sets the Calendar Administrator who grants approval and subscription requests for group and public calendars.	Set the value to the username of the calendar user who grants group and public calendar requests.
Client Timezone	America/ Los_ Angeles	Site	The Client Time zone profile option is used by Calendar to set the default time zone for the client in the Create Appointment window.	Set the value to the location where your appointments take place. Setting the time zone from the profile link in the Calendar UI is another way to set and update this profile value.

Table 22–1 Calendar Profile Options

Name	**Default Value**	**Level**	**Description**	**Outcome**
JTF HTML Calendar Task Span Days	No	Site	The JTF HTML Calendar Task Span Days profile option sets tasks that spans over more than one day to appear continuously across days on your personal calendar.	Set the profile option to **Yes** to have your tasks that span over more than one day to appear continuously across days on your personal calendar. If the value is set to **No**, the task shows as a memo for each day affected.
JTF_PROFILE_ DEFAULT_ RESPONSIBILITY	22946	User	The JTF_PROFILE_DEFAULT_ RESPONSIBILITY profile option sets the default responsibility when using calendar as a stand-alone application.	Set the value to correspond to the calendar user. The user value is 22946
JTF_PROFILE_ DEFAULT_ APPLICATION	690	User	The JTF_PROFILE_DEFAULT_ APPLICATION profile option sets the default application when using calendar as a stand-alone application.	Set the value to correspond to the calendar user. The user value is 690.

Note: See Appendix A, Profiles Options, for details on how these profile options can be set.

See Also

- Starting Workflow Processes
- Adding a Calendar Tab to a Responsibility
- Creating a Calendar Administrator
- Creating a Calendar User
- Changing a Calendar Administrator
- Running the Concurrent Program

22.7 Starting Workflow Processes

HTML Calendar uses the following workflow processes in order for it to work properly:

- JTF Calendar Workflows. Use JTF Calendar Workflow to track and route calendar requests to Calendar Administrator for new group and public calendar approvals and to Group Calendar Administrators, the owners of the group calendars, for existing group calendar subscription approvals. It also sends invitations for appointment invitees and attendees.
- JTF Task Reminder. Use JTF Task Reminder to pick up appointment reminders for scheduled appointments. For example, if "15 minutes Before" is selected from the Remind Me drop-down list while creating an appointment, then a user receives a workflow notification 15 minutes prior to the scheduled meeting starts.

> **Note:**
>
> - Refer to the *Oracle Workflow Administrator's Guide* to configure and monitor workflow.
> - If the concurrent manager is not up and running, workflow does not work correctly.

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Concurrent > Request**.

Steps

1. In the Find Request window, click **Submit a New Request**. The Submit a New Request window opens.
2. Select the Single Request option button and click **OK**. The Submit Request window opens.
3. Enter "Workflow Background Process" as the workflow process.

The parameters window opens.

a. Enter one of the following for the item type:

   * Enter "JTF Task Reminders" to start the workflow for task reminders.

   * Enter "JTF Calendar Workflows" to start the workflow process for group calendar approvals.

   The item type restricts this engine to activities associated with the item type you select.

b. Enter the Minimum and Maximum thresholds, in a hundredth of a second, which specifies the minimum and maximum costs that an activity must have for this background engine to execute.

c. Enter Yes for the Process Deferred, which specifies whether or not this background engine checks for deferred activities.

d. Enter Yes for the Process Timeout and click **OK**.

4. Click **Schedule** in the At these Times region.
5. Select the job to run periodically, in the Run the Job region.
6. Enter the start date and leave the end date blank to run the workflow indefinitely.
7. Define the interval which triggers the workflow to check for requests every specified minute, hour, day, week, or month and click **OK**.
8. Click **Yes** in the confirmation window if you selected for the workflow to run indefinitely.
9. Click **Submit** to confirm.
10. Click **No** to exit.
11. To stop the workflow process, query any workflows that are running and cancel the request.

See Also

- Adding a Calendar Tab to a Responsibility
- Creating a Calendar Administrator
- Creating a Calendar User
- Changing a Calendar Administrator

- Setting Profile Options
- Running the Concurrent Program

22.8 Running Concurrent Program

The Rebuilding Intermedia Index for Task Names concurrent program rebuilds the intermedia index so that a user can use the Quick Find to search for new and updated appointments and tasks. For more information on running this concurrent program, see the Running the Task Manager Concurrent Program documentation in the Task Manager section.

Guidelines

The following table describes the Rebuilding Intermedia Index for Task Names concurrent program.

Table 22–2 Task Manager Seeded Concurrent Programs

Name	Description	Frequency
Rebuilding Intermedia Index for Task Names	This program is used to rebuild the intermedia index so a user can use the quick find to search for new and updated tasks as well as to search by task name.	As needed

See Also

- Adding a Calendar Tab to a Responsibility
- Creating a Calendar Administrator
- Creating a Calendar User
- Changing a Calendar Administrator
- Setting Profile Options
- Starting Workflow Processes

23
Implementing the Forms-based Calendar

This chapter covers the following topics:

23.1 Defining a Calendar

To be able to show resource work shift information, the implementor or system administrator must define a calendar with start and end date information. For example, you can create a corporate calendar which runs from January 01, 2003 to December 31, 2003. Once the shifts and exceptions are specified, they can be associated with the calendar used specifically for resource scheduling.

Perform the following steps in Forms to define a calendar.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Calendar > Calendar Setup > Define Calendar**.

Steps

1. Enter a name for the calendar.
2. Select the type of calendar you want to create from the list of values (LOV). Options include, Corporate, Division, Group, Personal, and Team.
3. Enter a description for the calendar type.
4. Select the start and end dates from the LOV for your calendar.

   This defines how long your calendar is active
5. Click **Save**.

See Also

- Defining Availability
- Defining Unavailability (Exceptions)
- Assigning a Calendar to a Shift
- Assigning an Exception to a Calendar
- Assigning a Resource to a Calendar

23.2 Defining Availability

Use the define shift window to define available work hours. A shift is defined as the time a resource is available, and a shift pattern is the shift that extends for a longer period of time.

Examples of a shift can be that a service engineer works from 7:00 a.m. to 4:00 p.m. on Monday, or from 8:00 a.m. to 3:00 p.m. from Tuesday through Friday. A shift pattern for the service engineer is that she works from 7:00 a.m. to 4:00 p.m. on Monday and from 8:00 a.m. to 3:00 p.m. for Tuesday through Friday. This shift pattern can be defined from January 01, 2003 to May 31, 2003.

In addition, implementors can further specify if the shift is a regular or standby shift in the Availability Type field. After identifying shift information, implementors can then associate it with a specific calendar.

The shift information can be seen as yellow background displayed in the Gantt chart while using Assignment Manager for resource selection.

Note:

- Shift patterns cannot overlap.
- Begin time is expressed in hours and minutes and duration is expressed in decimals.

Perform the following steps in Forms to define shifts and shift patterns.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Calendar > Calendar Setup > Define Shifts**.

Steps

1. In the Define Shift window, enter a shift name.
2. Enter a description of the shift.
3. Enter the start and end dates for the duration of the shift.
4. Select the day of the week from the list of values (LOV) in the Shift Pattern region.
5. Enter the time the shift begins in the following format: 00:00.
6. Enter the duration of the shift in decimals where .25 = 15 minutes, .50 = 30 minutes, and .75 = 45 minutes.

   Information on the end of the shift, including the day and time, is automatically populated once you enter the shift duration.
7. Select the availability type from the LOV.
8. Save your work.

   Your shift pattern is saved to the database.

See Also

- Defining Unavailability (Exceptions)
- Defining a Calendar
- Assigning a Calendar to a Shift
- Assigning an Exception to a Calendar
- Assigning a Resource to a Calendar

23.3 Defining Unavailability (Exceptions)

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 in Forms to define non-availability.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Calendar > Calendar Setup > Define Exceptions**.

Steps

1. In the Exceptions window, enter a name for your non-available work time.
2. Select a category from the LOV. A category is a predefined type of exception.
3. Enter a description of your exception.
4. Define a start and end date for your exception.
5. Click **Save**.

   Your exception information is saved to the database.

See Also

- Defining Availability

- Defining a Calendar
- Assigning a Calendar to a Shift
- Assigning an Exception to a Calendar
- Assigning a Resource to a Calendar

23.4 Using the Assign Shift and Exceptions Window

You can use the Assign Shift and Exceptions window to perform the following actions:

- Assigning a Calendar to a Shift
- Assigning a Calendar to an Exception

23.5 Assigning a Calendar to a Shift

After defining work shifts, the implementor or system administrator must assign them to a calendar. To assign them to a calendar, query up the calendar specifically used for scheduling resource, and then enter shift information in the Shifts tab.

Perform the following steps in Forms to assign previously defined shift patterns to a specific calendar.

Prerequisites

You must first define your shifts and shift patterns.

Responsibility

CRM Administrator

Navigation

Navigate to **Calendar** > **Calendar Setup** > **Assign Shift/Exceptions**.

Steps

1. In the Assign Shift/Exceptions window, select the Shifts tab.
2. Enter a calendar name.
3. Enter the calendar type.
4. Enter the calendar description.

5. Enter the effective dates.
6. In the Shifts field, select your already defined shift from the list of values (LOV) and click **Save**.

See Also

- Defining Availability
- Defining Unavailability (Exceptions)
- Defining a Calendar
- Assigning an Exception to a Calendar
- Assigning a Resource to a Calendar

23.6 Assigning an Exception to a Calendar

Use the same calendar that has work shift information to assign previously defined exceptions. As a result, this calendar will have both available and unavailable work information for a period of time.

Perform the following steps in Forms to assign previously defined exceptions to a specific calendar.

Prerequisites

You must first define your non-available work hours (exceptions).

Responsibility

CRM Administrator

Navigation

Navigate to **Calendar > Calendar Setup > Assign Shift/Exceptions**.

Steps

1. In the Assign Shift/Exceptions window, select the Exceptions tab.
2. Select a calendar name from the list of values (LOV).
3. Select the Exception Tab.
4. Select the name of the calendar from the LOV.
5. Select the reason for the exception.

6. Enter the effective dates and click **Save**.

See Also

- Defining Availability
- Defining Unavailability (Exceptions)
- Defining a Calendar
- Assigning a Calendar to a Shift
- Assigning a Resource to a Calendar

23.7 Assigning a Resource to a Calendar

After associating work shift and exception information to a calendar, the implementor can assign resources to it.

In order to show the resource work shift information as yellow background in the Gantt chart while using the Assignment Manager for resource selection, implementor or system administrator must select YES in the Primary Calendar field. This is because only primary calendar will be considered for availability purposes.

Note: A resource can be assigned to many calendars, but can have only one primary calendar for a period of time.

Resources of any categories defined in Resource Manager can be assigned to a calendar.

Perform the following steps in Forms to assign a resource to a calendar.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Calendar > Calendar Setup > Assign Resources**.

Steps

1. Select the calendar name from the list of values (LOV).
2. Enter the calendar type.
3. Enter a description for the calendar.
4. Select the resource type from the drop-down list.
5. Enter the name of the resource.
6. If this is your primary calendar, set the primary calendar flag to **Yes**.
7. Enter the Effective Dates for the calendar and click **Save**.

See Also

- Defining Availability
- Defining Unavailability (Exceptions)
- Defining a Calendar
- Assigning a Calendar to a Shift
- Assigning an Exception to a Calendar

Part VIII

Escalation Manager

This part of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Implementation Tasks
- Troubleshooting Escalation Manager

24 Implementation Overview

This chapter provides an overview of the Escalation Manager implementation process.

24.1 Overview

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. A reactive escalation is in response to a customer complaint. Necessary action must be taken in response to the situation. This includes manually assigning escalation resources through Escalation Manager.

24.2 Steps

This section describes the order and process of implementing Escalation Manager in Forms.

24.2.1 Setting Profile Options

The Implementor identifies and sets specific profile options as required.

24.2.2 Starting the Background Workflow Process

The implementor starts the background workflow process to generate notifications for the designated contact when the escalation is created and the owner, escalation level, target date, or status is changed.

24.2.3 Defining a New Escalation Status

The implementor optionally defines a new escalation status. Escalation statuses are used to define the state of the escalation document.

24.2.4 Defining New Escalation Reference Types

The implementor optionally defines new reference types. These determine if a document is going to be escalated. Examples are open, closed or working.

24.2.5 Define New Escalation Reason Codes

The implementor optionally defines new escalation reason codes. Escalation reasons are used to specify why a source document is escalated.

24.2.6 Defining the New Escalation Contact Types

The implementor optionally defines escalation contact types. Escalation contact types are used to classify the category for contacts. For example, contacts can be employees or customers.

24.2.7 Defining the Escalation Level

The implementor optionally defines escalation levels that specify the levels of escalation severity.

25 Implementation Tasks for Escalation Manager

Note: There is no specific implementation order if you want to define new escalation reasons, levels, statuses, reference codes and contact types.

This chapter covers the following topics:

- Setting Profile Options
- Starting the Background Workflow Process
- Setting Escalation Status
- Setting Escalation Lookup Codes
  - Defining Escalation Reference Codes
  - Defining Escalation Reason Codes

25.1 Setting Profile Options

The first step in implementing Escalation Manager is to set the following profile options:

Table 25–1 Escalation Manager Profile Options

Name	Default Value	Level	Description	Outcome
Escalation: Close Only When De-escalated	Yes	Site	The escalation document cannot be closed (you cannot set up the escalation status to 'Close') without first changing the Escalation Level to 'De-escalated'.	If set to **Yes**, then it can regulate the escalation status change sequence from De-escalated to Close. If set to **No**, then it will not.
Escalation: Default Contact Type	Employee	Site	This profile option sets the default contact type to Employee in the Contacts tab.	You can also set it to **Customer**, and then it will default the contact type to Customer.
Escalation: Default Escalation Owner	Name	Site	This profile option sets the default escalation owner to a specific resource name, such as John Smith.	See description.
Escalation: Default Customer Contact Point	Phone	Site	This profile option sets the default customer contact point to Phone in the Contacts tab.	You can also set it to other values such as Cell, Email, Pager, or Web.
Escalation: Default Document Type	Task Manager	Site	This profile option sets the default document type to Task in the Document field on the Reference Document tab.	You can also set it to other values such as Service Request or Defects.
Escalation: Default Employee Contact Point	Work	Site	This profile option sets the default employee contact point to Work in the Contacts tab.	You can also set it to other values such as Home, Mobile, or Pager.
Escalation: Default Escalation Level	Level 1	Site	This profile option sets the default escalation level to Level 1.	You can also set it to other values such as Never Escalated, Level 2, or De-Escalated.
Escalation: Default Status	Open	Site	This profile option sets the default escalation Status field to Open.	You can also set it to other values such as Closed or Working.
Escalation: Default New Note Type	General Note	Site	This profile option sets the default note type to General Note if additional notes are attached to an escalation document.	You can also set it to other values such as Event or Approved.

Table 25–1 Escalation Manager Profile Options

Name	Default Value	Level	Description	Outcome
Escalation: Default Notify (Y/N)	Yes	Site	This profile option sets the default Notify check box to "checked" in the Contacts tab.	You can also set it to No, which will leave the check box "unchecked" in the Contacts tab.
Escalation: Default Reason Code	Slow Progress	Site	This profile option sets the default escalation Reason field to Slow Progress.	You can also set it to other values such as Unacceptable Solution, or Unresponsive Owner.
Escalation: Default Reference Type	Escalation	Site	This profile option sets the default escalation reference type to Escalation in the Reference Document tab.	You can also set it to other values such as For Your Information.

Note: See Appendix A, Profiles Options, for details on how these profile options can be set.

See Also

To change profile options and see detailed information, use the standard procedure outlined in Appendix A, Profile Options.

The following table describes Escalation Manager Profile Settings.

Table 25–2 Escalation Manager Profile Settings

Profile Option	Default Value
Escalation: Close Only When De-escalated	Yes
Escalation: Default Contact Type	Employee
Escalation: Default Escalation Owner	No default value
Escalation: Default Customer Contact Point	Phone
Escalation: Default Document Type	Task Manager
Escalation: Default Employee Contact Point	Work
Escalation: Default Escalation Level	Level 1
Escalation: Default Status	Open

Table 25–2 Escalation Manager Profile Settings

Profile Option	Default Value
Escalation: Default New Note Type	General Note
Escalation: Default Notify (Y/N)	Yes
Escalation: Default Reason Code	Slow Progress
Escalation: Default Reference Type	Escalation

25.2 Starting the Background Workflow Process

The next implementation step is to start the background workflow process listed in the following table to ensure proper operation of Escalation Manager.

Table 25–3 Escalation Manager Workflow

Workflow Name	Description	User
JTFEC	Reactive Escalation Notification	Escalation Manager

Use the following procedure to start the required background workflow process.

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to the Navigator - System Administrator window.

Steps

1. Select **Requests > Run.**

   The Submit a New Request window opens.

2. Select Single Request and click **OK**.
3. In the Submit Requests window, type **W** in the Name field and select **Enter** on your keyboard.

The Reports window opens and displays report names that begin with "w".

4. Select Workflow Background Process and click **OK**.

   The Parameters window opens.

5. Type "**re**" in the Item Type field and select **Enter** on the keyboard.

   The Item Type window opens and displays items that begin with the letters "re."

6. Select Reactive Escalation Notification and click **OK**.

   Leave the Minimum Threshold and Maximum Threshold fields empty.

7. Select **Yes** for both the Process Deferred and the Process Timeout fields and click **OK**.

8. Click **Schedule** on the Submit Request window.

9. Select **Run the Job...Periodically**.

   More options appear for defining the time period.

10. Define the Start Time and the End Time.

> **WARNING: Be sure to define an end time. If the end time field is blank, then the process runs indefinitely and cannot be shut off.**

11. In the Rerun Every fields, enter the number of minutes that defines the interval between job runs.

12. Select the From the Completion of the prior run box and click **OK**.

Guidelines

You must set up Notifications in Oracle Workflow to ensure that notifications are sent.

25.3 Setting Escalation Lookup Codes

Another required task in implementing Escalation Manager is to set lookup codes. The codes define the level, reason, contact type, and reference of an escalation. Escalation reasons are used to specify why a source document is escalated.

First set up the escalation reason code and enable it in the Application Object Library: Escalation Reasons Lookups window. Then, as a task or document is escalated, select this reason code from the list of values for the Reason field in the Escalations window.

- JTF_TASK_ESC_LEVEL
- JTF_TASK_REASON_CODE
- JTF_TASK_CONTACT_TYPE
- JTF_TASK_REFERENCE_CODES

Lookup Code JTF_TASK_ESC_LEVEL

The following table describes lookup code JTF_TASK_ESC_LEVEL, which describes escalation levels.

Table 25–4 Lookup Code JTF_TASK_ESC_LEVEL

Code	Description
DE	De-escalated
L1	Level 1
L2	Level 2
NE	Never escalated

Lookup Code JTF_TASK_REASON_CODE

The following table describes lookup code JTF_TASK_REASON_CODE, which describes escalation reasons.

