

Oracle® Common Application Components

User's Guide

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Oracle Common Application Components User's Guide, Release 11i

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Glossary

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Preface

Intended Audience

Welcome to Release 11i of the Oracle Common Application Components User's 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.
<i>lowercase italics</i>	Lowercase italics in the text represent variables. Substitute an appropriate value for the variable.

UPPERCASE	Uppercase characters within the text represent command names, SQL reserved words and keywords, and terms associated with the Oracle database.
Indentation	Indentation helps to show structure within code examples, but is not required.
<text>	Text inside angle brackets can mean either of the following: <ul style="list-style-type: none"> ■ 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.

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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 Common Application Components Implementation Guide contains instructions for implementing the User Management Framework.

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 Implementation Guide

The Implementation Guide contains important reference and background information on each of the Oracle Common Application Components. In addition, it contains procedures and implementing and System Administration tasks that are necessary to perform in each of the modules.

Oracle Common Application Components API Reference Guide

This manual describes the public, supported Oracle 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 CRM Installation Steps

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications

products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing *Oracle 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

This guide describes Oracle Workflow setup steps, the administrator Status Monitor, and administrative scripts.

Oracle Workflow Developer's Guide

This guide describes Oracle Workflow Builder including defining workflow processes, defining Business Event System (BES) events, subscriptions, agents, and systems.

Oracle Workflow API Reference

This guide describes 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

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Part I

Resource Manager

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Introduction to Oracle Resource Manager](#)
- [Overview of Using Oracle Resource Manager](#)
- [Managing Employee Resources](#)
- [Searching for Resources](#)
- [Managing Group Resources](#)

Introduction to Oracle Resource Manager

This chapter covers the following topics:

- [Overview of the Oracle Resource Manager](#)
- [Oracle Resource Manager Integrations](#)
- [Process Flow for Oracle Resource Manager](#)
- [What's New in This Release](#)
- [Terms and Definitions](#)
- [Resource Manager Rules for HTML](#)

1.1 Overview of the Oracle Resource Manager

Resource Manager enables other modules and applications to use resources no matter where they were created. It acts as a central repository for various types of resources. You can further define your resources by organizing them into groups and teams and assigning various roles to them. Whether or not resources are created in Resource Manager, you can import various types of resources, such as employees, suppliers, parties, or partners, which are created in other Oracle applications into Resource Manager. Once imported, they become available for other modules and applications to use. You can also update information about resources (which were created in other applications) by using a variety of concurrent programs to synchronize your information.

Resource Manager can be accessed from Forms and HTML depending on use and who is using it. Furthermore, depending on whether or not it is used as a stand-alone module, or if it is integrated with other applications or modules, its appearance can change. For example, when coupled with the HTML Calendar,

Resource Manager appears as a tab labeled "People". This section covers the following topics:

- [What is the Resource Manager?](#)
- [What are Resources?](#)
- [Understanding Roles](#)
- [Understanding Groups](#)
- [Determining Group Hierarchy](#)
- [Understanding Teams](#)
- [What is a Salesperson?](#)
- [How are the Different Resource Names Fields Used?](#)

1.1.1 What is the Resource Manager?

Resource Manager provides lists of resources, as individuals, groups, and teams, for applications to access and manage their resources. Defining and organizing your resource information makes your resources available to the calling application modules for work action.

Use Resource Manager to:

- **Import employees** from Oracle HRMS, parties and partners from Oracle Accounts Receivables, and supplier contacts from Purchasing.
- **Identify resources as salespeople.** The only resource you can define in the Forms-based Resource Manager is a salesperson. In the HTML-based Resource Manager, you can define and identify employee resources as salespeople. This employee information is also recorded in the Oracle Human Resources Management System (HRMS) tables and automatically becomes a CRM resource.
- **Assign additional attributes to the resources** so that these resources can be used by other applications. In the Forms-based Resources window, you can enter or view additional information in the Service, Interaction Center, Compensation, or Receivables tab for any selected resource.
- **Create a resource group and team structure** by using Resource Manager to better manage resources for particular business needs. Team resources can be created in the Forms-based Resource Manager only.

- **Assign individual resources with resource roles and role types to groups and teams.** This allows you to assign groups of people with the appropriate resources to specific tasks.