Table 25–5 Lookup Code JTF_TASK_REASON

Code	Description
SLOW-PROG	Slow Progress
Unacceptable_Solution	Unacceptable Solution
UNRES_OWN	Unresponsive Owner
IMP_FAILING	Implementation Failing

Lookup Code JTF_TASK_CONTACT_TYPE

The following table describes lookup code JTF_TASK_CONTACT_TYPE, which describes contact types.

Table 25–6 Lookup Code JTF_TASK_CONTACT_TYPE

Code	Description
CUST	Customer
EMP	Employee

Lookup Code JTF_TASK_REFERENCE_CODES

The following table describes lookup code JTF_TASK_REFERENCE_CODES, which describes reference codes for the task.

Table 25–7 Lookup Code JTF_TASK_REFERENCE_CODES

Code	Description
ESC	Escalation
FYI	For Your Information

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Task and Escalation Manager > Setup.**
2. Select the appropriate lookup code.

   For example, select Define Escalation Reason to set the reason lookup codes.
3. Enter today’s date in the From field.
4. Leave the "To" field blank.
5. Select the Enabled check box to make it available.

6. Save your work.

25.4 Setting Up Escalation Status

There are three pre-defined Escalation Statuses:

- Open
- Working
- Closed

You may add your own user-defined statuses to these available statuses. Perform the following steps to add user-defined statuses.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Task and Escalation Manager > Setup > Define Escalation Status.**
2. Enter a user-defined status in a blank field in the Status column.
3. Enter a brief description of the status type in the Description field.
4. Enter the effective dates in the From and To fields.
5. Select escalation status flags.
6. Click the Save icon to finish defining the Escalation status.

References

The following table describes flags and definitions.

Table 25–8 Escalation Status Flag Definitions

Flag	Description
Assigned	Assigned to an individual
Working	In progress
Schedulable	Scheduled or re-schedulable
Accepted	Accepted by owner
Rejected	Rejected by owner
On Hold	Temporarily not active
Approved	Approved by management
Completed	Completed by owner
Cancelled	Cancelled by owner, creator, or management
Delete Allowed	Delete acceptable without cancellation
Closed	Completed and closed
Seeded	Pre-defined task status

25.5 Defining Escalation Reference Codes

A document or task can be combined with several other documents or tasks, such as when fulfilling a service request requires a series of tasks to be performed and related documents to be completed. In such a scenario, if one particular document or task needs to be escalated, the escalation might not apply to the other related items.

When you associate an Escalation Reference to the escalated item, you point to the other related items and indicate their relation. There are two pre-defined Escalation Reference types: FYI and Escalation.

- Use **FYI** (for your information) to indicate the task or document is related to the escalated item, but is not escalated.
- Use **Escalation** to indicate the task or document is related to the escalated item and also is escalated.

You can add other Escalation Reference types to your escalation references. Use the following procedure to define customized reference types.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Task and Escalation Manager > Setup > Define Reference Type.**

   The Application Object Library: Reference Codes for the Task Lookups window opens.

2. Enter the name of the new reference type in the first available row in the Code column.
3. Continue entering information in the remaining cells of the row to describe the escalation reference type and the effectivity dates.
4. Select the **Enabled** Check Box to make the escalation reference type available.
5. Save the new Escalation Reference and close the form.

25.6 Defining Escalation Reason Codes

You can add other escalation Reason Codes to customize your escalation reasons. Use the following procedure to define customized reason types.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Task and Escalation Manager > Setup > Define Escalation Reason.**

   The Application Object Library: Escalation Reasons Lookup window opens.

2. Select the first blank line.
3. Enter a code, meaning, and description.
4. Enter the effective dates in the From and To fields.
5. Select the Enabled flag.
6. Click the Save icon to finish defining the Escalation reason.

26

Troubleshooting Escalation Manager

This chapter covers the following topics:

- Troubleshooting Tips
- Error Messages

26.1 Troubleshooting Tips

If you are having difficulties using Escalation Manager after implementing it, verify the following:

- Workflow is installed and working correctly.
- Territories have been defined and contain valid resources.
- System Profile Options starting with "Escalation..." are set to valid values.

If Assisted Assignment through the Assignment Manager does not return any resources, then check whether or not the Escalated object itself has a resource.

26.2 Error Messages

This section contains information on some of the error messages associated with implementing Escalation Manager.

26.2.1 APP-JTF-210807

APP-JTF-210807 No Resources Found.

Cause: This message is often reported as a problem with Escalation Manager. This error can occur when assigning an escalation territory. You can define the territory, with the appropriate resources, then associate an escalation territory with that territory, and still the No Resources Found message appears. This happens most often because the object that is being escalated does not contain a territory itself.

Action: If no territory is available in the escalated object, then there is no way to locate the appropriate escalation territory, so that the resources cannot be found.

Refer to bug #1617608 for further details on debugging steps.

Part IX

Business Rule Monitor

This part of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Implementation Overview
- Implementation Tasks
- Troubleshooting Business Rule Monitor

27
Implementation Overview

This chapter provides an overview of the Business Rule Monitor implementation process.

27.1 Overview

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. Escalation management is comprised of two modules: Escalation Manager and the Business Rule Monitor. The Business Rule Monitor is the proactive process.

In a proactive escalation, you take the necessary action to monitor customers issues before the customer complains. 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.

27.2 Steps

The Business Rule Monitor is used to check active business rules by setting up an Oracle Workflow process which continuously loops and checks at a specified interval for all active business rules. This section provides a summary of the steps for implementing the Business Rule Monitor. Each step is performed in the Forms-based interface by the Implementor or the System Administrator.

27.2.1 Define the Business Rule Monitor Workflow Administrator

The Business Rule Monitor workflow administrator can receive workflow notifications when the business rule monitoring process starts and stops, as well as when errors are detected.

27.2.2 Set the Business Rule Monitor Workflow Administrator profile option

Before starting the business rule monitoring process, the Business Rule Monitor Workflow Administrator system profile option must be set and be linked to the E-Business suite Workflow Administrator.

27.2.3 Start the Background Processes

Before starting the business rule monitoring process, the background process for the Business Rule Monitor Main Process must be run. The following background processes are optional depending on which objects have active rules defined. Also, a background process should be started for any user-defined workflows that are being used.

- Business Rule Monitor Task Process
- Business Rule Monitor Service Request Process
- Business Rule Monitor Defect Process

27.2.4 Create a New Business Rule

The implementor or system administrator can optionally create a new rule by defining a rule's general information, specifying workflow and workflow attributes, and defining a rule's condition which reflect your business logic.

27.2.5 Enable the New Business Rule

Before monitoring your business rules, the implementor or system administrator must enable them by entering the effective dates in the Business Rule Workbench window.

27.2.6 Verify that an Escalation Territory has been created and contains at least one resource

Ensure that you have a resource assigned to an escalation territory. The escalation territory can be a catch all for all escalations. The resource needs to be a primary contact.

27.2.7 Start the Business Rule Monitor

The Business Rule Monitor is the control panel used to determine when the workflow process will run and stop.

28 Phase I: Configuring the Business Rule Monitor

This chapter covers the following topics:

28.1 Setting Up the Business Rule Monitor

The Business Rule Monitor is one of the modules in Escalation Management. It is considered "proactive escalation" in that you can create rules based on your business logic and set them in a workflow process which will periodically check them. When the business rule is violated, the BRM workflow puts the violated rule in a queue, where it is picked up by Oracle Workflow. If a rule is violated, then a notification will be generated. How is this done? The Business Rule Monitor is integrated with other applications and modules, such as Oracle Workflow. The user that owns this workflow process receives notifications when the process starts and stops, and also when errors are detected.

There are many dependencies which need to be set up prior to setting up the business rule monitor. Refer to the chapter "Before You Begin" for a list of dependencies.

28.2 Defining the Business Rule Monitor Workflow Administrator

A workflow process controls the Business Rule Monitor, which in turn periodically checks all the active business rules. The BRM workflow administrator, typically the system administrator or workflow administrator who owns the workflow process, receives notifications when the monitoring process starts and stops, and also when errors are detected. This is to ensure that an owner of the workflow process exists and that the notifications can be sent successfully.

You must first setup the BRM workflow administrator user and add the following responsibilities to the workflow administrator, so that the administrator can start the Business Rule Monitor and receive workflow notifications:

- **CRM Administrator responsibility**: The workflow administrator can access the Business Rule Monitor module through this responsibility. He can start the Business Rule Monitor and monitor the workflow process.
- **Workflow (Oracle Self-Service Web Applications)**: The workflow administrator can check the workflow processes, and can view workflow notifications from the customize link Worklist region if it is set up correctly in your personal homepage.
- **Preferences (Oracle Self-Service Web Applications)**: Use it to set up user preferences, for example, send or do not send e-mail notifications.

> **Note:** You can assign Workflow and Preferences responsibilities to many users, so that they can view workflow notifications if a business rule is violated and they are responsible for taking care of this automated escalation. However, there is only one BRM workflow administrator who will receive the notifications about when the monitoring process starts and stops, and also when errors are detected.

There are two types of notifications that can be sent through the Business Rule Monitor Main Process, to indicate the start and stop of the Business Rule Monitor, and any error conditions:

1. **Workflow Notification**: This type of notification can be viewed from the Worklist region if it is set up correctly in your personal homepage.

   To receive workflow notifications, select the Preferences responsibility. Then select General Preferences and change the value in the “Send me electronic mail notifications" field to "Do not send me mail". This tells the system not to send you e-mail notifications, but instead to send them to your notifications page.

2. **E-mail Notification**: This notification requires correct workflow and email server setup and is usually done by the system or workflow administrator. To receive e-mail notifications, select the Preferences responsibility. Then select General Preferences and finally select the appropriate value in the "Send me electronic mail notifications" field.

Prerequisites

The designated workflow owner must already exist in order to start the workflow process. If no workflow owner exists, then the account must first be created.

Responsibility

System Administrator

Navigation

Navigate to the Navigator - System Administrator window.

Steps

1. Navigate to **Security > User > Define**.
2. Enter an existing username in the Name field.
3. Enter a password in the Password field.

   Do not press Enter to move to the next field, you must move your cursor.
4. Enter the password again.
5. Select the Workflow Administrator responsibility from the List of Values (LOV) in the Responsibility field. This grants the responsibilities to the user.
6. Select the CRM Administrator responsibility from the LOV in the next Responsibility field.
7. Select the Preferences responsibility from the LOV in the next Responsibility field.
8. Select **File > Save**.

28.3 Setting Profile Options

The following table describes the profile options that are specific to the Business Rule Monitor.

Table 28–1 Business Rule Monitor Profile Options

Name	Default Value	Level	Description	Outcome
Business Rule Monitor Workflow Administrator	No Default Value	Site	This profile option must be set first in order to grant this profile option to the BRM Workflow Administrator.	The Administrator can receive workflow notifications when the monitoring process starts and stops, and also when errors are detected.

Note: See Appendix A, Profiles Options, for details on how these profile options can be set.

28.4 Starting the Background Workflow Processes

The Business Rule Monitor, like other Oracle Workflow process, needs to have its background processes started in order for it to run. This is done using the standard applications concurrent manager.

There are four predefined workflow item types. The Business Rule Monitor Main Process is the only one that is internal to the Business Rule Monitor. This process services the Business Rule Monitor looping workflow which itself checks all the active rules defined in the workbench and identify if any rule is violated.

The Business Rule Monitor Task Process is used when the violated business rule which is identified by the Business Rule Monitor Main Process is related to Task (object). This BRM Task process services the consequent activities based on the workflow information identified for the rule. For example, if the Escalate a Task (notification only) workflow is selected in the workbench for the rule, then a workflow notification will be sent automatically to the person identified in the workflow attributes window.

This is the same usage for the Business Rule Monitor Service Request Process and Business Rule Monitor Defect Process. The Business Rule Monitor Service Request Process is used when a violated rule is related to Service Request (object), and the

Business Rule Monitor Defect Process is used for a violated rule which is related to Defect (object).

These attributes are maintained within the Business Rule Workbench, and can be viewed by clicking the button next to the workflow field. The following table describes the seeded workflow processes.

Table 28–2 Seeded Workflow Processes

Item Types	Description
JTFBRM	Business Rule Monitor Main Process
JTFBRMDF	(Optional) Business Rule Monitor Defect Process
JTFBRMPR	(Optional) Business Rule Monitor Task Process
JTFBRMSR	(Optional) Business Rule Monitor Service Request Process

Proper operation of the Business Rule Monitor requires that the Business Rule Monitor Main Process be started before starting the Business Rule Monitor. Perform the following procedure to start these background processes. Additionally, the optional background workflow processes may be started if necessary.

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to the Navigator - System Administrator window.

Steps

1. Select **Requests > Run**.

   The Submit a New Request window opens.

2. Select Single Request and click **OK**.

3. In the Submit Requests window, type **W** in the Name field and select **Enter** on the keyboard.

   The Reports window opens and displays report names that begin with "w".

4. Select **Workflow Background Process** and click **OK**.
5. Type "**bu**" in the Item Type field and select **Enter** on the keyboard.

   The Item Type window opens and displays the four Workflow background processes required by the Business Rule Monitor.
6. Select one of the four Business Rule Monitor processes and click **OK**.

   Leave the Minimum Threshold and Maximum Threshold fields empty.
7. Enter **Yes** in the Process Deferred field, in the Process Timeout field, and the Process Stuck field and click **OK**.

   The Submit Request window appears in front.
8. Click **Schedule** on the Submit Request window.

   The Schedule window appears in front.
9. Select **Run the Job...Periodically**.

   More options appear for defining the time period.
10. Define the Start time and the End time. An end time of two hours after the start time is recommended.

WARNING: Be sure to define an end time. If the end time field is blank, then the process runs indefinitely and cannot be shut off.

---

11. In the Rerun Every field, enter the number of minutes that defines the interval between job runs. A rerun time of two minutes is recommended.
12. Select the From the Completion of the prior run box and click **OK**.
13. Repeat this entire procedure for any of the optional background workflow processes that you require, or for your own customized processes.

Guidelines

- If the four seeded background processes are not used, you still need to run the Business Rule Monitor Main Process, plus any of your own workflow processes that are used. Initially select some parameters and allow the background processes to run. Monitor their performance and tune the parameters as necessary to meet the needs of your enterprise.
- Remember to run your workflow processes periodically, for example, every 15 minutes throughout the expected duration of the Business Rule Monitor.

29

Phase II: Implementing Business Rules Using the Business Rule Monitor

This chapter covers the following topics:

29.1 Creating a New Business Rule

In addition to the seeded business rules provided with the Business Rule Monitor, you can define your own business rules. Use the following procedure to define a business rule.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Business Rule Monitor > Business Rule Workbench**.

2. Enter values for the following:
   - **Name**: The name of the new business rule.
   - **Object**: The object for which the rule will operate.
   - **Check Rule Every**: The time interval that you want.
   - **Effective**: Use the LOV to select the date to start the rule.

     Only put an end date to stop the rule.
   - **Owner**: Mandatory field.
   - **Workflow**: Chose a workflow from the drop down menu.

     Attributes can be defined for the Workflow and an Owner for the business rule.
3. Use the fields in the Simple tab to define conditions when the business rule is triggered.
4. Click **Validate** to check the syntax of the PL/SQL statement defined in the Simple tab. The syntax check verifies whether or not the syntax is correct.

   A dialog box confirms that the syntax validation was successful.
5. Click **OK.**
6. Click **Generate**.

   A dialog box confirms that your business rule has been generated.
7. Select **File > Save**.

Guidelines

- You can leave the Effective Dates field empty until the time you want to start the business rule. Once you enter the effective dates for your rule, you enable and start the rule.
- After defining a rule, specify its condition for your rule in SQL format. This can be done in either of the following tabs:
  – **Simple**: Use the Simple tab to make guided SQL statements by specifying the appropriate values for the necessary fields. For example, if your rule is defined for a task with Open status, then you need to select Status (Task) from the LOV in the Left Value field, “=“ in the Operator field, and “Open” from the Right Value field.

- **Complex**: Use the Complex tab if you are knowledgeable in SQL and want to directly write SQL statements.

See Also

Enabling a New Business Rule

29.2 Enabling a Business Rule

Before monitoring your business rules, you need to enable them first by entering the effective dates in the Business Rule Workbench window. Use the following procedure to first search for a rule, and then second, enable it.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Business Rule Monitor > Business Rule Workbench**.

   The Business Rule Workbench window opens.

2. Select **View > Find.**

3. Enter a name, an object, or other search criteria, and click **Find** to return to the Business Rule Workbench. Use the up or down arrow keys to select the rule that you want to use if there is more than one rule that matches your search criteria.

4. Enter the effective date in the Business Rule Workbench window.

5. Save your work.

Guidelines

If this rule has been generated and the Business Rule Monitor has been started, this rule will then be monitored from the effective date. If this rule has not been generated, you can click Generate to generate your business rules. If a business rule is generated without problems, a note message displays "Your Business Rule has been generated."

Note: The Generate button dynamically creates a view in the database. This view queries the objects that fit the conditions you have defined in the business rule and is used by the main BRM process when it checks the rule, to detect the objects that it needs to take action about.

29.3 Verifying an Escalation Territory

The automatic assignment and notification of escalations depends heavily on the Territory Manager module. So what happens if escalation territories are not there?

If the identity of a person who receives notifications defined in the Workflow Attributes window cannot be determined, then a notification is sent to the primary contact for the escalation territory associated with the source document owner's territory if the territory ID exists. If the territory ID does not exist, it is sent to the primary contact in the catch-all territory, or the Business Rule Owner.

Therefore, the system administrator needs to ensure that the correct structure of escalation territories or a catch-all territory is defined at installation time. Use the following procedure to verify an escalation territory.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Territory Manager > Territory Administration**.
2. Select **Administration > Search.**

   The Territory Search window opens.
3. Select your usage from the list of values in the Usage field.

4. Select **Escalations** from the Search Category field.
5. Click **Search**.

Guidelines

Refer to Using Territory Manager for details.

29.4 Starting the Business Rule Monitor

Use the Business Rule Monitor to monitor the workflow processes. Specify the time interval in the Control Panel region. This sets up an Oracle Workflow process which continuously loops and checks at a specified interval for all active business rules.

For example, suppose the Open Task business rule is defined to be checked every hour. Now, if the interval is set to five minutes and the Start button is selected, then the BRM starts the monitoring process. The main background process (Business Rule Monitor Main Process) services the Business Rule Monitor looping workflow which itself checks all the active rules, not just your Open Task rule, every five minutes to see which of the active rules are due to be checked. If it is less than one hour since the Open Task rule was checked last time, then this rule won't be checked until it is due. For those that are due, the BRM looping workflow then goes on to see if there are any objects that violate the rule. If a high priority task has stayed open for more than four hours, then this task will be identified. The appropriate background workflow process (such as Business Rule Monitor Task Process) is then performed to service the escalation activity workflow for that business rule. If the Escalate a Task (notification only) workflow is selected in the workbench, then the task owner will receive a workflow notification automatically. Perform the following procedure to start the Business Rule Monitor.

Prerequisites

Any workflow process that is used in the Business Rule Monitor must be started. If you have designed customized workflow background processes, then the background processes for these workflows must also be started. In addition, the *Business Rule Monitor Administrator* profile option must be set.

Responsibility

CRM Administrator

Navigation

Navigate to the Navigator - CRM Administrator window.

Steps

1. Select **Business Rule Monitor > Business Rule Monitor**.

   The Business Rule Monitor opens.

1. Enter the time period in the Interval field. Enter a time unit (minutes or hours) in the UOM field.
2. Click **Save.**
3. Click **Start** to activate the Business Rule Monitor.

   A dialog box confirms that the Business Rule Monitor started successfully.

4. Click Workflow Monitor to view details of this process.

Guidelines

After the monitor is started, the Stop button appears. Click **Stop** to stop the monitor.

Click **Refresh Status** to get an immediate status on the BRM main process.

30

Troubleshooting the Business Rule Monitor

This chapter covers the following topics:

- Troubleshooting Tips
- General Tips for Defining Rules
- Stopping the Business Rule Monitor
- Answers to Frequently Asked Questions (FAQs)

30.1 Troubleshooting Tips

If you are having difficulties using the Business Rule Monitor after implementing it, verify the following:

- The Concurrent Manager is running.
- Workflow background processes for all Escalation Workflows are running periodically.
- Oracle Workflow is installed and correctly running.
- Profile Option "Business Rule Monitor Workflow Administrator" is set to the Apps user ID of a valid user with the Workflow responsibility.
- Profile Option "Escalation: Default Level" is set to a value which exists in the Define Escalation Level form.

30.2 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.

30.3 Stopping the Business Rule Monitor

Some patches for CRM Foundation require the Business Rule Monitor to be stopped before the patch can continue. You can tell if the Business Rule Monitor is running by entering the CRM Administrator responsibility and navigating to Business Rule Monitor > Business Rule Monitor - this invokes the Control Panel. The Status field will show 'Active' or 'Stopping' if the Business Rule Monitor is in a running state.

To stop the Business Rule Monitor press the 'Stop' button on the Business Rule Monitor Control Panel. Note that the workflow background process for the 'Business Rule Monitor Main Process' workflow should be running in order for the 'Stop' command to be processed.

If the Business Rule Monitor Control Panel shows a status of 'Stopping' for an unusually long period of time, this is normally caused by the workflow background process not being running at the time the 'Stop' button is pressed. To start the workflow background process perform the following steps:

Steps

1. Select System Administrator responsibility from the Requests menu option.
2. Select Run.

3. Run a Single Request.
   a. The name is Workflow Background Process.
   b. The item type is Business Rule Monitor Main Process
   c. Leave min and max threshold blank.
   d. Process deferred to Yes.
   e. Process timeout to Yes.
4. Click ***OK***.
5. Select the Schedule button.
6. Select Periodically.
7. Enter an end date and time of 15 minutes later.
8. Re-run every three minutes.
9. From Completion of the prior run, click **OK**.
10. Select Submit.

- Note that if your Business Rule Monitor main process is running every 30 minutes, for example, then you will need to extend the end time of the background process so that it is still running the next time the BRM process checks for instructions.
- You then need to wait for the BRM to do its next run so that it will process the 'STOP' command, then the status should show 'Complete' and you can continue with the patch.
- You should not comment out this script and continue with the patch as this will leave your system in an undefined state.
- If for some reason the main BRM workflow will not process the 'STOP' command then you will need to abort the process from within the Workflow Monitor. To do this:
  a. Find the error notification for itemkey JTFBRM and the process ID that is shown on the BRM control screen: these notifications are usually sent to the SYSADMIN user.
  b. View the notification for this process.
  c. At the bottom of the screen there is a poplist from where you choose what you want to happen next, select **Abort**.

d. After a short while the process should stop.

30.4 Answers to Frequently Asked Questions (FAQs)

The following are frequently asked questions. Answers to these questions may help you in troubleshooting problems with the Business Rule Monitor.

30.4.1 What is the relationship between the following "Time Related Features"?

Answer: In Business Rule Monitor (BRM), you have the option to select how often (in <<Interval>> Field) you want the BRM to check the rules noted in Business Rule Workbench (BRW).

In BRW, you have option to select how often (in <<Check Rule Every>>, <<Tolerate Condition For>> Fields) you want the BRM to check the rule noted here.

In Workflow background process (WBP), you have option to select how often you want to run the workflow background process.

30.4.2 How Are The Parameters Discussed In Step 1 Related?

For example, you can set five minutes as the Interval in BRM, set one minute in Check Rule Every in BRW for one of the rules AND only run the Workflow background process every DAY, then what will happen?

Where is the point of reference for the time? If we run WBP at 12:00 pm, start the BRM at 12:05 pm, will the BRM continue to check every five minutes until … when 1:00 pm, or 5:00 pm or until whenever?

Answer: Be realistic when setting the time intervals as there is no cross-referencing between them, so all times are independent of each other.

In the example of having the BRM run every five minutes, the BR check every minute and the WBP run once a day, then the BRM will run once when the WBP 24-hour anniversary occurs each day. The checking of the actual BR will depend on when its WBP is next run after the BRM has run. The Workflow processes cannot do anything unless the WBP associated with that process is executed, so the timing of the BRM is dependant on when the WBP runs.

The point of reference for the BRM is when the 'Start' button was pressed in the Control screen. So if it is started at 12.00 pm to run every five minutes, then it will check at 12.00 pm, then at 12.05 pm, until the 'Stop' button is pressed OR until the WBP stops repeating. However, this is dependent on when the WBP is run for the BRM Main Process. If the WBP is run from 12.00 pm every one minute then the above will hold true. However, if it is run every two minutes then it will only check at 12.02 pm, 12:04 pm, 12:06 pm, and so forth, so the 12:05 pm run of the BRM will be delayed by a minute.

For each BR the timing is taken from when the last iteration of that BR occurred. This is affected also by the timing of the WBP for that individual BR Process, in the same way as the main BRM as explained above, plus the timing of the main BRM run and how it coincides with the timing of each BR check.

30.4.3 Can You Stop the Notifications From Repeating?

Once the conditions set in a Business Rule are met, then the notifications are sent continuously. Is this the intended functionality? Do you have the option to have a flag to indicate that only one notification should be sent?

Answer: If you choose to send a notification or create a Task, then that will happen each time the BR is checked if the condition is still true. This is as designed, you should set the BR interval to how often you want the notification to be sent. If you want to send the notification only once then you can either customize the Escalation Activity code to do that, or raise it as an Enhancement Request which will be considered for a future release.

30.4.4 Can You Expand the Fields Available From The 3D View?

In the BRW, you are limited to fields in the CS_BRM_3D_SERVICE_REQUEST_V view. For example, there is no problem code field in CS_BRM_3D_SERVICE_REQUEST_V. Is there an option to use fields from other tables or views?

Answer: The seeded 3D view makes available the fields that you see on the Service Request UI that are audited. You only use the fields that are audited because this is how you are able to detect how the values have changed over time. If you need additional fields then you can use the 'Complex' style of rule definition to specify these in standard SQL format.

30.4.5 How Do You Control Who Receives the Workflow Notifications?

When defining business rules, you have the ability to associate a Workflow process with each business rule. It is the Workflow process that generates the notifications.

The client can view the definition of these seeded workflow processes in the Workflow builder, however, it is not clear as to how the process determines whom the notifications should be sent to. For example, in the Workflow Builder, viewing the process definition of "Escalate a Service Request (notification only)", it has a notification activity called "Object Conformed to a Rule" which sends a notification to a role defined in the "Notification Person" item attribute.

What is the default behavior of this workflow process? What is the hierarchy of criteria that the system uses to determine who to notify?

Answer: Select the button labelled '...' which is next to the Workflow LOV. This brings up the Workflow Attributes window, and from there you can select a value for each of the attributes for that specific Workflow process. For example, for the notification workflow you can choose the Notification Role, which is the role of the (in relation to the object, i.e. Service Request) who you want the notification to go to. The options are:

- Business Owner
- Document Owner
- Document Owner's HR Manager
- Escalation Territory Primary Contact

The default setting is Business Owner, which is the owner of the Business Rule. If an individual resource cannot be identified programmatically for any reason, then the notification will always default to Business Owner.

30.4.6 Where Can I View the Workflow Process Launched by the BRM?

I want to see if anything is happening for the rule I created which has six records in the database that have matched criteria. I completed all the necessary preliminary set ups to get the BRM running.

Answer: Perform the following steps.

1. First check that the rule will actually return the records that you think it should. Do this by going to the Complex tab in the rule definition and copy the text into SQL*Plus. If it returns rows, then the rule is fine, if not then re-examine your rule. Start simply, such as 'Task Number' = '12345'.
2. If rows are returned, then next look at the Workflow processes using the Workflow Monitor. Ensure that the SYSADMIN user has 'Workflow' responsibility attached, then connect to Applications as SYSADMIN through the PHP login for the instance that you are using.
3. Under the heading 'Self Service', click **Workflow**.
4. At the next page click **View Progress**.

5. In 'Item Type' choose the name of the Workflow process that you believe should be invoked for your rule. For example, any of the Task seeded Workflow processes would use 'Business Rule Monitor Task Process'.
6. Click **Find**. All of the Workflow processes that have been started in that instance will be displayed. Drill down into the details of each process.
7. If there are none, there can be a problem with the main BRM Workflow. You can look at its progress using the same method, but select **Business Rule Monitor Main Process**.

It could be that there is a problem with the Workflow you are using, so again it is suggested that you try the simplest case first so that you can see it working. Try using the 'Escalate a Task - send a Notification' seeded Workflow and have the notification sent to the 'Business Rule Owner' or the 'Document Owner'.

Part X

User Management

This part of the Oracle Common Application Components Implementation Guide provides instructions for implementing User Management.

31

Introduction to Oracle User Management

This chapter provides a conceptual understanding of the User Management framework. Topics include:

- Overview
- User Types
- Enrollments
- Templates
- Approval Processes
- Access Control
- Self-service Registration
- Terms and Definitions

31.1 Overview

Oracle User Management is a highly extensible framework that automates many of the user registration and administration processes for an organization based on its business requirements. Because these processes are self-service enabled, users can complete many of their own registration tasks and different levels of administration can be handled by predefined resources or partners of an organization who are granted the appropriate roles and permissions. This reduces an organization's operating cost and its reliance on customer service agents who manually perform these tasks. Oracle User Management functionality is based on key concepts that include user types, enrollments, templates, approval processes, access control, and self-service registration. Once an organization has implemented Oracle User Management, it can automate the process for registering, approving, and maintaining different types of users, and for providing them with access to the appropriate applications. This chapter provides a conceptual explanation of Oracle User Management in the following topics:

31.2 User Types

User types are categories of users based on an organization's unique registration requirements. They provide a flexible, and extensible method of defining, categorizing, and implementing specific forms of user behavior. In addition, user types facilitate user self-service registration by enabling merchants to associate default roles, responsibilities, accounts, and registration templates with categories of users and to determine the appropriate approval process. All users that belong to a specific user type possess the same registration requirements and, if desired, are provided the same default application access with one responsibility and a range of security roles from none to several complex ones. They can sign up for and configure a set of enrollments and are required to participate in the same approval process. Oracle User Management contains three default user types: primary user, business user, and individual user. Information about each user that registers for one of these types is stored in the TCA, FND, and JTF schemas.

31.2.1 Primary User

The primary user is a business user and is also the primary contact for an organization. An individual belonging to this user type functions as customer administrator and is responsible for managing all users of the same user's organization. It is generally the first user to register an organization and does not require approval.

31.2.2 Business User

The business user is a typical B2B user associated with an organization. The business user is generally approved by one or more primary users of an organization or someone in the merchant organization. Business users can be granted Primary User privileges with the new Primary User enrollment.

31.2.3 Individual User

The individual user is a typical business-to-consumer (B2C) user that has no relationship to an organization. Approval is generally not required for individual users.

31.3 Enrollments

Enrollments are a set of add-on services that incrementally capture user data and grant users additional access privileges. Users can obtain enrollments during registration or after the approval process is completed. Enrollments typically grant a user access to an application, but can also enable the user to accept licensing terms, to provide surveys, and to sign up for parking permits or any other service. Enrollments can be tied to one or many user types, can be automatic, self-service, delegation only, or delegation and self-service, and may require an approval process. They correspond to a 0-1 responsibility and 0-many security roles and are optionally displayed in a user interface such as a JSP page.

31.3.1 Self-service Enrollments

Self-service enrollments are enrollments that a user manually assigns to itself as part of the registration process.

31.3.2 Automatic Enrollments

Automatic enrollments are automatically and transparently assigned to a user when the user registers for a specific user type. For example, an organization may wish to automatically assign primary users with access to specific accounts that are not available to other user types.

31.3.3 Delegation Only

Delegation only enrollments are assigned to users by an individual with the appropriate access privileges and never requires any approvers. This process only takes place at the delegating individual's discretion and users cannot sign up for these enrollments. An individual with the appropriate access privileges can also grant delegation privileges to other users. Users cannot use self-service registration to sign up for enrollments that are delegation only enrollments.

31.3.3.1 Required Roles

The delegation only enrollment is only available if:

- The administrator has granted the user all access roles associate with the enrollment.
- The delegation role is defined for the enrollment and the administrator has the delegation role.

31.3.4 Delegation and Self-service

Delegation and self-service enrollments can be assigned to a user by either of two methods. Users can sign up for these enrollments or an individual with the appropriate access privileges can assign them to users. If a user signs up for a self-service enrollment or is delegated an enrollment by an individual with insufficient access privileges, then the user must complete the approval process. If the enrollment is a delegation and self-service enrollment the it is always available in the UI as a choice for the administrator.

31.3.4.1 Required Roles

If the administrator has all of the required roles for an enrollment, then the administrator can grant users the enrollment without launching an approval process. If the administrator does not have all of the required roles for an enrollment, then the administrator can grant users the enrollment, however an approval process is launched and must be completed before it is granted to the user.

31.4 Templates

Templates are JSP pages that enable Oracle User Management to capture and retain information during the registration process. Each JSP page is associate with a Java class called a template handler, which captures the required information and writes it to the database. Each template is associated with one or more user types and enrollments.

31.5 Approval Processes

An approval process is a predefined series of steps required to approve user registration or service enrollment requests. They are associated with one-to-many user types and can be associated with one-to-many enrollments. Approval processes use Oracle Workflow for routing requests to the correct approvers and use email to send workflow notifications to the approvers. In addition, approval processes support time-outs and reminders. A request times out if it is left in an approvers queue for a specified amount of time. Users are sent email notifications once their requests have been approved or rejected. They will not be granted security roles or responsibilities until they have been approved.

31.5.1 Approval

An approval is an optional feature that enables approvers to reject or approve new user accounts. The System Administrator Console Users tab enables users to view, create, modify, delete, enable, and disable approvals, including those for specific organizations.

31.5.2 Approval Definition

An approval definition is the association of a user type or an enrollment with a workflow process, a default list of approvers, and optionally with an organization that overrides the list of approvers. It uses workflow to track and route an approval request to the approvers and to deliver an email notice to the approvers when required. If the approval definition has multiple approvers, then the email notification is sent to each successively to approve the request. The user is only granted the required access or enrollment after each approver has approved the request. Rejection is required from only one approver to deny the user the requested access or enrollment. If the order of the approvers changes, all pending requests are transferred back to the top of the new approver list. If the user type or enrollment is changed to use another approval definition, all pending request workflow processes terminate and a new workflow process is created and launched. If a user type or enrollment is modified and no longer requires an approval, then all pending requests are automatically approved.

31.5.3 Approval Flow

The approval flow is a predefined flow of steps required to approve user registration or service enrollment requests.

31.5.4 Approver Lists

An approver list is a group of one or more approvers associated with an approval definition. Each approval definition has a default approver list and can have separate approver lists defined for each organization that takes priority over the default list.

31.5.5 Approvers

Approvers are designated individuals who can modify user information and who can create and assign user accounts. Approvers with the CRM Primary User responsibility or access to the CRM System Administration Console can approve or reject user type and enrollment requests. Primary users can approve any request for their organization if approval group capability has been implemented in the system. Oracle User Management recognizes the following levels of approvers:

- System Administrators
- Primary Users
- Request Owners

31.5.5.1 System Administrators

System administrators, also referred to as merchant administrators, can accept or reject any requests in the system and can define a global or default list of approvers for each user type and enrollment. They can also supersede any decision made by other approvers in an organization. To approve requests, system administrators must be assigned the JTF_REG_APPROVAL permission.

31.5.5.2 Primary Users

Primary users can approve requests that are explicitly assigned to them, and can approve any requests for their organization if approval group capability has been implemented in the system. Primary users must be assigned the JTF_PRIMARY_USER_SUMMARY permission to approve pending requests and must be assigned the JTF_PRIMARY_USER responsibility to access the approval page.

31.5.5.3 Request Owner

Request owners, also known as approvers are generated by the approver list and the most current state of workflow defined for given approval. Request owners have the JTF_APPROVER permission and can only approve requests assigned to them.

31.5.6 Approval Groups

User Management enables a designated group of users to approve account requests. All members of this group can view and process the request and only one member of the group must approve the request. Once this occurs, the request, if applicable, is assigned to the next approver in the approval hierarchy.

31.6 Access Control

Oracle User Management provides a flexible and granular level of access control through its system of permissions, roles, and responsibilities.

31.6.1 Responsibilities

Responsibilities are groupings of application menus that determine the user interface accessible to a particular user. During the registration process, users are granted access to one or more responsibilities depending on the services in which they enroll and the merchant policy. Typically, individual users are given access to only one responsibility. Oracle User Management contains the following responsibilities:

31.6.1.1 CRM HTML Administration

The CRM HTML Administration responsibility provides access to the HTML System Administration console. Oracle User Management functionality, can be accessed by clicking the Users tab.

31.6.1.2 CRM User Management

The CRM User Management responsibility provides access to the Registration and Setup navigation links in the System Administration Console.

31.6.1.3 CRM Primary User

The CRM Primary User page provides access to the Home tab and Users tab in standalone mode. This responsibility does not provide access to any other tabs in the System Administrator Console.

31.6.2 Permissions

Permissions are specific types of access privileges that can be assigned to a user. A user can perform specific tasks if the user is assigned the required permissions. Oracle User Management contains the following permissions:

31.6.2.1 JTA_UM_SETUP

The JTA_UM_SETUP permission provides access to all Oracle User Management setup screens and should only be granted to administrators in the organization who are responsible for implementing the system.

31.6.2.2 JTA_UM_DELEGATION_ACCESS

The JTA_UM_DELEGATION_ACCESS permission displays the Delegation column with checkboxes in the Enrollment selection page. This permission is automatically assigned when a user is granted delegation privileges for the first time for an enrollment.

31.6.2.3 JTF_APPROVER

The JTF_APPROVER permission enables users to view and to approve requests that are assigned to them and to be approvers in the Approval Definition screen.

31.6.2.4 JTF_PRIMARY_USER_SUMMARY

The JTF_PRIMARY_USER_SUMMARY permission provides users with access to the User Maintenance and Pending Approvals page s, and enables them to query all users in their organization. Users who are assigned this permission can perform the following in the User Maintenance page:

- Disable user accounts thereby preventing users from logging in.
- Reset passwords.
- Change Account Assignments.
- View Enrollments.
- Revoke enrollments.
- Assign new enrollments.