Example

Sue Smith, a new sales manager at Vision, Inc. wants to establish all her employees and outside contacts in the E-Business suite. She imports her subordinate group of salespeople from HRMS, her list of top ten customers (parties) from various customer accounts, and her list of plant managers (supplier contacts) from the companies that design and engineer her products. To make sure her sales team gets paid their commissions, she defines each one as a salesperson. This information is recorded in the HRMS tables.

To make her organization more efficient, Sue decides to create two resource groups, one of all her outside salespeople and one for all her inside sale people. She also decides that an upcoming sales campaign will need a group of cross functional people to target her goal. So she also creates a team called Campaign Z. This team is made up of ten sales people, six marketing representatives, two collateral writers, and a project manager to oversee the group.

1.1.2 What are Resources?

Resources are defined as the employees, supplier contacts, parties, and partners that are used by the different CRM components to accomplish business objectives. The following table describes all five resource categories used in Resource Manager.

Table 1–1 Resource Category Descriptions

Resource	Description
Employee	An employee is a person who has been hired to work for a company. Resources of type "Employee" are imported as resources from Human Resources Management System (HRMS). Examples of an Employee resource include a Sales Representative or a Field Service Engineer.
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Resources of type "Supplier" can be imported as resources from the Oracle Purchasing (PO) application. An example of a supplier contact is a Sales Representative or Field Service Engineer who is a contact for a vendor.

Table 1–1 Resource Category Descriptions

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

Resources can be organized into groups and teams. Each group or team is defined in one of two ways, a role or a role type.

1.1.3 Understanding Roles

Roles

A role can encompass one or more job descriptions and job titles (Field Service Representative), or functions within the applications (such as default marketing approver, MES_Publish, and Channel_Manager). You assign roles to resources, resource groups, and resource teams. For example, the seeded roles for Sales include manager, administrator, approver, and representative. The seeded roles for Telesales include manager, administrator, and agent. You can define custom roles for your business needs. Ensure that a role type exists so that you can associate the new role.

Role Types

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

Example

Think of role types as a "family" and its members as having the various "roles" with in the family.

Sales (role type)

Roles: manager, administrator, representative, and sales approver

Role Attributes

Role attributes are associated with each role, and define its responsibility within the group. In addition to these responsibilities, a role attribute can also be designated as active (currently), and seeded (available out-of-the-box).

There are four seeded role attributes that can be associated to roles at role creation:

- **Member:** Default when another attribute is not chosen (Lead, Administrator, Manager.)
- **Lead:** Used in the context of team lead.
- **Administrator:** Used to grant this user permission to view information about other group members. In the HTML-based Resource Manager, only a user in a group with either the Administrator or Manager group member role attribute 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 will roll up to the person with the Manager role attribute in that group. In addition, a user with the Manager group member role attribute can update the group member and group hierarchy information in the HTML Resource Manager.

You use these role attributes to define how a resource is 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 through the group functionality. It is also used for workflow notifications and escalations. For example, if you set up an escalation for service requests and tasks, notifications for members of groups go to the manager.

Example

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

Table 1–2 Example of Roles, Role Attributes, and Role Types

Role Type	Seeded Roles	Role Attribute
Sales	<ul style="list-style-type: none"> ▪ Manager ▪ Administrator ▪ Approver ▪ Representative 	<ul style="list-style-type: none"> ▪ Manager, Active, Seeded ▪ Admin, Active, Seeded ▪ Member, Active, Seeded ▪ Member, Active, Seeded
Telesales	<ul style="list-style-type: none"> ▪ Manager ▪ Administrator ▪ Agent 	<ul style="list-style-type: none"> ▪ Manager, Active, Seeded ▪ Admin, Active, Seeded ▪ Member, Active, Seeded

See Also

- [Understanding Groups](#)
- [Understanding Teams](#)

1.1.4 Understanding Groups

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

Resource Groups

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

Group Member Roles

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

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

Group Roles

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

1.1.5 Determining Group Hierarchy

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

Example

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

1.1.6 Understanding Teams

You create Teams **only** in the Forms-based Resource Manager. The following concepts are useful in understanding the Teams function in Resource Manager.

Resource Teams

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

Team Member Roles

Each team member, whether or not it is an individual resource or a resource group, can have multiple roles assigned to a team. For example, a team member can have both Sales Manager and Sales Representative roles due to resource constraints in a team.