Users who are assigned this permission can perform the following in the Pending Approvals page:

- View and approve all requests assigned to them.
- View and approve all requests for their organization if the approval group function has been implemented in the system.

31.6.2.5 JTF_REG_APPROVAL

The JTF_REG_APPROVAL permission provides system administrator capability for specific functions that include the ability to view and respond to all requests in the system independently of the person to whom they are assigned.

31.6.2.6 JTF_SECURITY_ASSIGN_ROLE

The JTF_SECURITY_ASSIGN_ROLE permission provides system administrator capability for specific functions that include the ability to query any users and to change their details, to assign accounts, to manage enrollments, and pending approvals from the Pending Approvals link in the main navigation bar, to reset passwords, and to disable user access.

31.6.3 Roles

Roles are groupings of permissions, which are page level or function level granular privileges used to maintain application security. A single user can be granted several roles, each of which separately determines access rights to the user interface details, the ability to perform certain transactions and the ability to access certain data sets. During the registration process, users are granted the appropriate set of roles that map to their job function. Although Oracle User Management contains the following predefined roles, users with the appropriate access privileges can also create and customize their own roles.

31.6.3.1 JTA_UM_DELEGATION_ACCESS

The JTA_UM_DELEGATION_ACCESS role is assigned the JTA_UM_DELEGATION_ACCESS permission and provides users with all of the access privileges associated with this permission.

31.6.3.2 JTA_UM_SETUP_ADMIN

The JTA_UM_SETUP_ADMIN role is assigned the JTA_UM_SETUP permission and provides users with all of the access privileges associated with this permission.

31.6.3.3 JTF_APPROVER

The JTF_APPROVER role is assigned the JTF_APPROVER permission and provides users with all access privileges associated with this permission.

31.6.3.4 JTF_PRIMARY_USER

The JTF_PRIMARY_USER role is assigned the JTF_PRIMARY_USER_SUMMARY permission and provides users with all access privileges associated with this permission.

31.6.3.5 JTF_SYSTEM_ADMIN_ROLE

The JTF_SYSTEM_ADMIN role is the global system administration role and contains all permissions required to access and operate the System Administration Console including JTF_SECURITY_ASSIGN_ROLE and JTA_UM_SETUP.

31.7 Self-Service Registration

Self-service registration is a user interface and set of background processes that enable users to perform their own registration tasks instead of doing so through an administrator. This feature reduces an organization’s operating costs and removes registration restrictions that are based on the availability of an administrator.

31.7.1 Registration

Registration is the process that provides users with access to some or all of an application’s functionality.

31.7.2 Registration Self-service Administration UI

The Registration Self-service Administration UI is a user interface that enables system administrators, and designated primary users, to maintain users, parties, and accounts for an external organization or an internal group.

31.7.3 Registration Self-service User UI

The Registration Self-service user UI is a user interface that enables self-registration for primary, individual, or business users.

31.8 Terms and Definitions

This section contains additional terms and definitions that are essential to understanding Oracle User Management.

31.8.1 Customers

Customers are individuals who are external to the implementing organization and who use but do not implement the Oracle e-Business Suite.

31.8.2 Java Server Pages (JSPs)

JSPs are an extension to the Java servlet technology that was developed by Sun as an alternative to Microsoft's ASPs (Active Server Pages). JSPs have dynamic scripting capability that works in tandem with HTML code, separating the page logic from the static elements — the actual design and display of the page. Many of the Oracle User Management configuration and management tasks are performed using a HTML interface composed of JSPs.

31.8.3 Merchants

Merchants implement the Oracle e-Business Suite and should not be confused with “customers” who use the Oracle e-Business Suite.

31.8.4 Users

Users are individuals who require partial or complete access to one or more applications in the Oracle e-Business suite.

31.8.5 Workflow

Oracle Workflow automates and continuously improves business processes, routing information of any type according to business rules you can change. 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 may request a response
- a business event
- a subflow that itself is made up of many activities.

32

Implementation Tasks for User Management

This chapter provides instructions for implementing the User Management Framework. Topics include:

32.1 Introduction

The Users tab in the System Administration Console provides functionality for setting up the User Management framework and for registering users. The Setup menu in the main navigation bar enables administrators to implement User Management by creating and managing approvals, enrollments, user types, and templates. This chapter provides instructions for implementing User Management including the steps performed in the Setup Menu of the Users tab. The Registration menu in the main navigation bar enables administrators to manage approvals, and to setup, modify, or delete users. Instructions for performing these tasks are contained in the User Management chapter of the Oracle Common Application Components User's Guide.

32.2 Creating the User Management Administrative User

To access the System Administrator Console and perform certain User Management administrative functions, a user must be a system administrator or an administrative user with the appropriate responsibilities and roles. This section provides instructions for creating a User Management administrative user and assigning it the appropriate responsibilities and roles. The steps for creating the User Management administrative user are performed in the HTML and Forms-based interfaces.

Note: Because the Forms-based interface does not generate party information you should first perform the required steps for creating the User Management Administrative User in the HTML interface and then complete the process using the Forms-based interface.

Prerequisites

None

Responsibility

System Administrator

Navigation

Log in to the Forms and HTML interfaces as required.

Steps in HTML

1. Log on to the System Administrator Console as a System Administrator.
2. Click the Users tab and then click User Maintenance on the side navigation bar.
3. Enter the user name in the search field and Select **Go**.
4. Select the user name and then select **Roles**
5. Assign the required roles to the administrative user, select **Update**, and exit the System Administrator Console:
   a. JTA_UM_SETUP_ADMIN (for access to the setup screens)

b. JTF_APPROVER (for access to the approval screens)

Steps in Forms

1. Log in to the Forms interface with System Administrator responsibility and choose **Security>User>Define**.
2. Enter a user name and password in the Users window.
3. Add either of the following responsibilities, save your work, and exit the Forms interface:
   - CRM HTML Administration
   - CRM User Management

> **Note:** Responsibilities determine which pages a user can access and roles determine which functions the user can perform in those pages. If you do not assign appropriate roles to the user, then it will not be able to perform the required function even with the appropriate access to the page.

32.3 Setting Profile Options

The first step in implementing User Management is to set the appropriate values for the User Management profile options. Profile options determine a wide range of User Management functionality. Appendix A: Profile Options contains detailed instructions for setting profile options. The following table lists the User Management profile options:

Table 32–1 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTF_PRIMARY_USER	sysadmin	Site	Predetermines the username that corresponds with the "Universal Approver".	The supplied username corresponds to the Universal Approver.
JTF_INDIVIDUALUSER_ACCOUNT	Yes	Site	Enables automatic account creation for newly registered users.	When set to **Yes**, automatically creates a new account in the HZ_CUST_ACCOUNTS table for a newly registered user and associates the user with the account. Users must have an account to buy products in the iStore.
JTA_UM_APPLICATION_URL	None	Site	Specifies the application logon URL sent to users in email messages that are automatically generated once a user request has been approved.	The supplied URL is sent to users in email messages that are automatically generated once a user request has been approved.
JTA_UM_WORKFLOW_OWNER	sysadmin	Site	When a workflow is launched it always identifies the user who launched it. The system administrator is the default User Management workflow owner. User Management uses workflow for registration and for resetting passwords. Users can query workflows using the name of the workflow owner.	Specifies the name of the workflow owner.
JTA_UM_SENDER	None	Site	Provides a sender clause for automatically generated email messages such as approval and password expiration notifications.	Provides a sender clause for automatically generated email messages such as approval and password expiration notifications.

Table 32–1 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTF_UM_ APPROVAL_ OWNER	sysadmin	Site	.Defines the individual who serves as an escalation point of contact and who receives and approval request when the last approver fails to approve the request.	This profile option is used in the approval process. If the last approver in a predefined approval definition fails to approve a request, the person defined in this profile option will be the escalation point of contact and will receive the request. The user specified as the value for this profile option must have the JTF_SECURITY_ ASSIGN_ROLE permission
JTF_UM_ APPROVAL_ TIMEOUT_MINS	1440 Minutes (one day)	Site	Defines (in minutes) how long a workflow notification remains in a queue before it is timed out.	When the notification times-out, the request goes to the next approver on the list. If no approver is specified, the approval owner receives and answers the request. If you enter 0 as the default, no time out occurs. If no value is set, the profile option is defaulted to 0. The Process Time-out field in the parameters window when starting the "JTF Approval" workflow must be set to Yes for this profile option value to take affect.
JTF_UM_ APPROVAL_URL	None	Site	Defines the user application logon URL.	The URL is included in the workflow notification sent to each approver when they are assigned a request. The approver is sent an email message stating that the approver must approve a request.

Table 32–1 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTF_UM_ MERCHANT_ NAME	None	Site	Defines the name of your organization.	Workflow inserts this name into request approval and rejection notifications when they are sent to the user.
JTF_ REGISTRATION_ CACHE	Yes	Site	Determines whether the registration pages will cache the data entered by the user during the registration flow.	If set to **Yes** and if the user presses the browser "Back" button, then the data entered on the previous page is available. If set to **No**, then the data (page) expires as soon as the user leaves the page.
ICX: Language	American English	Site	The ICX: Language profile can be set at the user level and determines the language displayed for the user when logging in.	The language for the registration page accessed from the "Register Here" link of the login page is determined by the ICX Language profile set for the "Guest User" defined in the System Administration console. To change the language for this page access the ICX: Language profile option, click the User field, and choose a language from the LOV.
JTA_UM_REG_ ORG_FAX_REQD	Yes	Site	Provides Yes/No values in the registration page that determine whether or not an organization's fax information is required.	The Organization Information page changes its required options depending on the values set for this profile option, however the fax field remains optional in the user detail page regardless of how this profile option is set.

Table 32–1 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTA_UM_REG_ ORG_PHONE_ REQD	Yes	Site	Provides Yes/No values in the registration page that determine whether or not an organization's phone information is required.	The Organization Information page changes its required options depending on the values set for this profile option, however the phone field remains optional in the user detail page regardless of how this profile option is set.
JTA_UM_HIDE_ QUICKFIND	No	Site	Optionally hides the Quickfind menu.	When set to **Yes**, this profile option hides the Quickfind menu from users. When set to No, the Quickfind menu appears. The profile option is set to **No**, to ensure compatibility with previous versions of User Management that did not contain this feature.
SIGNON_ PASSWORD_ LENGTH	5	Site	Specifies the number of characters required to constitute a valid password.	Specifies the number of characters required to constitute a valid password.
JTA_UM_ PASSWORD_GEN_ WKF	JTAUMPS W	All	Specifies the name of the workflow used for sending passwords to users.	Specifies the name of the workflow used for sending passwords to users.

Table 32–1 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTA_UM_SUPPORT_CONTACT	Null	Responsibility	Specifies the name or email address of the support person to contact in case of logging errors.	Specifies the name or email address of the support person to contact in case of logging errors.
JTF_UM_EMAIL_AS_USERNAME	No	Site	Optionally disables the User ID field in the registration screen and enables the user's email address to also function as the user ID.	When set to **Yes**, this profile option disables the User ID field in the registration screen and enables the user's email address to also function as the user ID. During the registration process, User Management populates the USER_ID column in the FND_USER table with the user's email address. When set to **No**, this profile option retains both User ID field in the registration screen and consequently does not populates the USER_ID column in the FND_USER table with the user's email address.

Table 32–1 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTA_UM_DEFAULT_ ADDRESS_STYLE	US	Site	Determines the default country whose specific style of address fields must be displayed in the company registration page and user details page. When a user registers for the first time, the user must choose a country before entering address information. The country specified by this profile option appears by default. If User Management does not contain seeded data for the required country, then you must setup the address style using the Accounts Receivable flex fields. For instructions on configuring flexible address fields, see the Chapter 3 of the *Oracle Receivables User Guide*.	When the profile option is set for a specific country then the address fields required by that country's address style appear in the company registration page, and user details page. If the profile option is not set for a specific country of if there is an error displaying that country's address style then the registration and user details pages default to the U.S. address style. The registration process cannot be completed unless information is entered in mandatory address fields. The mandatory definition can be turned on or off for a given field from the flexfield segment definition, as a single address field maps to a segment of the address flexfield.

32.4 Setting Up Workflow

User Management uses workflow to track and route approval requests and to send notifications to approvers. The default workflow JTF APPROVER retrieves the first approver from the hierarchy list and notifies the approver. When the approver approves the request, Workflow searches for the next required approver and continues this process until all approvers approve the request, or the request is rejected. Workflow items are sent to an approvers worklist and email address. For user types, the approver receives a URL in their notification that provides access to the Pending Approvals window.

Note: Email notification will only be sent if the Workflow mailer is setup and configured properly. The PHP / Self Service Workflow notifications page can also be used to view notifications. Please refer to the Workflow documentation for more information on how to start and configure the workflow mailer. If the concurrent manager is not up and running, workflow does not work correctly.

For information instructions on setting up Workflow, see the following:

- Starting the Workflow Process
- Stopping the Workflow Process

32.5 Starting the Workflow Process

Note: Refer to the *Oracle Workflow Administrator's Guide* for instructions on setting up and monitoring workflow.

Perform the following steps to start the Workflow process.

Prerequisites

See the *Oracle Workflow Administrator's Guide* for more information.

Responsibility

System Administrator

Navigation

Log in to the navigator of the Forms-based application, select **Concurrent>Request**.

Steps

1. Click **Submit a New Request** and in the resulting window, select the Single Request option button and click **OK**.
2. Enter the name of the workflow process as "Workflow Background Process." Workflows must be defined in the approval setup. Oracle is shipping one seeded workflow out-of-the-box, JTFAPPROVAL workflow
3. Perform the following in the Parameters window:

a. Enter JTF_APPROVAL or the workflow you want to start as the Item Type. This must be defined as an approval type in the approval definition set in the System Administrator User tab.

b. Enter the Minimum and Maximum thresholds which specifies the minimum and maximum costs that an activity must have for this background engine to execute it, in a hundredth of a second.

c. Enter No for the Process Deferred, which specifies whether this background engine checks for deferred activities.

d. Enter Yes for Process Timeout and click **OK**.

   If this is set to No, the workflow process ignores the JTF_UM_APPROVAL_TIMEOUT profile option

4. Click **Schedule** next to the At these times option, region.
5. Select the job to run the job periodically, in the Run the Job region.
6. Enter the start date and leave the end date blank to run the workflow indefinitely.
7. Define the interval which triggers the workflow to check for requests every specified minute, hour, day, week, or month and click **OK**.
8. Click **Yes** in the confirmation window if you selected for the workflow to run indefinitely, then click **Submit** to confirm, and click **No** to exit.

32.6 Stopping the Workflow Process

Perform the following steps to stop the workflow process.

Prerequisites

- A workflow must be running.
- See the *Oracle Workflow Administrator's Guide* for more information.

Responsibility

System Administrator

Navigation

Log in to the navigator of the Forms-based application, select **Concurrent>Request**.

Steps

Query any workflows that are running and cancel the request.

32.7 Setting Up Approvals

An approval is an optional feature that enables approvers to reject or approve new user accounts. The System Administrator Console Users tab enables users to view, create, modify, delete, enable, and disable approvals, including those for specific organizations. For instructions on setting up approvals, see the following:

- Creating a New Approval
- Removing an Approval
- Searching for an Approval
- Editing an Approval's Details
- Enabling and Disabling Approval
- Updating Approval Preferences for an Organization

32.8 Creating a New Approval

Perform the following steps to create a new approval. In some cases an approval may generate an exception. When this occurs, an error window is generated that displays a default workflow error message and the workflow description.

Prerequisites

None

WARNING: The Use Pending Request Page check box should only be unchecked if your organization does not plan to use User Management's pending approval window and intends to respond to all approvals through emails and the workflow notification window.

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Approval Setup and click the **Create New Approval** button.

Steps

1. Enter the following approval information and click **Next**:
   - Approval key
   - Approval name
   - Description
   - Select a Workflow Item Type from the drop-down list.
   - Select an Application from the drop-down list.
   - (Optional) Select the **Use Pending Request Page** check box if you want the approval to display during the registration process from the "Register Here" link.
2. Enter the following Approver Selection information, click **Add User** and then click **Save**:
   - Enter a number to define the order that each approver gets the request.
   - Enter the name of the first approver into the Approver1 field or click **Go** to search for an approvers name.

32.9 Removing an Approval

Perform the following steps to remove an approval.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Approval Setup

Steps

1. Select the check box in the Remove column that corresponds to the Approval that you plan to delete.
2. Click **Update** to delete the Approval or click **Restore** to reset the original values in the window.
3. In the resulting window, click **Confirm and Update Now** to delete the Approval or click **Cancel** to cancel the deletion.

32.10 Searching for an approval

Perform the following steps to search for an approval.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Approval Setup

Steps

1. Select the Approval Name or Approval Key options from the Search Approval menu.
2. Enter your search criteria in the adjacent field and click **Go**.

32.11 Editing an Approval Details

Perform the following steps to edit an approval's details.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Approval Setup

Steps

1. Click the name of the approval in the Approval Name column.
2. Edit the fields as desired and click **Next**.
3. Edit the information in the Update Approval window and click **Next**.
4. Edit the information in the approver selection order window and click **Submit**.

32.12 Enabling and Disabling Approval Definitions

Perform the following steps to enable or disable an approval definitions.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation
In the System Administrator Console, navigate to Users>Setup>Approval Setup

Steps
1. If you want to enable an approval, select **Enabled** from the drop-down list in the corresponding Status column.
2. If you want to disable an approval, select **Disabled** from the drop-down list in the corresponding Status column.
3. Click **Update** to modify the status of the approval or click **Restore** to reset the original values in the window.

   A confirmation window opens.
4. Click **Confirm and Update All** to modify the status.

32.13 Updating Approval Preferences for an Organization
Perform the following steps to update approval preferences for an organization.

Prerequisites
None

Responsibility
CRM HTML Administration or CRM User Management

Role
JTA_UM_SETUP_ADMIN

Navigation
In the System Administrator Console, navigate to Users>Setup>Approval Setup>Organization

Steps
1. Select Organization Name or Company Number from the Enter Search Criterion drop-down list.
2. Enter a minimum of three characters into to the search field.

   The "%" and "_" (underscore) symbols are wildcards.

3. Click **Go**.

   A list of search results appears in the window.

4. Click the column heading to sort the row.
5. Click the Organization Name.

   The Approval Preferences window opens with a list of approval definitions for the specified organization.

6. Click the approval list that you want to update.
7. Enter the Approver Selection information:
   a. Enter a number to define the order that each approver gets the request.
   b. Enter the name of the first approver into the Approver1 field or click **Go** to search for an approvers name.
   c. Enter your search criteria and click **Go**.
   d. Select the option button for the user that you want to be the approver and click **Add User**.
   e. (Optional) Enter the name of additional approvers into the other Approver fields (repeat steps a-e).
   f. (Optional) Click **Cancel** to clear the fields.
   g. (Optional) Click **add 5 more rows** to add five empty approver fields.
8. Click **Submit** to save.

32.14 Setting Up Templates

Templates are JSP pages that enable User Management to capture and retain information during the registration process. Each JSP page is associate with a Java class called a template handler, which captures the required information and writes it to the database. Each template is associated with one or more user types and enrollments. For instructions on setting up templates, see the following:

- Creating a Template
- Removing a Template
- Enabling and Disabling Template Definitions
- Editing a Template's Details

- Searching for a Template

32.15 Creating a Template

Perform the following steps to create a template.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Templates and click **Create New Template**.

Steps

1. Enter the following required information.
   a. Enter the template key.
   b. Enter a name for the template.
   c. (Optional) Enter a description for the template.
   d. Select a template type from the drop-down list. Options include user type template or enrollment template.
   e. Enter the name of the template handler. The template handler is a java class implemented by the application to handle the registration data at runtime.
   f. Enter the name of JSP page that is the first window of the template flow into the Page Name field. The extension of the window must be ".jsp".
   g. Select an application from the drop-down list.
2. (Optional) Click **Reset** to clear the fields.
3. Click **Create** to save your information.

32.16 Removing a Template

Perform the following steps to delete a template.

Prerequisites

None

A template is an application-specific set of JSPs that you can use to customize the user registration process. There are two template categories, user types and enrollments. Perform the following steps to create a template.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Templates.

Steps

1. Select the check box in the Remove column that corresponds to the template that you want to delete.
2. Click **Update** to delete the template or click **Restore** to reset the original values in the window.

   A confirmation window opens.
3. Click **Confirm Update** to delete the template or click **Cancel** to return to the Available Templates window.

32.17 Enabling and Disabling Template Definitions

Perform the following steps to enable or disable a template.

Prerequisites
None

Responsibility
CRM HTML Administration or CRM User Management

Role
JTA_UM_SETUP_ADMIN

Navigation
In the System Administrator Console, navigate to Users>Setup>Templates

Steps
4. If you want to enable a template, select **Enabled** from the drop-down list in the corresponding Status column.
5. If you want to disable a template, select **Disabled** from the drop-down list in the corresponding Status column.
6. Click **Update** to modify the template's status or click **Restore** to reset the original values in the window.

   A confirmation window opens.
7. Click **Confirm Update** to modify the template's status or click **Cancel** to return to the Available Templates window.

32.18 Editing a Template's Details
Perform the following steps to edit a template's details.

Prerequisites
None

Responsibility
CRM HTML Administration or CRM User Management

Role
JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Templates.

Steps

1. Click the name of the template in the Template Name column.

   The User Management: Update Template window opens.

2. Edit the fields as desired.
3. (Optional) Click **Clear** to reset the fields to their original settings.
4. Click **Update** to save your changes.

32.19 Searching for a Template

A template is an application-specific set of JSPs that you can use to customize the user registration process. Perform the following steps to search for a template.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Templates

Steps

1. Select how you want to search for the template. Options include Template Name or Template Key from the drop-down list.
2. Enter your search criteria into the text field and click **Go**.

32.20 Setting Up Enrollments

Enrollments are a set of add-on services that can incrementally capture user data and grant users additional access privileges. Users can obtain enrollments during registration or after the approval process is completed. Enrollments typically grant a user access to an application, but can also enable the user to accept licensing terms, to provide surveys, and to sign up for parking permits or any other service. Enrollments can be tied to one or many user types, can be automatic, self-service, delegation only, or delegation and self-service, and may require an approval process. They correspond to a 0-1 responsibility and 0-many security roles and are optionally displayed in a user interface such as a JSP page. For instructions on setting up enrollments, see the following:

- Creating an Enrollment
- Removing an Enrollment
- Enabling and Disabling Enrollment Definitions
- Editing an Enrollment's Details

32.21 Creating an Enrollment

Perform the following steps to create an enrollment.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Enrollments and click the **Create New Enrollment** button.

Steps

1. Define the following information:

a. Enter an Enrollment Key.

b. Enter a name for the new enrollment.

c. (Optional) Enter a description for the new enrollment. This description can include HTML tags for style. There is a 2000 character limit in the field that includes all HTML tags.

2. Select roles and responsibilities.

   a. Select a responsibility from the Responsibility drop-down list. If no responsibility is required, choose **No Responsibility is Required**.

   b. Select the name of a role in the Available list and click **>** to move it to the Assigned list. You can hold down the [CTRL] key and use your mouse to select multiple roles.

   c. Repeat the previous step to add more roles to the list.

   d. To move all Available Roles to the Assigned Roles list, then click **>>** or to move all Assigned Roles to the Available Roles list, then click **<<**.

   e. Select an application from the drop-down list.

   f. Select an approval from the drop-down list. If no approvals are required for the user to subscribe to the service, choose **No Approval Required**.

   g. Select an enrollment template from the drop-down list.

3. (Optional) Click **Reset** to clear the fields and click **Create** to save your changes.

32.22 Removing an Enrollment

Perform the following steps to delete an enrollment.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Enrollments.

Steps

1. Select the check box in the Remove column that corresponds to the enrollment that you plan to delete.
2. Click **Update** to remove the enrollment or click **Restore** to reset the original values in the window.

   A confirmation window opens.
3. If you are sure you want to delete the enrollment, click **Confirm and Update Now**.

32.23 Enabling and Disabling Enrollment Definitions

An enrollment is an optional step in the user registration process. Perform the following steps to enable or disable an enrollment.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Enrollments.

Steps

1. If you want to enable an enrollment, select **Enabled** from the drop-down list in the corresponding Status column.
2. If you want to disable an enrollment, select **Disabled** from the drop-down list in the corresponding Status column.
3. Click **Update** to modify the information or click **Restore** to reset the original values in the window.

A confirmation window opens.

4. Click **Confirmed and Update Now**.

   The enrollment status is modified.

32.24 Editing an Enrollment's Details

An enrollment is an optional step in the user registration process. Perform the following steps to edit an enrollment's details.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

In the System Administrator Console, navigate to Users>Setup>Enrollments.

Steps

1. Click the name of the enrollment.

   The Update Enrollment window opens.

2. Edit the fields as desired and click **Next**.
3. Select the **Assign the changed role to existing users of this Enrollment** check box if you want previously registered users to be granted the specified role.
4. Assign new roles as needed.
5. Select the **Assign the changed responsibility to existing users of this Enrollment** check box if you want previously registered users to be granted the specified responsibility.
6. (Optional) Click **Reset** to reset the fields to their original settings or click **Update** to save your changes.

   A confirmation window opens.

32.25 Setting Up User Types

User types are categories of users based on an organization’s unique registration requirements. They provide a flexible, and extensible method of defining, categorizing, and implementing specific forms of user behavior. In addition, user types facilitate user self-service registration by enabling merchants to associate default roles, responsibilities, accounts, and registration templates with categories of users and to determine the appropriate approval process. All users that belong to a specific user type possess the same registration requirements and, if desired, are provided the same default application access with one responsibility and a range of security roles from none to several complex ones. They can sign up for and configure a set of enrollments and are required to participate in the same approval process. Oracle User Management contains three default user types: primary user, business user, and individual user. Information about each user that registers for one of these types is stored in the TCA, FND, and JTF schemas. For instructions on setting up user types, see the following:

- Creating a User Type
- Removing a User Type
- Activating and Deactivating User Types
- Searching for a User Type
- Editing a User Type’s Details

32.26 Creating a User Type

A user type is a category of users based on common responsibilities and roles. User Management ships the following predefined user types out-of-the-box:

- primary user
- business user
- individual user

Each user type is assigned predefined enrollments that include different roles, responsibilities and availability. Legacy users that uptake the new user management framework, no longer have access to the default roles and responsibilities windows. The user type definition replaces these windows. Roles and responsibilities defined at the user level are the default.

Creating a new user type is a multi-step process. The following table lists the three pages needed to create a user type.

Table 32–2 Necessary User Type Information

Page	Information	Description
Details	■ Description ■ Enable Self-Service Registration ■ Registration Template ■ Application ■ Approval by	■ Optional description of user type ■ Checkbox ■ ■ ■ You also can change the User Type name here.
Credentials	■ Default Responsibility ■ Default Roles ■ Role delegation	■ ■ ■ Checkbox
Enrollments	■ Enrollment name ■ Activate (Yes or No) ■ Availability ■ Order the active enrollments	■ ■ ■ ■

Perform the following steps to create a new user type.

Note: If you deselect the Enable Self-service Registration check box when you create a new user type, the user type does not appear in the self-service registration window when you click the "Register Here" link unless the user has the JTF_SECURITY_ASSIGN_ROLE permission.

At runtime, the system validates that the user has this permission, if not, it confirms if the check box is selected and only shows the user types that are available for self-service.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

Log in to the CRM System Administrator Console as a system administrator, navigate to Users>Setup>User Types, and click the **Create New User Type** button.

Steps

1. Enter the details for the user type:
    a. Enter a user type name.
    b. Enter a user type key.
    c. (Optional) Enter a description into the Description field. This description can include HTML tags for style. There is a 2000 character limit in the field that includes all HTML tags.
    d. (Optional) Select **Enable Self-service Registration** to display the new user type during the registration process from the "Register Here" link.
    e. Enter the order in which you want the user type to be displayed.
    f. Select the default registration template and default application from the drop-down lists.
    g. Select the approval by information from the drop-down list and click **Next**.
2. Enter the credentials for the user type:
    a. Select a default responsibility from the drop-down menu. This determines the default login page for the user.
    b. Assign a default role to the user. This determines the default level of functional ability for the user.
3. Enter the enrollments for the user and click **Next**:
    a. Choose Yes or No from the Activate drop-down list next to the enrollment name.
    b. Determine the enrollment's availability by choosing either Automatic, Delegation & Self Service, Delegation Only, or Self Service from the drop-down menu. These values are explained in the Enrollments section of this document.

c. Enter the order in which you with the enrollment to appear in the Order field.

32.27 Removing a User Type

A user type is a category of users based on common responsibilities and roles. A user type can be removed as long as it is not enabled (in use). Perform the following steps to remove a user type.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

Log in to the CRM System Administrator Console as a system administrator, navigate to Users>Setup>User Types.

Steps

1. Select the check box in the Remove column that corresponds to the user type that you want to delete.
2. Click **Update** to delete the User Type or click **Restore** to reset the original values in the window.

   A confirmation window opens.
3. Click **Confirm** to delete the User Type or click **Cancel** to cancel the deletion.

32.28 Activating and Deactivating User Types

A user type is a category of users based on common responsibilities and roles. Perform the following steps to activate or deactivate a user type.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation

Log in to the CRM System Administrator Console as a system administrator, navigate to Users>Setup>User Types.

Steps

1. If you want to activate an enrollment, select **Active** from the drop-down list in the corresponding Status column.
2. If you want to deactivate an enrollment, select **Inactive** from the drop-down list in the corresponding Status column.
3. Click **Update** to modify the status of the user type or click **Restore** to reset the original values in the window.

32.29 Searching for a User Type

A user type is a category of users based on common responsibilities and roles. Perform the following steps to search for a user type.

Prerequisites

None

Responsibility

CRM HTML Administration or CRM User Management

Role

JTA_UM_SETUP_ADMIN

Navigation
Log in to the CRM System Administrator Console as a system administrator, navigate to Users>Setup>User Types.

Steps
1. If you want to search by the User Type Name, then:
   a. Enter your search phrase into the text input field.
   b. Click **Go**.

      The results appear in the window.
2. If you want to search by the User Type Key, then:
   a. Enter your search phrase into the text input field.
   b. Click **Go**.

      The results appear in the window.

32.30 Editing a User Type's Details
A user type is a category of users based on common responsibilities and roles. Perform the following steps to edit a user type's details.

Prerequisites
None

Responsibility
CRM HTML Administration or CRM User Management

Role
JTA_UM_SETUP_ADMIN

Navigation
Log in to the CRM System Administrator Console as a system administrator, navigate to Users>Setup>User Types.

Steps
1. Click the name of the user type in the User Type Name column.

The User Type Details window opens.

2. Edit the fields as desired.
3. (Optional) Click **Clear** to reset the fields to their original settings.
4. Click **Next** to save and go on to the next page.

   The Roles and Responsibilities window opens.
5. Edit the information as needed.
   a. Use the drop-down list to select a user type responsibility.
   b. (Optional) Select the **Assign the changed responsibility to existing users of this user type** check box if you want users registered under this user type to be granted the responsibility specified.
   c. To assign roles, select the name of a role in one list and then click **>** or **<** to move it to the other list. Repeat this step for as many roles you want to assign.
   d. If you want to move all Available Roles to the Assigned Roles list, then click **>>**.
   e. If you want to move all Assigned Roles to the Available Roles list, then click **<<**.
   f. (Optional) Select the **Assign the changed role to existing users of this user type** check box if you want users registered under this user type to be granted the role specified.
6. Click **Next** to save and go on to the next page or click **Restore** to revert back to the original values in the window.

   The Enrollments window opens.
7. Edit the information as needed.
   a. If you want to enroll the user type in an enrollment, select **Yes** from the drop-down list in the Enroll column.
   b. If you do not want to enroll the user type in an enrollment, select **No** from the drop-down list in the Enroll column.
   c. Select **Automatic** or **Self-service** from the drop-down lists to define the type.
   d. Enter a number into the fields in the Order column to set enrollment order.

   e. If you want to edit an enrollment's details, then click the name of the enrollment.

8. Click **Next** to save and go on to the next form or click **Restore** to revert back to the original values in the window.

   The User Types window opens with the newly updated user type information.

32.31 Creating Primary User Approval Groups

User Management provides support for assigning requests to the group of primary users within an external organization. Merchants can set up an approval hierarchy for this group and then define a single "virtual" or "logical" approver within the approval hierarchy called the Universal Approver. Requests that are assigned to the Universal Approver can be seen and processed by any/all primary users of the external organization to which the request belongs and are removed from the queue when the first approver approves or rejects them. Security is maintained since primary users can only see requests that pertain to users of their organization. Universal Approvers receive email notifications each time a new approval is required. Consequently they do not have to log into the system and query new approval requests to determine whether or not any new approvals are required.

Prerequisites

You must be the merchant administrator, system administrator to create a universal approver.

Responsibility

System Administrator or CRM HTML Administration

Navigation

Log in to the CRM System Administrator Console as a system administrator, navigate to Users>Registration>User Maintenance>Create.

Steps

1. Choose the individual user registration profile and click **Next**.
2. Enter personal information for the user.
3. Assign the JTF_APPROVER permission to the user:
   a. Click the Settings tab and then navigate to Security>Access Controls>Permissions.

   b. Search for and access the JTF_APPROVER permission.
   c. Make a note of the role to which JTF_APPROVER permission is assigned. If this permission is not assigned to a role, navigate to Security>Access Controls>Roles and assign the permission to a new or existing role.
   d. Click the Users Tab and navigate to Registration>User Maintenance.
   e. Search for and access the user you created in steps 1 and 2.
   f. Click **Roles** and assign this user the role containing the JTF_APPROVER permission.
4. Navigate to Setup>Approval Setup and either select an approval from the list or create a new approval.
5. Add the newly created user to the Approver list, enter the desired number in the Order field, and then click **Submit**.
6. In the Forms-based interface, navigate to Profile>Sytem, enter "JTF PRIMARY USER" in the Profile field and click **Find**.
7. In the Site column, select the newly created user from the list of values and click **OK**. Save your work and exit the Forms-based interface.

> **Note:** You can test these steps by registering a new user for your organization and checking the workflow notifications in your personal home page. The work list on this page will contain workflow notifications for every user new user you subsequently register.

32.32 Backward Compatibility

User and account requests that are filed through iStore or before the latest version of User management was applied must be approved using the old "Pending Requests" screen. Perform the following steps to approve or reject these user requests.

> **Note:** The "End User" user type in the old registration module has been renamed to “Individual User"

Prerequisites

None

Responsibility

CRM HTML Administrator

Role

JTF_APPROVER

Navigation

In the System Administrator Console, navigate to Users>Registration>Pending Approvals

Steps

1. Review the following text at the bottom of the screen:

   "Requests filed through the old registration module will have to be approved from the old request page. This link will be removed, once all these requests have been processed. Click here"

2. Click the **Click Here** link and approve or reject the users as you see necessary. Any user account requests filed after this patch has been applied will be visible in the main Pending Approval screen.

32.33 Related Documentation and Resources

You can consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Oracle Workflow Administrator's Guide*
- *Oracle Receivables User Guide*

These documents range from the general to the specific, in the order listed in the following table.

Table 32–3 Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	This document contains information about new product features and functions for the various Oracle applications.
Installing Oracle Applications, Release 11*i*	This documents the Rapid Install installation process.
Implementing CRM Applications, A85301-01	This document contains post-installation information on CRM modules.
Oracle CRM Foundation Components, Concepts and Procedures	This document contains a printed compilation of the Oracle Foundation online help system.
Oracle CRM Foundation, Technical Reference Manual	This document contains table and view descriptions for all the Foundation components.

Part XI

Post Implementation Tasks

This part of the Oracle Common Application Components Implementation Guide contains the following chapter:

33

Verify the Implementation

33.1 Oracle Common Application Components Implementation Verification Tasks

This section covers the following topics:

- Running Diagnostic Tests
- Verification Task List per Module

33.1.1 Running Diagnostic Tests

Before proceeding with the implementation of the Common Application Components, run the applicable diagnostic tests available through the HTML System Administrator Console. You can troubleshoot any setup and installation problems of the technology foundation and certain participating applications such as Foundation. Note that a product module must be registered with the diagnostic tool before diagnostic tests for it become available.

Additionally, you can register and employ new diagnostic tests, run test groups and individual tests, and manage tests and test groups. An implementor would most likely either verify using the Basic tab or the Advanced tab. The type of tests that are available depend on which application you test.

Each test generates a report if a problem is encountered. The report identifies the problem and provides a suggested resolution to the problem.

33.1.1.1 Accessing the HTML Diagnostic Test Set

The HMTL Diagnostic Test Set can be accessed in one of two ways:

- Selecting the Diagnostics tab in the System Administrator Console

- Using a variation of the following URL:

  tap://<hostname>:<portnumber>/OA_HTML/jtfqalgn.htm

33.1.1.2 Selecting the Diagnostic Level that is Appropriate

The Diagnostic Tool contains three functional areas:

- **Basic**: Use the links on this tab to automatically run all the listed diagnostic tests or to run specific tests. Define test input parameter values using the Configuration tab.
- **Advanced**: Use the links on this tab to test specific CRM modules or groups. Enter input parameter values for the specific test directly in this window.
- **Configuration**: Use this window for test and group administration and to configure any necessary test input parameters.

Note: Consult the Diagnostic Tool user interface for a description of each test.

33.1.1.3 Viewing the Diagnostic Reports

After a test is run, a summary appears on the Results window. To access the report, double-click the report icon.

Log-in Issues

A commonly reported problem is the inability of a user to log in to the console. Frequently, this has nothing to do with the setup of the HTML Tech Stack or the System Administrator Console. The problem is that user data, especially numeric data, is entered incorrectly during user definition. This can effectively make it impossible to log in to the Console and correct the problem. The independent URL for the Diagnostic Tool then becomes the portal for pinpointing and correcting the error.

Note: Refer to the Understanding Diagnostics section in the *Oracle Applications CRM System Administrator's Guide* for additional information.