Team Roles

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

1.1.7 What is a Salesperson?

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

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

Example

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

In addition to imported resources, the only resources you can create, and not import, is a salesperson with resource category of OTHER, or TBH (to be hired) in Forms, and a salesperson in HTML.

1.1.8 How are the Different Resource Name Fields Used?

There are several name fields that are associated with Resource Manager:

- Employee Name

- Source Name
- Resource (Preferred) Name
- Salespersons Name
- User Name

An **employee name** is usually your legal name. It is also the **source name** which you can see in the Forms UI. The **source name** derives from HRMS before the resource is imported, or when a resource is created in Resource Manager.

The **resource (preferred) name** is the name that is available to the other modules or applications from Resource Manager. For example, perhaps your first name is difficult to pronounce and you have always used a nickname. That nickname is your resource name.

The **salespersons name** is not visible in either of the Forms or HTML UIs but is recorded in the Resource Manager Salesreps table. However, there is a Salesperson Name field in the HRMS application.

The **user name** is generally one brief name that is used for e-mail and logging into applications and it never changes.

Understanding the Differences of the Various Name Fields

An employee can be created in HRMS. When the employee is imported into Resource Manager, the full name is populated in the Resource Name and Source Name fields. If the resource is also a salesperson, then the salespersons name is populated with the resource name. Any changes made to the resource name, are automatically reflected to the salespersons name.

Note: The resource name and salespersons name are always the same regardless of resource category. The source name and employee name are always the same for category Employee.

Example

Penelope Smith joins Vision Enterprises as a salesperson. Her employee data was created in HRMS, and imported into Resource Manager.

Resource Name:	Penelope Smith
Source or Employee Name:	Penelope Smith

Salespersons Name: Penelope Smith

Her customers know her by the nickname Penny. So she changes her resource name in the HTML version of Resource Manager to Penny since that is what she prefers people to call her.

Resource Name: Penny Smith
Source or Employee Name: Penelope Smith
Salespersons Name: Penny Smith

Later in the year she marries and decides to use her husband's last name, Jones. So HRMS changes her last name as requested and the Resource Administrator runs the Synchronize Employees concurrent program. At this time, she prefers to use her given name so customers will not be confused.

Resource Name: Penny Smith
Source or Employee Name: Penelope Jones
Salespersons Name: Penny Smith

Later in the year, she decides that she wants to append her new last name to her maiden name. The Resource Administrator changes her resource name accordingly which is reflected in her salespersons name as well. In this example, the Synchronize Employees concurrent program was run.

Resource Name: Penny Smith-Jones
Source or Employee Name: Penelope Jones
Salespersons Name: Penny Smith-Jones

Later in the year, she decides that she wants to append her new last name to her maiden name. The Resource Administrator changes her resource name accordingly which is reflected in her salespersons name as well. In this example, the Synchronize Employees concurrent program was not **run**.

Resource Name:	Penny Smith-Jones
Source Name:	Penelope Jones
Employee Name:	Penelope Smith-Jones
Salespersons Name:	Penny Smith-Jones

1.2 Oracle Resource Manager Integrations

The entire CRM suite uses Resource Manager to import and view resources, define resources (salespeople), define roles and role types, create teams and groups, and organize resources within those teams and groups.

For example, the following CRM modules use Resource Manager to define or schedule resources:

- **Marketing** uses Resource Manager to set up marketing groups and execute marketing campaigns.
- **Service** uses group and team lists of resources from Resource Manager for service request assignments.
- **iSupport** uses Resource Manager to set up support groups to fulfill service and support needs.
- **Incentive Compensation** uses Resource Manager to set up sales representatives and sales compensation group hierarchies.
- **Call Center** uses Resource Manager for call center routing.
- **Sales Online** uses Resource Manager to set up a sales hierarchy.

The following Oracle Common Application Components also use Resource Manager:

- **Forms-based Calendar** uses Resource Manager to track the availability of resources.
- **Assignment Manager** uses Resource Manager to provide a list of qualified resources.
- **Territory Manager** uses Resource Manager to select the resources for a particular territory.
- **Task Manager** uses Resource Manager to provide single, group, and team lists of resources for task assignments.