33.1.2 Verification Task List per Module

After you complete the configuration and setup of all the Oracle Common Application Components modules, verify that you can perform the tasks outlined in the following table to ensure that you have setup the module correctly.

Table 33–1 Common Application Components Verification List

Foundation Module	Task	Reference
HTML Tech Stack	Login to HTML Applications as System Administrator	*Oracle Applications CRM System Administrator's Guide.*
User Management	Register and approve a new user	*Oracle Common Application Components User's Guide*
Resource Manager	▪ Import a resource (Forms) ▪ Create a salesperson (Forms or HTML) ▪ Create a group resource (Forms or HTML)	*Oracle Common Application Components Implementation Guide*
Notes	Create a note for a task	*Oracle Common Application Components User's Guide*
Assignment Manager	▪ Assign a resource to a task	*Oracle Common Application Components User's Guide*
Task Manager	Create a task	*Oracle Common Application Components User's Guide*
Calendar (Forms)	Assign a resource to a shift	*Oracle Common Application Components Implementation Guide*
Calendar (HTML)	▪ Create an appointment ▪ Invite attendees	*Oracle Common Application Components User's Guide*
Escalations	Escalate a task	*Oracle Common Application Components User's Guide*
Business Rule Monitor	Ensure that a rule is violated and appropriately escalated	*Oracle Common Application Components Implementation Guide*

You must be able to complete each task successfully, or your Oracle Common Application Components modules will not work properly. If you are unable to complete a task successfully, then correct the problem before continuing.

Part XII

Appendices

This section of the Oracle Common Application Components Implementation Guide contains the following chapters:

- Appendix A: Profile Options
- Appendix B: Concurrent Programs

A

Profile Options

This appendix chapter describes profile option settings that are required for successful implementation. These profile options are only for Common Application Components. For additional functionality, you may need to set additional profile options from the appropriate calling applications. Consult the calling application's documentation for additional information. Topics in this section include:

- Before You Begin
- About Profile Options
- Setting Profile Options
- Common Application Components Profile Options
  - Resource Manager
  - Notes
  - Spreadtable
  - Gantt
  - Assignment Manager
  - Task Manager
  - Calendar
  - Escalation Manager
  - Business Rule Monitor
  - User Management

A.1 Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to

```
$COMMON_TOP/admin/scripts
```

and executing

```
adcmctl.sh <APPS username/APPS password> start.
```

A.2 About Profile Options

You set profile options whenever you want the application to react in different ways for different users, depending on specific user attributes. Profile options affect the way the applications run. Oracle Application Object Library establishes a value for each option in a user's profile when the user logs on or changes responsibility. Oracle Application Object Library provides many options that you can set to alter the user interface of the applications to satisfy individual preferences.

Profile options are defined and can be set at four levels:

- Site
- Application
- Responsibility
- User

You define a profile option to determine which subset of the organization's data your end user views. From the point of view of a System Administrator or end user, profile options that are defined are indistinguishable from those provided by Oracle Application Object Library.

Site Level

Site is the lowest user profile level. Site-level option values affect the way all applications run at a given installation.

Application Level

Application is the user profile level immediately above Site. Application-level option values affect the way a particular application runs.

Responsibility Level

Responsibility is the user profile level immediately above Application. Responsibility-level option values affect the way applications run for all users of a responsibility.

User Level

User is the highest user profile level and is immediately above Responsibility. User-level option values affect the way applications run for an application user.

Example

Oracle Application Object Library provides a site-level Printer option, an application-level Printer option, and so on. Oracle Application Object Library enforces the level hierarchy to ensure that higher-level option values override lower-level values. As a result, if your Site-level Printer value is "New York", but your User-level Printer value is "Boston" your reports print on the Boston printer.

A.2.1 Setting Profile Option Values

A System Administrator can set values for profile options at each profile level. You can set default values for your new profile options by using the System Administrator responsibility. Typically, a System Administrator sets site-level option values after installing Oracle Application Object Library-based applications at a site. These site-level option values then work as the defaults until the System Administrator or end user sets them at higher levels. Oracle Application Object Library derives run-time values for each user's profile options based on values the System Administrator sets at each level. An option's run-time value is the highest-level setting for that option.

Example

For a given end user, the Printer option is set only at the Site and Responsibility levels. When the end user logs on, the Printer option sets the value at the Responsibility level, since it is the highest-level setting for the option. If the default value of a user profile option at any level is inappropriate, the System Administrator can change it at any time. This change takes effect as soon as end users log on again or change responsibilities.

See Also

The appendix in the Oracle Applications System Administrator's Guide.

A.2.2 Setting Profile Options

A user profile is a set of changeable options that affect the way your application looks and behaves. As System Administrator, you control how Oracle Applications operate by setting user profile options to the values you want. You can set user profile options at four different levels: site, application, responsibility, and user. Perform the following steps to set profile options.

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Profile > System**.

Steps

1. In the Find System Profile Values window, select an appropriate check box for the profile option that you want to set before clicking **Find**.

   The System Profile Values window opens with the profile option you searched for.

2. Set an appropriate value for your profile option if the checkbox is selected:

   a. Set the Site value.

      This field displays the current value, if set, for all users at the installation site.

   b. Set the Application value.

      This field displays the current value, if set, for all users working under responsibilities owned by the application identified in the Find Profile Values block.

   c. Set the Responsibility value.

      This field displays the current value, if set, for all users working under the responsibility identified in the Find Profile Values block.

   d. Set the User value.

This field displays the current value, if set, for the application user identified in the Find Profile Values block.

You should set site-level default values for any required options after installation of an application. If you do not assign a particular profile option at any of the four levels, that option does not have a default value and may cause errors when you use forms, run reports, or run concurrent requests.

3. Save your work.

Note: For Business Rule Monitor profile options, enter the name of the workflow administrator in the Site field. This user is the one that you previously named in Defining the Owner of the Workflow Process.

A.3 Common Application Components Profile Options

This section summarizes the Oracle Common Application Components profile options per module that you need to set.

- Resource Manager
- Notes
- Spreadtable
- Gantt
- Assignment Manager
- Task Manager
- Calendar
- Escalation Manager
- Business Rule Monitor
- User Management

A.3.1 Resource Manager Profile Options

The following table describes the profile options that are specific to the Resource Manager. Each profile option is specific for HTML-based functionality.

Table A–1 Resource Manager Profile Options

Name	Default Value	Level	Description	Outcome
Employee Resource Update Access	Self	Site	This profile option sets the security around updating employee information in the Resource Manager.	If set to **Self**, only the employee can update their own information. If set to **Any**, others, including a System Administrator, can update the employee information, including overriding any previous values in the profile option: Resource Lookup Audience.
Group Update Access	None	Site	This profile option sets the security around updating groups, including hierarchies.	If set to **None**, then only the Administrator or manager can update their group and any other group following their group in the hierarchy. If set to **All**, then the user can update any group hierarchy in the site.
Resource Lookup Audience	General	Site	This profile option controls what the user views in the Resource Details window and in the Advanced Search.	If set to **Admin**, then the user can query in the Advanced Search using the additional fields of Resource number and Salesperson number. If set to **General**, then the user is sees and searches on limited fields.
Role Update Access	None	Site	This profile is used to control the access to the Role HTML windows. The Resource Self Service Administrator responsibility level is set to the **All** value.	If set to **None**, then it is Read-Only access to the Role windows. You can search and view all the roles. If set to **All**, then the user can create, update non-seeded roles, delete non-seeded roles, search, and view roles.

Table A–1 Resource Manager Profile Options

Name	Default Value	Level	Description	Outcome
Resource active days after termination of source	30 days	Site	This profile is used when end dating a resource of type Partner or employee. It allows a set period of days for the resource to stay active after termination. Set at Site level.	When set to **x days** the resource has that many days to stay active in the system.

A.3.2 Notes Profile Options

The following table describes the profile options that are specific to Notes.

Table A–2 Notes Profile Options

Name	Default Value	Level	Description	Outcome
Notes: Default Note Status	Public	Site	This profile option sets the default note status. Profile option values include private, public, or publish.	If you select **Publish**, then that is the default value shown in the Status drop-down list when creating a new note. If no profile option is set, default is **Public**.

A.3.3 Spreadtable Profile Options

Note: The browser must be restarted for changes to the profile option settings to take effect.

The following table describes the profile options that are specific to Spreadtable.

Table A–3 Spreadtable Profile Options

Name	Default Value	Level	Description	Outcome
JTA Display images in the grid	Null	User	This profile options sets whether or not images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), the value is treated as **Yes**. If set to **Yes**, all images are visible. This is a global setting for all spreadtable images. If set to **No** all images are turned off.
JTA Display images in grid column headers	Null	User	This profile options sets whether or not column header images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all column header images are visible. If set to **No** all column header images are turned off.
JTA Display header popup images	Null	User	This profile options sets whether or not header popup images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all header popup images are visible. If set to **No**, all header popup images are turned off.
JTA Display row header images in the grid	Null	User	This profile options sets whether or not row header images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all row header images are visible. If set to **No**, all row header images are turned off.
JTA Display grid popup images	Null	User	This profile options sets whether or not grid popup images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all header popup images are visible. If set to **No**, all header popup images are turned off.

Table A–3 Spreadtable Profile Options

Name	Default Value	Level	Description	Outcome
JTA Display checkbox images	Null	User	This profile options sets whether or not images in cells defined as check boxes are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all check box images are visible. If set to **No**, an asterick (*) is used for True and Null (blank) for False
JTA Display custom images	Null	User	This profile options sets whether or not images in cells defined as 'Image' are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all cell images are visible. If set to **No**, the image description is used in place of the image.
JTA Display long wait images	Null	User	This profile options sets whether or not long wait images are visible in the spreadtable. Possible values are Null, Yes, or No.	If **Null** (left blank), it has the same value as JTF_GRID_DISPLAY_IMAGES. If set to **Yes**, all long wait images are visible. If set to **No**, no long wait images are visible.

A.3.4 Gantt Profile Options

The following table describes the profile options that are specific to Gantt

Table A–4 Gantt Profile Options

Name	Default Value	Level	Description	Outcome
JTF_GANTT_ SNAP_VALUE_ DAYS_MODE	60 minutes	User	Enables the start or end of a taskbar to automatically readjust (snap) during drag and drop operations in the "Day" view.	Snaps to the default value if the user does not specify a snap value.

Table A–4 Gantt Profile Options

Name	Default Value	Level	Description	Outcome
JTF_GANTT_ SNAP_VALUE_ SIX_HOURS_ MODE	60 minutes	User	Enables the start or end of a taskbar to automatically readjust (snap) during drag and drop operations in the "6 Hour" view.	Snaps to the default value if the user does not specify a snap value.
JTF_GANTT_ SNAP_VALUE_ THREE_HOURS_ MODE	30 minutes	User	Enables the start or end of a taskbar to automatically readjust (snap) during drag and drop operations in the "3 Hour" view.	Snaps to the default value if the user does not specify a snap value.
JTF_GANTT_ SNAP_VALUE_ HOURS_MODE	15 minutes	User	Enables the start or end of a taskbar to automatically readjust (snap) during drag and drop operations in the "Hour" view.	Snaps to the default value if the user does not specify a snap value.
JTF_GANTT_ SNAP_VALUE_ 30MIN_MODE	10 minutes	User	Enables the start or end of a taskbar to automatically readjust (snap) during drag and drop operations in the "30 Minute" view.	Snaps to the default value if the user does not specify a snap value.
JTF_GANTT_ SNAP_VALUE_ 15MIN_MODE	5 minutes	User	Enables the start or end of a taskbar to automatically readjust (snap) during drag and drop operations in the "15 Minute" view.	Snaps to the default value if the user does not specify a snap value.
JTF_GANTT_DEF_ TIMELINE_MODE	Day Mode	Site Application Responsibility User	Enables specification of one of the following modes upon startup: ▪ 15 Minutes Mode ▪ 30MIN ▪ Hours Mode ▪ 3 Hours Mode ▪ 6 Hours Mode ▪ Days Mode	Specifies one of six available modes on startup.

A.3.5 Assignment Manager Profile Options

The following table describes the profile options that are specific to Assignment Manager.

Table A–5 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
Activate Auto Selection of Resources	Yes	Application	This profile option is set to activate the auto-selection of resources by the Assignment Manager engine. The engine uses this profile option setting to determine where the user needs to make a selection from the provided list of resources, or if this task is performed automatically by the Assignment Manager engine itself.	If you set this profile option to **No**, the Assignment Manager engine will automatically make a selection from the provided list of resources.
Activate Contracts Preferred Resources	No	Application	This profile option is set to retrieve the preferred resource information from the Contracts module. The engine uses this profile option setting to determine whether the Contracts Preferred Engineers are picked up automatically by the Assignment Manager engine or not.	If you set this profile option to **No**, it will uncheck the Contracts in the Assignment Manager.
Activate Installed Based Preferred Resources	No	Application	This profile option is set to retrieve the preferred resource information from the Installed Base module. The engine uses the profile option setting to determine whether the Installed Base Preferred Engineers are picked automatically by the engine.	If you set this profile option to **No**, it will uncheck Territories in the Assignment Manager.
Activate Workflow Name	No default value	Application	This profile option is set to a user-defined workflow procedure name. This workflow procedure is user-programmed code for further filtering the resources. The engine retrieves the procedure name from this profile option, and uses it to process the user's request.	This profile option is an additional filter based on the user's criteria.
JTFAM: Resource Type for Unassisted Mode	Employee Resource	Site	This profile option sets the default value for resource type in the unassisted mode.	This profile option is a convenience to the user who wants the resource type to be the defaulted value in the unassisted mode.

Table A–5 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
JTFAM: Resource Search Order	Contracts Preferred Resource	Site	This profile option sets the default order for resource selection between Contracts and Installed Base if both check boxes are selected in the Assignment Manager for a service request assignment.	If Contracts Preferred Resource is selected, then Assignment Manager engine checks Contracts preferred resources first. If a Contracts preferred resource is found, then stop the process. If not, then check the Installed Base preferred resources. If a Installed Base preferred resource is found, and stop the process. If not, then continue check the territories. If Installed Base Preferred Resource is selected, then Installed Base preferred resources are checked first, if a resource is found, then stop the process. If not, then continue check the Contracts. If "Both Contracts and Installed Base" is selected, then Assignment Manager checks both preferred resources simultaneously before retrieving qualified resources from winning territories.

Table A–5 Assignment Manager Profile Options

Name	Default Value	Level	Description	Outcome
JTFAM: Usage for Groups and Teams	All	Site	This profile option sets the default value for the group and team resource selection used in a service request assignment.	If it is set to **All**, then all group or team resources, regardless of its usage, are all displayed in the Gantt chart. If it is set to **Support**, then only the group or team with Support usage can then be retrieved for a service request assignment.

A.3.6 Task Manager Profile Options

The following table describes the profile options that are specific to Task Manager.

Table A–6 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Default Task Type	No default value	Site	Use the Default Task Type profile option to set the default task type. Possible values include appointment and lead.	Set the value to the task type that you want to appear in the task type drop-down list when you are creating a task.
Task Manager: Default Task Status	Open	Site	Use the Default Task Status profile option to set the default task status. Possible values include open and completed.	Set the value to the task status that you want to appear in the task status drop-down list when you are creating a task.
Task Manager: Default Task Priority	Medium	Site	Use the Default Task Priority profile option to set the default task priority. Possible values include critical and medium.	Set the value to the task priority that you want to appear in the task priority drop-down list when you are creating a task.
Task Manager: Default Task Owner	No default value	Site	Use the Default Task Owner profile option to set the default task owner.	Set the value to the name of the default task owner.

Table A–6 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Owner Type for Task	No default value	Site	Use the Owner Type for Task profile option to set the default owner type. Possible values include employee resource and party.	Set the value to the owner type for the task.
Task Manager: Default Assignee Status	Accepted	Site	Use the Default Assignee Status profile option to set the default assignee status.	Set the value to the assignee status that you want to appear in the Assign To Status drop-down list when you are creating a task.
Task Manager: JTF Tasks Default Date Selected	Scheduled	Site	Use the JTF Tasks Default Date Selected profile option to set the default date selected. Possible values include Planned, Scheduled, or Actual.	Set the value to the default date that you want to default in the Create Task window.
Task Manager: Task APIs to Determine if Security is Implemented	No default value	Site	The Task APIs to Determine if Security is Implemented profile option is reserved for future use.	The value of this profile option should always be set to No.
Time Unit of Measure Class	Time	Site	Use the Time Unit of Measure Class profile option to define the time unit of measure class in the inventory module. Depending on the time unit of measure class, you will see the list of UOM codes in the Tasks module.	Depending upon the value of this profile, the Time UOM codes are shown in the list of values. If the value of this profile changes, then there will be a discrepancy between the existing data and the new LOV shown for the new Time UOM class. Oracle strongly recommends the value of this profile should NOT be changed after the system in the production
Task Manager: View All Task Privileges	Yes	Site	The View All Task Privileges profile option is reserved for future use.	Do not change the value of this profile option.
Task Manager: View All Task Privileges	Yes	Site	The View All Task Privileges profile option is reserved for future use.	Do not change the value of this profile option.

Table A–6 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Delete Any Task Privileges	No	Site	The Delete Any Task Privileges profile option is reserved for future use.	Do not change the value of this profile option.
Task Manager: Use the Indicator of Data Truncation	...	Site	Use the Indicator of Data Truncation profile option to store a three-character code which is appended to the source object name of a Task when it has been truncated. The default value of this profile option is '...'. For example, if the source of a Task is a Party, the name may be too large to store in the source_object_name column. If the name: "This is a very long name to test the truncation indicator functionality" (71 chars) is passed to the Task API as the source object name, it is written to the Task record as: "This is a very long name to test the truncation indicator..." (60 chars). The default value of this profile option is '...'.	Set the value that is appended to the source object name of a Task when it has been truncated.
Task Manager: Create Quick Task	No default value	Site	Use the Create Quick Task profile option to display the quick create button on the Tasks Summary window.	Set the value to **Yes** if you want the Quick Create button to appear in the Task Summary. Set the Value to **No** if you do not want the button to appear in the window.
Client Timezone	America/ Los_ Angeles	Site	The Client Time zone profile option is used by Calendar to set the default time zone for the client in the Create Appointment window.	Set the value to the location where your appointments take place. Setting the time zone from the profile link in the Calendar UI is another way to set and update this profile value.

Table A–6 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Send Notifications to Group or Team Members	No	Site	The Task Manager: Send Notifications to Group and Team Members profile option provides the ability to notify either the Owner or the Assignee of a Group or Team resource, when a task is modified. This profile option is for workflow only.	If the value is set to **No**, then no notification will be sent to group or team members. If the profile option is set to **Yes**, then the system looks at any resources of type Group or Team and expand them to include any of their members whose resource type is RS_EMPLOYEE, RS_PARTY or PARTY_PERSON. When adding a resource to the notify list, the system checks to see if the resource is already on the list before adding it.
Task Manager: Enable Automated Task Workflow Functionality	No	Site	The Task Manager: Enable Automated Task Workflow Functionality profile option is used to determine whether to send the automatic notifications or not.	Set the value to **No**, for the task workflows not to be initiated by the API. If the value is set to **Yes**, then task workflows are initiated by the API. The default value is No.
Task Manager: Abort Previous Task Workflow if it is still active	No	Site	The Task Manager: Abort Previous Task Workflow if it is still active profile option is used to determine whether to abort the previous workflow processes before starting the next one.	If the value is set to **No**, then the previous Task Workflows that are still active are not aborted. If the value is set to **Yes**, then the previous Task Workflows that are still active are aborted.
JTF_TASK_SUMMARY_SOURCE	Source	User	The JTF_TASK_SUMMARY_SOURCE profile option sets the view drop-down list value in the Task Summary context sensitive window. Possible values are Source and All.	Set the value to **Source** to have all tasks created with a particular source in the contextual window. Set the value to **All** to have all tasks created with a source as well as those which refer to that source in the context sensitive Task Summary.