Resource Manager uses the concept of the Oracle Trading Community Architecture (TCA). You can import resources from the following different sources:

- Resources of category “Party” and “Partner” can be imported from Accounts Receivables (AR) to Resource Manager and can become available resources. You can only import partners that are defined as an organization, however you can subsequently define the imported party as a sales person and assign it a sales number and other relevant information.
- Resources of category “Supplier Contact” can be imported as resources from one or more supplier sites. When importing supplier contacts from Purchasing (PO), the supplier contact must exist in the PO_VENDOR_CONTACTS table and be effective on the given date of import.
- Resources of category “Employee” can be imported as resources from Human Resource Management System (HRMS). The employee must exist in table PER_ALL_PEOPLE_F and be effective on the given date of import.

1.3 Process Flow for Oracle Resource Manager

The following table describes the order and process of using Resource Manager.

Table 1–3 Resource Manager User Process

Steps	Description	Type	Performed By
View and Update: <ul style="list-style-type: none"> ■ Personal Information ■ Organizational Structure ■ Group Membership Information 	<ul style="list-style-type: none"> ■ (Optional) View and update your personal information to keep it current. ■ Use the organizational structure to view managers and subordinates. ■ View and update Group membership information. 	HTML	All Users
<ul style="list-style-type: none"> ■ View and Define a Skill Rating ■ Change the Name of a Skill Rating ■ Assign a Numeric Value to a Skill Rating 	<ul style="list-style-type: none"> ■ (Optional) View a resource's skill rating, as well as define your own skills. This allows others to see where your level of expertise is, for example if your manager was manually reassigning a service request through the Assignment Manager module and needed someone who was immediately available and with your set of skills. ■ (Optional) The Skill levels are editable, but you cannot delete any of them without entering a new name or its value. ■ (Optional) Convert the skill rating to a numeric system. 	HTML	All Users Only the System Administrator can assign a numeric value to a skill rating.
Search for Resources	(Optional) Use Resource Manager to search for a resource.	Forms HTML	All Users
Define Group Hierarchy	(Optional) Use Resource Manager to define group hierarchy.	HTML	All Users
View: <ul style="list-style-type: none"> ■ Role Types ■ Roles ■ Role Attributes 	(Optional) Use Resource Manager to view role types, roles, and role attributes to verify they are consistent with your business logic.	Forms HTML	All Users

1.4 What's New in This Release

This release of Oracle Common Application Components has the following new features in Resource Manager subsequent to the 11.5.8 release:

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 Manager 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 appropriate 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.

1.5 Terms and Definitions

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

Table 1–4 Resource Manager Terms and Definitions

Term	Description
Employee	An employee is a person who has been hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).
Resource Manager	A single place for defining, accessing, and maintaining all CRM and ERP resources.
Category	A category is the highest level that a resource can be rated in relation to skills management. If a resource is rated at the category level, and not rated at any one of the product, platform, or product code levels, it does not imply the resource is also rated at those levels. Categories can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Component	Within a product in skills management, there are numerous components. A resource can be rated individually for each of those components. Components can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Other/TBH	This is the only resource that is created and not imported. Use this resource to create a salesperson that is going to be hired (TBH) but is not yet an employee.
Partner	A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits. A Partner resource can be imported as resources from Accounts Receivables.
Party	A party is an entity that can enter into a business relationship. A party resource can be imported as resources from Accounts Receivables.
Platform	Within a category, there could be numerous platforms in Skills Management. A resource can be rated individually for each of those platforms. Platforms can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Problem Code	Within a category in Skills Management, there could be numerous problem codes. A resource can be rated individually for each of those problem codes. Problem Codes can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.

Table 1–4 Resource Manager Terms and Definitions

Term	Description
Product	Within a category in Skills Management, it is possible to have numerous products. A resource can be rated individually for each of those products. A product can be sub-divided into components. Products can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Resource	A resource is the basic element of the Resource Manager and is defined as people, places and things.
Resource Category	There are five types of resources: Party, Employee, Partner, Supplier Contact, To Be Hired (TBH), and Other.
Skills Management	Skills Management provides the ability to add a new skill rating to a resource. The resource can update and maintain their skill rating, attach a numeric value to each skill level, and change the actual name of each skill level.
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Supplier resources can be imported as resources from the Purchasing (PO) application.
Workflow	Oracle Workflow automates and continuously improves business processes, routing information of any type according to business rules you can change. 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: <ul style="list-style-type: none"> ■ 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

1.6 Resource Manager Rules for HTML

Resource Manager has several rules it follows for security purposes:

- The logged in user can only modify his information.
- A user can not update their own job title.
- A manager of a group cannot change his directs personal information except for skills.

- An administrator can change any resource's personal information.
- Group Hierarchy is the ability to alter the group structure.
 - A member of a group who has a role within that group and the role type of admin can update the group hierarchy.
 - A member of a group who has a role within that group and the role type of admin can edit group structure of the child groups of the parent group where they have this role.
 - A manager of a group who has a role within that group and the role type of admin or manager can update the group hierarchy.
 - A manager of a group who has a role within that group and the role type of admin or manager can edit group structure of the child groups of the parent group where they have this role.
- Skills Management is the ability to rate resources based on skill level.
 - Only positive integers are acceptable for skill ratings.
 - No two skill ratings can have the same numeric value.
 - You cannot change the numeric value of the category N/A.
 - Skill rating names are editable for specific business needs.
 - No two skill ratings can have the same name.
 - A resource's manager cannot add or modify new skill levels to his subordinates.
 - Any user can view a resource's skill rating.
- Web Availability is the ability for a resource to make their status Web available or unavailable in Forms.
 - Only the logged in resource can make their status available or unavailable.

Overview of Using Oracle Resource Manager

This chapter covers the following topics:

- [Accessing Oracle Resource Manager Interface](#)
- [Summary of Oracle Resource Manager Tasks](#)

2.1 Accessing Oracle Resource Manager Interface

The Resource Manager can be called from other applications. In HTML, it is a tab, called "People" within other applications or modules. Therefore the responsibilities and navigation path will vary. The following tables describes how you can access the Resource Manager:

Table 2–1 Resource Manager Navigation Paths

Description	Responsibility	Navigation Path
The Stand-alone Forms-based Resource Manager	<ul style="list-style-type: none"> ■ CRM Administrator or ■ CRM Resource Manager responsibility 	Select Resource Manager in the Navigator window.
The Stand-alone HTML-based Resource Manager	CRM Application Foundation User responsibility	Select the People tab. Use the Employees subtab or Groups subtab to access the employee or group resource windows.
HTML-based Resource Manager for administrative duties	Resource Self Service Administrator responsibility	Select the Administration tab to access the setup windows.

Table 2–1 Resource Manager Navigation Paths

Description	Responsibility	Navigation Path
The Forms-based or HTML-based Resource Manager from other CRM applications	Resource Manager can be accessed through different CRM applications. Example: You can create group resources in Forms by selecting the Customer Support responsibility.	Example: Select Resource Manager > Maintain Resources > Groups.

Note: There is a bug in the Netscape browser that can affect Resource Manager. Do not use the Back button, as you may lose your data. It is recommended that you use the Resource Manager user interface (UI). The Internet Explorer browser does not have this issue.

2.2 Summary of Oracle Resource Manager Tasks

Use Oracle Resource Manager to perform the following types of tasks:

- [Chapter 3, Managing Employee Resources](#)
- [Chapter 4, Managing Group Resources](#)
- [Chapter 5, Searching for Resources](#)

Managing Employee Resources

This chapter covers the following topics:

- [Viewing Resource Information](#)
- [Defining Your Personal Information](#)
- [Viewing Your Organizational Structure](#)
- [Defining your Skill Rating](#)
- [Viewing a Resource's Skill Ratings](#)
- [Making a Resource Web Available](#)

3.1 Viewing Resource Information

In HTML, by clicking the Preferred Name hyperlink in the Employees window, you can open the Resource Details window to view and maintain resource information. Perform the following steps to view resource information.

Note: Your ability to modify resource fields depends on your which responsibility you use to access Resource Manager.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

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

The Resource Detail window opens with your personal information.

See Also

- [Defining Your Personal Information](#)
- [Viewing Your Organizational Structure](#)

3.2 Defining Your Personal Information

Your personal information is maintained by you, or a resource administrator with the Resource Self Service Administrator responsibility only. Your direct manager cannot update your personal information, but can view it.