Table A–6 Task Manager Profile Options

Name	Default Value	Level	Description	Outcome
Task Manager: Mass Task Reassign Access	No	Site	Use the Task Manager: Mass Task Reassign Access profile option to display the Task Reassignment window.	If the profile option is set to **Yes**, the Task Reassignment window is accessible and the administrator is able to reassign tasks. If the value is set to **No**, then the Task Reassignment window is not accessible and a relevant message is shown.
JTF Sync: Category Value	Oracle Business	System	This profile option is used in the Palm and Outlook synchronization process. It is to set the default value for the category while trying to download business contacts to the offline device.	All business contacts downloaded to the offline device will be created with this category. If the category does not exist in the offline device, then it will be created upon synchronization.
Task Manager: Copy Task Start Date to End Date	Yes	Site	This profile option is used to control the task start and end date for the Palm and Outlook synchronization.	If it is set to **Yes**, the task start date is defaulted from the system date and the task end date is defaulted to the task start date. For example, if it is set to Yes, then any changes the user made to the task start date while the user is in the task creation screen will automatically be populated to the task end date field.
Task Manager: Set Context Data Security	Full Access	Site	Use the Task Manager: Set Context Data Security profile option to set task data security for the context sensitive task instances.	If Full Access is selected, then all the tasks related to the context can be viewed, updated, and deleted. If Security Access is selected, then whether the task for that context can be updateable is based on the privileges granted to the user.

A.3.7 Calendar Profile Options

The following table describes the profile options that are specific to the HTML Calendar.

Table A–7 Calendar Profile Options

Name	Default Value	Level	Description	Outcome
JTF HTML Calendar Administrator	No default value	User	The JTF HTML Calendar Administrator profile option sets the Calendar System Administrator who grants approval and subscription requests for group and public calendars.	Set the value to the username of the calendar user who grants group and public calendar requests.
Client Timezone	America/Los_Angeles	Site	The Client Time zone profile option is used by Calendar to set the default time zone for the client in the Create Appointment window.	Set the value to the location where your appointments take place. Setting the time zone from the profile link in the Calendar UI is another way to set and update this profile value.
JTF HTML Calendar Task Span Days	No	Site	The JTF HTML Calendar Task Span Days profile option sets tasks that spans over more than one day to appear continuously across days on your personal calendar.	Set the profile option to **Yes** to have your tasks that span over more than one day to appear continuously across days on your personal calendar. If the value is set to **No**, the task shows as a memo for each day affected.
JTF_PROFILE_DEFAULT_RESPONSIBILITY	22946	User	The JTF_PROFILE_DEFAULT_RESPONSIBILITY profile option sets the default responsibility when using calendar as a stand-alone application.	Set the value to correspond to the calendar user. The user value is 22946.
JTF_PROFILE_DEFAULT_APPLICATION	690	User	The JTF_PROFILE_DEFAULT_APPLICATION profile option sets the default application when using calendar as a stand-alone application.	Set the value to correspond to the calendar user. The user value is 690.

A.3.8 Escalation Manager Profile Options

The following table describes the profile options that are specific to Escalation Management.

Table A–8 Escalation Manager Profile Options

Name	Default Value	Level	Description	Outcome
Escalation: Close Only When De-escalated	Yes	Site	The escalation document cannot be closed (you cannot set up the escalation status to 'Close') without first changing the Escalation Level to 'De-escalated'.	If set to **Yes**, then it can regulate the escalation status change sequence from De-escalated to Close. If set to **No**, then it will not.
Escalation: Default Contact Type	Employee	Site	This profile option sets the default contact type to Employee in the Contacts tab.	You can also set it to **Customer**, and then it will default the contact type to Customer.
Escalation: Default Escalation Owner	Name	Site	This profile option sets the default escalation owner to a specific resource name, such as John Smith.	See description.
Escalation: Default Customer Contact Point	Phone	Site	This profile option sets the default customer contact point to Phone in the Contacts tab.	You can also set it to other values such as Cell, Email, Pager, or Web.
Escalation: Default Document Type	Task Manager	Site	This profile option sets the default document type to Task in the Document field on the Reference Document tab.	You can also set it to other values such as Service Request or Defects.
Escalation: Default Employee Contact Point	Work	Site	This profile option sets the default employee contact point to Work in the Contacts tab.	You can also set it to other values such as Home, Mobile, or Pager.
Escalation: Default Escalation Level	Level 1	Site	This profile option sets the default escalation level to Level 1.	You can also set it to other values such as Never Escalated, Level 2, or De-Escalated.
Escalation: Default Status	Open	Site	This profile option sets the default escalation Status field to Open.	You can also set it to other values such as Closed or Working.

Table A–8 Escalation Manager Profile Options

Name	Default Value	Level	Description	Outcome
Escalation: Default New Note Type	General Note	Site	This profile option sets the default note type to General Note if additional notes are attached to an escalation document.	You can also set it to other values such as Event or Approved.
Escalation: Default Notify (Y/N)	Yes	Site	This profile option sets the default Notify check box to "checked" in the Contacts tab.	You can also set it to No, which will leave the check box "unchecked" in the Contacts tab.
Escalation: Default Reason Code	Slow Progress	Site	This profile option sets the default escalation Reason field to Slow Progress.	You can also set it to other values such as Unacceptable Solution, or Unresponsive Owner.
Escalation: Default Reference Type	Escalation	Site	This profile option sets the default escalation reference type to Escalation in the Reference Document tab.	You can also set it to other values such as For Your Information.

A.3.9 Business Rule Manager Profile Options

The following table describes the profile options that are specific to the Business Rule Monitor.

Table A–9 Business Rule Monitor Profile Options

Name	Default Value	Level	Description	Outcome
Business Rule Monitor Workflow Administrator	No Default Value	Site	This profile option must be set first in order to grant this profile option to the BRM Workflow Administrator.	The Administrator can receive workflow notifications when the monitoring process starts and stops, and also when errors are detected.

A.3.10 User Management Profile Options

The following table describes the profile options that are specific to User Management.

Table A–10 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTF_PRIMARY_ USER	sysadmin	Site	Predetermines the username that corresponds with the "Universal Primary User Approver".	The supplied username corresponds to the Universal Primary User Approver.
JTF_ INDIVIDUALUSER_ ACCOUNT	Yes	Site	Enables automatic account creation for newly registered users.	When set to **Yes**, automatically creates a new account in the HZ_CUST_ACCOUNTS table for a newly registered user and associates the user with the account. Users must have an account to buy products in the iStore.
JTA_UM_ APPLICATION_ URL	None	Site	Specifies the application logon URL sent to users in email messages that are automatically generated once a user request has been approved.	The supplied URL is sent to users in email messages that are automatically generated once a user request has been approved.
JTA_UM_ WORKFLOW_ OWNER	sysadmin	Site	When a workflow is launched it always identifies the user who launched it. The system administrator is the default User Management workflow owner. User Management uses workflow for registration and for resetting passwords. Users can query workflows using the name of the workflow owner.	Specifies the name of the workflow owner.
JTA_UM_SENDER	None	Site	Provides a sender clause for automatically generated email messages such as approval and password expiration notifications.	The specified clause is sent with each automatically generated message such as approval and password expiration notifications.

Table A–10 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTF_UM_ APPROVAL_ OWNER	sysadmin	Site	.Defines the individual who serves as an escalation point of contact and who receives and approval request when the last approver fails to approve the request.	This profile option is used in the approval process. If the last approver in a predefined approval definition fails to approve a request, the person defined in this profile option will be the escalation point of contact and will receive the request. The user specified as the value for this profile option must have the JTF_SECURITY_ ASSIGN_ROLE permission
JTF_UM_ APPROVAL_ TIMEOUT_MINS	1440 Minutes (one day)	Site	Defines (in minutes) how long a workflow notification remains in a queue before it is timed out.	When the notification times-out, the request goes to the next approver on the list. If no approver is specified, the approval owner receives and answers the request. If you enter 0 as the default, no time out occurs. If no value is set, the profile option is defaulted to 0. The Process Time-out field in the parameters window when starting the "JTF Approval" workflow must be set to Yes for this profile option value to take affect.
JTF_UM_ APPROVAL_URL	None	Site	Defines the user application logon URL.	The URL is included in the workflow notification sent to each approver when they are assigned a request. The approver is sent an email message stating that the approver must approve a request.

Table A–10 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTF_UM_ MERCHANT_ NAME	None	Site	Defines the name of your organization.	Workflow inserts this name into request approvals and rejections when they are sent to the user.
JTF_ REGISTRATION_ CACHE	Yes	Site	Determines whether the registration pages will cache the data entered by the user during the registration flow.	If set to **Yes** and if the user presses the browser "Back" button, then the data entered on the previous page is available. If set to **No**, then the data (page) expires as soon as the user leaves the page.
ICX: Language	American English	Site	The ICX: Language profile can be set at the user level and determines the language displayed for the user when logging in.	The language for the registration page accessed from the "Register Here" link of the login page is determined by the ICX Language profile set for the "Guest User" defined in the System Administration console. To change the language for this page access the ICX: Language profile option, click the User field, and choose a language from the LOV.
JTA_UM_REG_ ORG_FAX_REQD	Yes	Site	Provides Yes/No values in the registration page that determine whether or not an organization's fax information is required.	The Organization Information page changes its required options depending on the values set for this profile option, however the fax field remains optional in the user detail page regardless of how this profile option is set.

Table A–10 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTA_UM_REG_ORG_PHONE_REQD	Yes	Site	Provides Yes/No values in the registration page that determine whether or not an organization's phone information is required.	The Organization Information page changes its required options depending on the values set for this profile option, however the phone field remains optional in the user detail page regardless of how this profile option is set.
SIGNON_PASSWORD_LENGTH	5	Site	Specifies the number of characters required to constitute a valid password.	When users define their password, the system will not accept passwords of fewer characters than the number specified in this profile option.
JTA_UM_HIDE_QUICKFIND	No	Site	Optionally hides the Quickfind menu.	When set to **Yes**, this profile option hides the Quickfind menu from users. When set to No, the Quickfind menu appears. The profile option is set to **No**, to ensure compatibility with previous versions of User Management that did not contain this feature.
JTA_UM_PASSWORD_GEN_WKF	None	Site	Specifies the name of the workflow used for sending passwords to users.	The workflow specified in this profile option sends passwords to users.

Table A–10 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTA_UM_SUPPORT_ CONTACT	Null	Responsibility	Specifies the name or email address of the support person to contact in case of logging errors.	The name and email address specified in this profile option are used to contact support in case of logging errors.
JTF_UM_EMAIL_ AS_USERNAME	No	Site	Optionally disables the User ID field in the registration screen and enables the user's email address to also function as the user ID.	When set to **Yes**, this profile option disables the User ID field in the registration screen and enables the user's email address to also function as the user ID. During the registration process, User Management populates the USER_ID column in the FND_USER table with the user's email address. When set to **No**, this profile option retains both User ID field in the registration screen and consequently does not populates the USER_ID column in the FND_USER table with the user's email address.

Table A–10 User Management Profile Options

Name	Default Value	Level	Description	Outcome
JTA_UM_DEFAULT_ ADDRESS_STYLE	US	Site	Determines the default country whose specific style of address fields must be displayed in the company registration page and user details page. When a user registers for the first time, the user must choose a country before entering address information. The country specified by this profile option appears by default. If User Management does not contain seeded data for the required country, then you must setup the address style using the Accounts Receivable flex fields. For instructions on configuring flexible address fields, see the Chapter 3 of the *Oracle Receivables User Guide*.	When the profile option is set for a specific country then the address fields required by that country's address style appear in the company registration page, and user details page. If the profile option is not set for a specific country of if there is an error displaying that country's address style then the registration and user details pages default to the U.S. address style. The registration process cannot be completed unless information is entered in mandatory address fields. The mandatory definition can be turned on or off for a given field from the flexfield segment definition, as a single address field maps to a segment of the address flexfield.

B Concurrent Programs

This appendix chapter contains information relating to concurrent programs.

These concurrent programs belong to Core Application Components and for additional functionality, you may need to run additional concurrent programs from the appropriate calling applications. Consult the calling application's documentation for additional information. Topics include:

- About Concurrent Programs
- Running Concurrent Programs
- Common Application Components Concurrent Programs

B.1 About Concurrent Programs

Concurrent programs are tasks run by a concurrent manager. A concurrent process runs simultaneously with interactive functions and other concurrent processes. A concurrent manager coordinates the processes generated by user's requests to run various data-intensive programs. A Foundation module can have several concurrent programs.

System administrator run concurrent programs periodically to update and synchronize their information.

B.2 Running Concurrent Programs

The following is a general procedure for running a concurrent program. Refer to the applicable chapter for specific information on running each specific concurrent program.

Prerequisites

None

Responsibility

CRM Administrator or

System Administrator

Navigation

Navigate to the Navigator - CRM Administrator window, or

Navigate to the Navigator - System Administrator window

Steps

1. Select **Request > Run.**

   The Submit a New Request window opens.

2. Select **Single Request**.

3. In the Name field in the Submit Request window, select your chosen concurrent program.

4. Enter additional information if necessary in the appropriate fields.

5. Click **Submit**.

B.3 Common Application Components Concurrent Programs

The following modules use concurrent programs:

- Resource Manager
- Task and Calendar

B.3.1 Resource Manager Concurrent Programs

The following table describes the types of seeded programs, their use, and the frequency in which you need to run them.

Table B–1 Resource Manager Concurrent Programs

Name	Description	Frequency	Notes
Build Reporting Manager	This program is redundant, and, has been replaced with the "Synchronize Reporting Managers", and "Populate Reporting Manager" concurrent programs.	Run only when data is modified	None
Synchronize Employees	This program is used to synchronize employee data in Human Resources. Note the difference in employee parameters: **Yes**: Synchronize all the employees that currently exist in Resource Manager. In addition, all new active employees in Human Resources are also imported **No**: Synchronize only the employees that currently exist in the Resource Manager.	Daily	For about 100,000 employees, this concurrent program should take about 10 minutes to run. It can be scheduled to run as a nightly process.
Flatten Employee Hierarchy	This concurrent program is ONLY meant to populate data in resource manager internal tables in order to expedite the data display in "Organization" link for Employee hierarchy.	Daily	Run this program after running Synchronize Employees For about 100,000 employees, this program takes about 2-3 minutes to run. So, it can be scheduled as a nightly process.
Flatten Group Hierarchy	This program is used to denormalize the Resource Group hierarchy structure into a flat structure for fast and easy data access.	Daily	Run this program after Synchronize Groups Denorm. For about 4000 groups, and average of 10 level hierarchy structure, this program takes about 10-15 minutes. It can be scheduled as a nightly process.
Synchronize Parties and Partners	This program keeps the Party Resource Name in Resource Manager in sync with information in TCA.	Daily	For 1 million party records in HZ_PARTIES, this concurrent program should take about 20 minutes to run. If the business is using a lot of Party type of resource, then this program can be scheduled to run on a nightly basis.

Table B–1 Resource Manager Concurrent Programs

Name	Description	Frequency	Notes
Synchronize Supplier Contacts	This program is used to synchronize supplier contacts of type person in Purchasing.	Daily	For 100,000 supplier contact records in PO_VENDOR_CONTACTS, this program should take about 20 minutes to run. If the business is using a lot of Supplier Contact type of resource, then the program can be scheduled to run every night.
Synchronize Application User Name	This program is used to synchronize the FND user name and resource table.	Daily	In a system comprising 50000 users, this concurrent program should take about 5 minutes to run. It can also be scheduled as a nightly process.
Synchronize Groups Denorm	This program is used to denormalize the Resource Group hierarchy structure into a flat structure for fast and easy data access.	The application runs this automatically	For about 4000 groups, and average of 10 level hierarchy structure, this program takes about 10-15 minutes. It can be scheduled as a nightly process. This program achieves the same results as "Flatten Group Hierarchy". The only difference between the two is that this program is kicked off automatically from the UIs where as the latter is used for cases where the data may have been created using Resource Manager APIs.
Group Audit Report	This program is used to obtain audit information for a particular resource group.	As needed	For a group, it should take no more than 1-2 minutes assuming normal system load and resource availability.
Group Structure Report	This program is used to obtain group structure information for a particular resource group. Given a group, it displays all the child groups, as well as all the immediate level members of the group. This information can also be obtained online through Resource Manager HTML windows.	As needed.	For a group, it should take no more than 1-2 minutes assuming normal system load and resource availability.

Table B–1 Resource Manager Concurrent Programs

Name	Description	Frequency	Notes
Resource Manager Diagnostics	This concurrent program is a diagnostic tool to be used for troubleshooting in case of some undesirable behavior. It generates an output containing various critical file versions that comprise the resource manager functionality.	As needed	None
Populate Reporting Manager	This program is used to populate data into an internal resource manager table which is accessed by Oracle Incentive Compensation team. This program should be used when Resource Group Membership data has not been entered through Resource Manager UIs, but, APIs instead.	As needed	In a system with 150,000 resources, and about 4000 groups, this program takes about 10-15 minutes. It can be scheduled as a nightly process if a lot of changes around Resource Group Membership is made daily.

Table B–1 Resource Manager Concurrent Programs

Name	Description	Frequency	Notes
Synchronize Reporting Managers	This program is used to populate data into an internal resource manager table which is accessed by the Oracle Incentive Compensation team. It is launched automatically from Resource Manager UIs.	As needed	In a system with 150,000 resources, and about 4000 groups, this program takes about 10-15 minutes. It can be scheduled as a nightly process if a lot of changes around Resource Group Membership is made daily.
Synchronize Workflow Roles	This program synchronizes all attributes and records in the workflow wf_local_* tables with the mismatching records in Resource manager.	As needed	This program should be run as follows: ■ The first time group notification functionality is implemented in Resource Manager. ■ When groups or resources that were not active at the time of their creation have become activated. ■ If online transactions encounter a Workflow error. ■ When the Synchronize Employees concurrent program is run. ■ When the Synchronize Parties and Partners concurrent program is run. ■ When the Synchronize Supplier Contact concurrent program is run.

Table B–1 Resource Manager Concurrent Programs

Name	Description	Frequency	Notes
Resource Skills Report	This program generates skill reports for resources reporting to a manager and for group members.	As needed	This program contains the following parameters: ■ Manager. When this parameter is entered, the program displays a hierarchical skills rating report for all resources that report to the manager including direct and indirect reports. ■ Group. When this parameter is entered, the program displays skill ratings for all group members. It does not display skill ratings for any child groups.