In HTML, by clicking the Preferred Name hyperlink in the Employees window, you can open the Resource Details window to maintain personal information. Perform the following steps to define or change your personal information.

Note:

- Click the People tab to return to the Employee summary window.
 - Use the links following the navigation bar to quickly navigate to the designated section within the Resource Details window.
 - Fields can only be updated if set by the administrator.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. After you log in to the Resource Manager, the Employee's window opens with your employee details. The information that appears is based on the user login.
2. Click your preferred name.
3. (Optional) Update your preferred name.
4. (Optional) Enter your various numbers:
 - Work
 - Mobile
 - Pager
5. Enter your email address.

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

6. Enter your personal information:
 - a. Enter search criteria for your Job Title (at least three characters) and click **Go** to search for matching titles.

The Select a Job Title window opens.
 - b. Click your job title to populate the field.
 - c. To search for your manager, enter at least three characters and click **Go**.
 - d. Click on your manager's name to populate the text field.

The category (Employee), resource number, source number, and start date are automatically populated.
 - e. (Optional) Enter your end date.
7. Enter your location information following the Work Location heading.
 - a. Use the drop-down to select your work address.
 - b. Enter your office number.
 - c. Enter your mailstop.
 - d. Enter your office location.

8. Under the Sales Team Details heading, your salesperson number is automatically populated.
9. Use the drop-down list to select a sales credit type.
10. Under the Service Heading, enter the following information:
 - a. Use the drop-down list to select your time zone.
 - b. Use the drop-down list to select the support site.
 - c. Use the drop-down lists to select your primary and secondary languages.
 - d. Enter a numeric value for your pay rate per hour.
11. Under the Resource Roles heading, define the following information:
 - a. Use the drop-down list to select the role type.
 - b. Click **Go** in the role column to select the role that corresponds to the role type.
 - c. Click on the role to populate the text field.

The start date is automatically populated with the current date.
 - d. Enter the end date in the following format (24-Jul-2001) or click the **Date Picker** to select a date.
12. Under the Group Membership heading, enter your group membership information.
 - a. Enter search criteria for the group name (at least three characters) and click **Go**.

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

The Select a Role window opens.
 - e. Click the role to populate the field.
 - f. Enter the start date in the following format (24-Jul-2001) or click the **Date Picker** to select a date.
 - g. Enter the end date in the following format (24-Jul-2001) or click the **Date Picker** to select a date.

Note:

- Click the People tab to return to the Employee summary window.
 - If changes are made to the employee's manager field in the Resource Details window, then the Flatten Employee Hierarchy concurrent program should to be run in order to reflect the changes in the organization chart when you view them. Refer to Appendix B in the *Oracle Common Application Components Implementation Guide* for details on running Concurrent Programs.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. The Employee's window opens (default) with your employee details.
2. Click **Organization** from the side navigation bar.
Your organizational structure, including information about you and your manager, appears in the Details window.
3. To see the next upper level, click the job title hyperlink.

See Also

- [Viewing Your Personal Information](#)
- [Defining Your Personal Information](#)

3.4 Defining Your Skill Rating

Using Skills Management, a resource can maintain their skills at various levels including category (such as CRM or ERP), product name (1198 – Oracle Common Application Components), product component (JTF_RES), platform (Sun Server), and problem code (such as fix server, install problem, or documentation problem). These ratings are used by customer support teams to select the best resource to assign to a service request. Perform the following steps to rate the resource skill at the category level.

Example

Rhonda Abbott, a support agent, has experience in Resource Manager, one component within Oracle Common Application Components. After logging in, she can select herself in the Employees window, and then select Skills from the side bar to access the Skills window. Clicking the Add New Skill button to open the Rate Skill window, she can then select appropriate category code (CRM), type (Product), product name (Common Application Components), and product component name (Resource Manager). Rhonda can rate herself as “Experienced” in the Level field for this specific product component. By clicking the Create button, Rhonda can view her skill summary information in the Skills window.

Note:

- Category, Product Name and Component information are set up in Oracle Inventory.
 - If a Problem Code or Platform is selected in the Type field, then the Component field is not available.
 - Managers and team leads can review and adjust a subordinate’s ratings.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. After logging in to Resource Manager, the Employee's window opens with employee details.
2. Click on your preferred name.
3. Click **Skills** on the side navigation bar.
4. Click **Add New Skill**.
5. Click **Go** next to the Category text field.
6. Click the category you want to use.