Note: It is strongly recommended that an employee, party, partner, or supplier contact not have more than one entry in FND_USERS. If an employee linked to two or more FND_USERS is imported into Resource Manager, then the USER_ID column in JTF_RS_RESOURCE_EXTNS table randomly picks a value from FND_USERS for that resource.

B.3.2 Task and Calendar Concurrent Program

The following table describes the type of seeded program, its use, and the frequency in which you need to run it.

Table B–2 Task Manager Concurrent Programs

Name	Description	Frequency
Rebuilding Intermedia Index for Task Names	This program is used to rebuild the intermedia index so a user can use the quick find to search for new and updated tasks as well as to search by task name.	As needed

Glossary

A B C D E F G H I J M N O P R S T U W

approval

An optional feature in User Management, whereby approvers can reject or approve new user accounts. In the User tab, the System Administrator Console provides windows so you can view, create, modify, delete, enable, and disable approvals, including those for specific organizations.

approval flow

The approval flow is a predefined flow of steps required to approve user registration or service enrollment requests in User Management.

assignee

An assignee is the designated person who is assigned to fulfill a specific task or assignment. If an assigned task cannot be completed by the assignee, then the owner of this task can reassign a new resource (assignee) to this task.

The assignee, can also be the owner of the task.

Assignment Manager

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 in the Assignment Manager.

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.

audit

An audit displays a history of changes that have been made to information in Oracle e-Business Suite.

automatic assignment

Automatic assignment refers to the matching of territories to resources resulting in a "Winning Territory" in Territory Management.

bins

Bins are small reports, which display high-level summary information in a tabular format on your homepage.

business rule

A business rule is a user-defined condition. When a rule is violated, a relevant workflow process can be triggered.

Business Rule Monitor (BRM)

The Business Rule Monitor is the engine that monitors documents over time against user-defined business rules.

business rule owner

A business rule owner is an employee resource who enforces the business rules.

business rule workbench

The Business Rule workbench is used to define a business rule in BRM.

business user

A business user is a typical Business to Business (B2B) user, associated with an organization. Generally, the Primary user(s) of the same organization approves these users.

Calendar (HTML)

The HTML Calendar is a tool to effectively manage your daily activities, appointments, and tasks.

Calendar (Forms)

The Forms-based Calendar is a scheduling tool used to define and view available and non-available time for a resource or group of resources.

calendar datebook

The calendar datebook displays time availability for yourself, a resource, or a group of resources in the Forms-based Calendar.

concurrent manager

The concurrent manager is a process manager that coordinates the processes generated by users' requests to run various data-intensive programs. An Oracle applications product group can have several concurrent managers.

contact

A contact contains information about a person and how to locate them such as their phone number and email address.

control tower

The Control Tower is a window in Field Service where you can view resource availability or assign resources to a task.

customer

Customers are typically primary users, Business to Business (B2B) users, business to Customer (B2C), and (individual) users.

customer relationship escalation

A customer relationship escalation is an escalation document that escalates multiple support requests, defects, or tasks.

customization

Customizations are enhancements to an Oracle Applications system made to fit the needs of a specific user community.

defect

A defect is a document that tracks product problems and resolutions in Escalation Management. A defect can be escalated without an associated service request. It is escalated through Oracle Quality Online (OQO), formerly known as the Defect Management System.

dependency

A dependency is where one task must complete before another. This functionality is only available in the Forms-based Task Manager.

dynamic group

A dynamic group is a group which is created based on your criteria by using SQL statements in the Resource Manager.

effective dates

Effective dates are the dates used by Oracle e-Business Suite to specify when something is going to begin.

employee

An employee is a resource type that represents a person who is hired to work for a company. Employee resources can be imported as resources from the Oracle Human Resources Management System (HRMS).

enrollment

Enrollment is a set of add-on services that you can receive during or after registration in User Management. One enrollment corresponds to zero or one responsibility, zero or one template, zero or one approval and zero or more roles. Enrollments are application specific and can be tied to user types.

escalation

An escalation is a modification of a process, a status, or both, to reflect an increased level of importance and a more immediate degree of response.

escalation management

Escalation Management is the process of managing proactive and reactive escalations. Proactive escalations are managed using the Business Rule Monitor and reactive escalations are managed using Escalation Manager.

Escalation Manager

Escalation Manager is a tool used to reprioritize, reassign, and monitor a situation, such as a service request or task, to a satisfactory completion.

escalation owner

An escalation owner is a person who oversees the escalation task, or document in Escalation Management. Once a task or document is escalated, the responsibility of the original owner of the escalated task is transferred to the escalation owner. For example, a defect is escalated to Rhonda Abbott and Rhonda becomes the escalation owner of this defect. John Smith, the original owner of the escalated defect, is no longer responsible for the defect.

escalation plan

An escalation plan is a series of follow up tasks that are attached to the escalation document.

exception

An exception is defined the time that a resource is not available in the Forms-based Calendar. Examples of exceptions include holidays, vacations, sick days, or weekends.

explicit enrollment

Explicit enrollments are enrollments that you manually register for during the registration process from the "Register Here" link in User Management.

forms

Forms are a logical collection of fields, regions, and graphical components that appears on a single screen. Oracle applications forms resemble paper forms used to run a business. You enter data by typing information into the form.

forms server

A Forms server is a type of application server that hosts the Forms server engine. It mediates between the desktop client and the database, providing input screens for the Forms-based products on the desktop client and creating or changing database records based on user actions.

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.

full access

Full access provides you with the ability to read and edit, and delete a record. This access type does not include the capability of granting access to others.

functions (privileges)

A function is an action that can be performed on an object or object instance. It can be granted to a user or user group that means gives them permission to perform that function. Therefore, a function can also be referred as a permission or privilege from a user's point of view.

Gantt Chart

The Gantt chart provides a graphical overview of the scheduled tasks for resources.

grant (authorization)

A grant is an authorization for the grantee (users, or user groups) to perform the specified object role on the specified object instance or object instance set.

group calendar

A group calendar is a calendar used only by its subscribers in the HTML Calendar. For example, a group calendar called Key Account can be used by any subscriber after the subscription is approved.

GUI

An interface used with personal computers and workstations that allows the user to access fields and regions of the screen with a pointing device, typically a mouse. The acronym is pronounced "goo-ee."

HTML (hypertext markup language)

HTML is a simple language used to format documents, predominantly for viewing with a web browser. Portions of text or images, called hypertext, can be associated with other documents.

HTTP (Hypertext transfer protocol)

The TCP/IP-based network protocol used to transmit requests and documents between an HTTP server and a web browser.

HTTP listener

An HTTP listener is a program on an HTTP server that accepts and processes incoming HTTP requests from web browsers.

implicit enrollment

These are enrollments for which a user is automatically registered for during the registration process using the "Register Here" link In User Management. The user is not asked to register for these enrollments. Instead, they are automatically attached to the user upon registration.

individual user

An individual user is an individual with no relationship to an organization in User Management. Generally, no approval is required for this type of user.

intelligent assignment option

The intelligent assignment option is used only in the Field Service Dispatch Center to assign the resource with the lowest cost.

JAR (java archive) file

JAR files are a collection of Java classes compressed into files for faster download to a desktop client.

java class

Java classes are components of a Java program that define objects and operations performed on objects. A Java class also identifies an operating system file that contains a program or part of a program written in Java.

JInitiator

Oracle JInitiator enables end users to run Oracle Developer Server applications directly within Netscape Navigator or Microsoft Internet Explorer on the Windows 95, 98, or 2000 and Windows NT4.0 platforms. Implemented as a plug-in (Netscape Navigator) or ActiveX component (Microsoft Internet Explorer), Oracle JInitiator allows you to specify the use of Oracle’s Java Virtual Machine (JVM) on web clients instead of having to use the browser's default JVM.

JSP

Java server pages are an extension to the Java servlet technology that was developed by Sun as an alternative to Microsoft's ASPs (Active Server Pages). JSPs have dynamic scripting capability that works in tandem with HTML code, separating the page logic from the static elements — the actual design and display of the page.

list of values (LOV)

A list of value is a predefined list of choices that the user has to chose from.

menus (roles)

A menu is a grouping of functions. It is required to group functions into related sets of menus necessary to perform a particular job role on an object instance. A good example is an "Administrator" menu, which might include many functions required for a user with an administrator role to perform his job. Therefore, menus can also be referred as roles.

merchant administrator (system administrator)

The Merchant or System Administrator is the main administrator of a company who approves requests for primary, business, and individual users in the User Management process. This System Administrator, who has the JTF_REG_APPROVAL permission, sees all the pending requests to be approved and is able to approve them.

merchants

Merchants refer to implementors of the Oracle E-Business Suite. This term is used to clear up any confusion with the term “customers”, which refers to customers of a business using Oracle products as opposed to those implementing the product.

Notes

Notes is a tool that provides additional text locations where you can specify more detail, if needed. A note can be added to a task.

note source

A note source is the originating module of the note. For example, if the notes are entered from a service request application, then the source of the note is Service Request.

note status

Note status determines note accessibility. For example, you can define a private note with status of Personal so that only you can see the note.There are three statuses available for notes that you can set:

- 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. This status is currently not used.

note text

A large type note, such as a customer's letter or directions.

note type

Note types 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.

Objects

An object is a type of thing on which security can be managed. For example, Tasks and Notes can be examples of an object.

In a technical definition, each object must be registered in the FND_OBJECTS tables. Every object definition will contain related database object (table or view) and primary key information for the object.

Object Instances

An object instance is a subset of an object. This generally corresponds to a row (or related set of rows) in the database. For example, if Notes is considered an object, then the Note with number 1541 is an object instance.

In a technical explanation, object instances are derived from the primary key values. The primary key values should be set for the registered object in the FND_GRANTS table.

Object Instance Sets

An object instance set is a group of multiple object instances. For example, all notes with a number smaller than 5 could be considered as an object instance set.

In a technical definition, object instance set definition is stored in the FND_ OBJECT_INSTANCE_SET table. The definition contains a SQL where clause, the predicate, that combined with the object definition will return all the object instances that are part of the object instance set.

OMO

OMO is an acronym for Oracle Marketing Online.

OSO

OSO is an acronym for Oracle Sales Online.

other/TBH

Other/THB is the only resource that is created and not imported in the Forms-based version of Resource Manager. Use this resource to create a salesperson that is going to be hired (TBH) but is not yet an employee.

owner

An owner is a resource person who oversees a task or a document. Use the Task Manager: Default Task Owner profile option to set the default to a specific owner. For example, tasks can be owned by a specific employee such as Ms. Marsha Able. This way she can oversee the work completed per task.

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.

party

A party is a person, group, or organization and is owned by TCA. Party relates to an employee, customer, or organization that can be related to a task.

permissions

A permission is the HTML equivalent to a responsibility.

platform

Within a resource 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.

PL/SQL

PL/SQL is a procedural extension of SQL that provides programming constructs such as blocks, conditionals, and functions.

port

In TCP/IP and UDP networks, a port is an endpoint to a logical connection. The port number identifies what type of port it is. For example, port 80 is used for HTTP traffic.

primary user

A primary user is a designated person of an external organization, like a business partner, who is responsible for some administrative functions on behalf of the external organization in User Management. In the case of registration the primary user is responsible for managing the registration and maintenance of users, accounts, and enrollments. Primary users of different parties may have access to different responsibilities and they may be granted different access rights.

privileges

Privileges define how a user can operate a system resource on a network or a file server. Privileges also define a right to execute a particular type of SQL statement or to access another user's object. For example, the right to create a table or session.

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.

profile option

A profile option is a set of changeable attributes that affect the way Oracle applications appear and how they function.You set profile options whenever you want the application to react in different ways for different users, depending on specific user attributes. They can be set at the user, application, site, or responsibility level.

proxy server

A server that sits between a client application, such as a Web browser, and a real server. It intercepts all requests to the real server to see if it can fulfill the requests itself. If not, it forwards the request to the real server.

public calendar

A public calendar can be used by everyone. Examples of public calendars can be corporate holiday calendar and local holiday calendars for branch offices.

read-only

Read-only access provides you with read-only capability. You cannot edit or delete any information.

recurrence

Recurrence is where a task is repeatedly assigned to a user in a pre-specified time increment such as daily, weekly, monthly, or yearly.

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 John Smith in an escalation document (number 11749), then this service request (number 9229) is a reference document.

reference

Reference is where one task relates to another document. For example, a task can be related to a service request.

reference type

A reference type specifies whether or not a reference document is escalated or used to provide additional information in Escalation Management.

registration

Registration is the process by which any user gains some access to the application's functionality.

registration self-service administration UI

The registration self-service administration UI is used by System Administrators, and at times primary users, to maintain external organization or internal group, users, parties, and accounts in User Management.

registration self-service user UI

The registration self-service user UI is used by the primary, individual, or business users to register themselves in User Management.

registration templates

Applications require varying pieces of information to register different types of users in User Management. Registration templates refer to JSP files that are used to capture the registration information that is special to a particular user type or enrollment.

repeating task

A repeating task is repeated in specified time increment such as daily, weekly, monthly, or yearly.

request owner

The request owner is the current approver based on the approver list and current state of workflow defined for a given approval in User Management. The request owner is only able to approve the requests which they currently own. This user should have "JTF_APPROVER" permission. The request owner is tied to the JTF_UM_APPROVAL_OWNER profile option.

resource

A resource is the basic element of the Resource Manager and is defined as people, places and things.

resource category

There are five types of resources defined in Resource Manager: party, employee, partner, supplier contact, other/to be hired (TBH).

resource 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.

Resource Manager

The Resource Manager is a tool used to define, access, and maintain all resources in Oracle e-Business Suite.

resource skill category

A resource skill 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.

responsibilities

Responsibilities are groupings of application menus that determine the user interface accessible to a particular user.

role

Roles are groupings of permissions, which are page level and function level granular privileges used to maintain application security.

role attribute

A role attribute is associated with a role. It defines the responsibility for each role in a group or team in the Resource Manager. For example, a Telesales Agent role represents the Member role attribute in a group, and a Sales Manager role represents the Manager role attribute in a group.

role type

A role type is a collection of roles associated with a particular module in Oracle e-Business Suite.

salesperson

A salesperson is a generic term used for any person involved in the sale or support of products and services.

self-service registration

Rather than asking an Administrator to register users manually, users can register themselves through a self-service UI in User Management. Self-service registration includes the UI and the background processes used to complete the registration process. This involves assigning users the correct data and UI access privileges.

service request

A service request is a document that tracks information about a customer's product and service problems.

servlet

A servlet is a Java program executed on an HTTP server, rather than downloaded to a desktop client.

shift

Shifts define a resource's availability to work in the Forms-based Calendar.

shift pattern

Shift pattern is a set of shifts, such as First Shift Monday through Friday 08:00 a.m - 05:00 p.m. in the Forms-based Calendar.

skills management

Skills management provides the ability to add a new skill rating to a resource in the Resource Manager. 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.

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.

source object

The source object is the originator of the task, note, or appointment; for example, Sales, Service, or Contract.

Spreadtable

A spreadtable is the user interface component that contains row, columns, and column headers set in a grid that can be embedded into an Oracle form.

SQL (structured query language)

SQL is an internationally standard language used to access data in a relational database. The acronym is pronounced "sequel."

SQL*Plus

SQL*Plus is an Oracle tool used to submit SQL statements to an Oracle database server for execution. It has its own command language.

SQL script

A SQL script is a file containing SQL statements that you run with a tool such as SQL*Plus to query or update Oracle data.

supplier contact

A supplier contact is the contact information for a person or agency that sells raw material or goods in the Resource Manager. Supplier resources can be imported as resources from the purchasing (PO) application.

system administrator

The System Administrator is the person who manages administrative tasks in Oracle Applications, such as registering new users and defining system printers, using the System Administrator responsibility.

task

A task is a discrete unit of work that is assigned to one or more individuals. Tasks are managed by the Task Manager. Tasks are often scheduled events and have defined expirations.

task 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.

task category

A task category as a way of organizing tasks. For example, the task can be a phone call and the category could be call back customer.

task creator

The creator is the originator of the task and defaults to the owner. However, the owner can be modified.

task template

A task template is a skeleton or surrogate task.

task group template

A task group template is a grouping of different task templates defined during setup.

Task Manager

Task Manager is a tool used to manage 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 owner

An owner is the person (resource) that creates and is responsible for the task.

task type

A task type defines the nature of the task such as a callback or a meeting.

TCP/IP (transmission control protocol / internet protocol)

A widely-used industry-standard networking protocol used for communication among computers.

team

A team is a collection of cross-functional resources. It is organized for the purpose of accomplishing a project in the Resource Manager. Team members are chosen for their availability, qualifications, and location. This functionality can be defined in the Forms version of Resource Manager only.

template handler

Template handlers refers to how the data flow built by other applications occur among registration and how they are associated with enrollments and user types in User Management.

Thin Client Framework (TCF)

The Thin Client Framework server is a middle tier process that enables certain Java components of the Oracle Applications user interface to communicate with the middle tier and database tier.

tier

A set of machines that perform similar tasks. Client/server is a two-tier architecture, with machines on the client tier connecting to machines on the server tier. Internet Computing Architecture consists of three tiers. In Release 11i, machines on the desktop client tier communicate with machines on the application tier, which in turn, communicate with each other and with machines on the database tier.

to do list

A to do list is a personal listing of things to do.

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 in the Assignment Manager.

universal primary user approver

Create a universal primary user approver if you want to have multiple primary users in User Management.

user

A user is a single person with an account on the system (represented by a row entry in FND_USER). Users can be referred as Grantee if they are the subjects of a data security grant. These users must be exposed in the WF_USER table.

Users can be grouped into groups.

user group

A user group is any grouping of FND_USERS who are exposed through the WF_ ROLES view. User groups can be referred as Grantee if they are the subjects of a data security grant. These user groups must be exposed in the WF_ROLES table.

user ID

The User ID is a combination of a username and its password.

User Management

User Management is a tool used to registering a user and thereafter maintaining the user in the system by granting or revoking privileges, accounts, customer profile information, and party relationships based on a set of business requirements set-forth by the organization where the process is deployed.

username

A name that grants access to a secure environment or program, such as an Oracle database or Oracle applications. A username is customarily associated with a collection of privileges and data available to a particular user (responsibilities in Oracle Applications). Every username is associated with a password.

user profile

User profiles, which are associated with responsibilities, are a set of user interfaces that give users access to their personal data and preferences.

user type

A user type is a category of users that caters to the specific needs of an application's business requirements in User Management. User types allow flexible and extensible ways for defining, categorizing and implementing behavior of users. A user type is associated to only one template, one responsibility, zero or one approval and zero or more roles.

web availability

Web availability is defined as a resource who has the immediate ability to attend to a service request that is assigned online in the Resource Manager.

window to promise assignment option

The Window to Promise assignment option is used only in the Field Service Dispatch Center to assign a resource to a specific time slot.

work

Work is broadly defined as a collection of items presented to an agent through the e-Business application to be processed. Work items can be either a media item or a task.

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.

workflow attributes

Workflow attributes control the behavior of the workflow.

workflow monitor

The workflow monitor is a Java based tool used for administering and viewing workflow process.