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

7. Use the drop-down list to select a Type. Options include: Platform, Problem Code, or Product.

Note: If you want to assign a problem code to a product within a category then choose Product from the drop-down list. When the page refreshes, you can optionally specify a problem code for the product. If you want to assign a problem code directly to a category, choose Problem Code from the drop down menu. When the page refreshes no product information is associated with the problem code.

8. Click **Go** next to the Name text field.

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

9. Click the choice you want to use.

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

10. If you select Product:

- a. Click **Go** next to the Component text field.

The Select a Component window opens.

- b. Select the component you want to use.

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

- c. Choose one of the following radio buttons:
- **Cascade All.** When a product is rated, this option cascades that rating to all of the product's components regardless of whether or not the are already rated.
 - **Cascade.** When a product is rated, this option cascades that rating to any of the product's unrated components.
 - **No Cascade.** When a product is rated, this option does not cascade that rating to any of its components.

11. Use the drop-down list to select your Skill Level. Options include: Not Applicable, Expert, Experienced, Knowledgeed.

12. Click **Create**.

The new skill is added to the Skills window.

3.5 Viewing a Resource's Skill Ratings

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

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. After logging in to Resource Manager, the Employee's window opens with your employee details.
2. Search for the resource whose skill rating you want to view.
3. Click the resource's preferred name.

The Resource Details window opens.

4. Click **Skills** on the side navigation bar.

The Skills window opens with a list of skills and ratings.

5. Click the skill to view the details.

See Also

[Defining Your Skill Rating](#)

3.6 Making a Resource Web Available

The purpose of making a resource web available (or unavailable) is so they can instantly be assigned a task through the web. This feature is only available in Oracle Support Service (OSS) and is only Forms-based. Using this functionality, logged in users can set whether or not web service requests can be assigned to them. This action can be done automatically (through backend processes) or manually through the Assignment Manager. In the Assignment Manager, a supervisor can view who is web available and make an appropriate decision.

Note: Whenever a resource is newly created or imported into the Resource Manager, they are web available by default.

Prerequisites

None

Responsibilities

Customer Support responsibility

Navigation

Navigate to the Navigator - Customer Support window

Steps

1. Select **Service Requests > Create Service Requests or Search Service Requests**.
The Create Service Requests or Search Service Requests window opens.
2. Select **Tools > Web Available**.
3. Check the Available check box.

Managing Group Resources

This chapter covers the following topics:

- [Viewing Your Group Membership Information](#)
- [Defining Your Group Membership Information](#)
- [Defining Group Hierarchy](#)
- [Viewing Your Group Membership History](#)

4.1 Viewing Your Group Membership Information

Perform the following steps to view your group membership information.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. After you log in to the Resource Manager, the Employee's window opens with your employee details.
2. Click your preferred name.
The Resource Detail window opens with your personal information.

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

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

See Also

- [Defining Your Group Membership Information](#)
- [Defining Group Hierarchy](#)
- [Viewing Your Group Membership History](#)

4.2 Defining Your Group Membership Information

Maintaining group membership information is an essential function required by sales and service managers. By using the Group Detail window, a user with appropriate access (with either the Admin or Manager group member role) is able to maintain group information. These activities include: changing the group name, e-mail, effective date, the ability to add additional resources to a group with appropriate member roles, end date a resource's role and remove a resource's role.

Perform the following steps to define your group membership information.

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

Prerequisites

- Only a group member with a role of Admin or Manager can update group information.
- The JTFRS: Group Update Access profile option must be set to None for a group member to be able to update group information.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. In the Group Usages region, use the drop-down list to select the usage.
2. In the Members region, use the drop-down list to select a resource category. Options include: Employee, Other, Partner, Party, Supplier Contact, and To Be Hired.
3. Enter at least three characters or enter "%%%" to search all resources and click **Go**.

The Select a Resource window opens.

4. Click the resource to populate the field.
5. Use the drop-down list to select a Role Type.
6. Enter at least three characters or enter "%%%" to search all roles and click **Go**.

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

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

See Also

- [Viewing Your Group Membership Information](#)
- [Defining Group Hierarchy](#)
- [Viewing Your Group Membership History](#)

4.3 Defining Group Hierarchy

To maintain group hierarchy information by selecting the Hierarchy hyperlink from the side navigation menu, a user with appropriate access (with either the Admin or Manager group member role) can add additional child or parent groups, as well as set an end date to an existing child or parent group.

Who Has the Update Ability? Not every member within a group can update their group information. Only a group member with a role of Admin or Manager role assigned to it can perform these activities. In addition, the JTFRS: Group Update

Access profile option must be set to None. The Admin or Manager role attribute can be identified when you click the Go button to open the Select a Role window. These attributes are defined in the setup window. Perform the following steps to define your group hierarchy information.

Note:

- If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.
 - A person in a group with the role of Manager or Admin can change his or her role and group hierarchy information but not phone or address information.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. With the Group Detail window open, click **Hierarchy** in the side navigation bar.
The Group Detail Child and Parent Groups window opens. The name, description, start date, end date, and email appear in the window (if available) in the top portion of the window.
2. Click the Group Name to view group details.
3. In the Parent Groups region, enter at least three character in the Group Name field or enter "%%%%" to search all roles and click **Go**.
The Select a Group window opens.
4. Click the group to populate the group name and description.

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

See Also

- [Viewing Your Group Membership Information](#)
- [Defining Your Group Membership Information](#)
- [Viewing Your Group Membership History](#)

4.4 Viewing Your Group Membership History

Perform the following steps to view your group membership history.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. Navigate to the Details window.
2. Scroll down to view your active group memberships.
3. Click **Show History** in the lower portion of the window to view any inactive group memberships.

Note: There is a bug in the Netscape browser that can affect Resource Manager. Do not use the Back button, as you may lose your data. It is recommended that you use the Resource Manager user interface (UI). The Internet Explorer browser does not have this issue.

See Also

- [Viewing Your Group Membership Information](#)
- [Defining Your Group Membership Information](#)
- [Defining Group Hierarchy](#)

Searching for Resources

This chapter covers the following topics:

- [Using the Quick Find Search](#)
- [Initiating an Advanced Search for an Employee](#)
- [Initiating an Advanced Search for a Group](#)

5.1 Using the Quick Find Search

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

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. Using the Quick Find drop-down list, select search criteria:
 - Employees
 - Groups

2. Enter a keyword or character for the search (at least three characters). To search for all employees or groups, enter "%%%" and click **Go**.

The Search Results window opens with a list of resources containing the specified character.

3. Click any item to display the details.

Note: It is possible to see the name of a resource be repeated several times. You can have resources with the same name, or even the same employee number. Click on the individual resource to view the details such as different e-mail addresses, different manager names, different locations.

See Also

- [Initiating an Advanced Search for an Employee](#)
- [Initiating an Advanced Search for a Group](#)

5.2 Initiating an Advanced Search for a Resource

You can further define your search criteria by using the Advanced Search function. Perform the following steps to search for a resource.

Note: The Preferred Name field displays only if the value of the profile "JTFRS: Resource Lookup Audience" is "ADMIN".

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

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

The Advanced Search window opens.

2. Enter as much information as possible for your search criteria. Fields include:
 - Employee Number
 - Resource Number
 - Preferred Name (Use this field to search for resources of Other or TBH.)
 - User Name
 - Salesperson Number
 - Work Phone
 - Email
 - First name
 - Last Name
 - Manager Name
 - Job Title
3. Click **Search**.

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

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

See Also

- [Using the Quick Find Search](#)
- [Initiating an Advanced Search for a Group](#)

5.3 Initiating an Advanced Search for a Group

Perform the following steps to search for a group resource.

Note: The date range will return all the groups which are active during the user input active date range.

Example:

Group From Date End Date

G1	01-JAN-51	NULL
G2	01-JAN-01	NULL
G3	01-JAN-01	01-SEP-01
G4	01-SEP-01	NULL

If you input in the search window for Active from Date as 02-SEP-01 and End Date as empty. The Expected result is: G1, G2, G4

How these three records are derived?

From 02-SEP-01 till no end, G3 is not active because it was end dated at 01-SEP-01. But all other groups are active.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the People tab.

Steps

1. Click **Groups** on the main navigation bar.
2. Click **Advanced Search**.
3. Enter as much information as possible for your search criteria. Fields include:
 - Group Name
 - Group Email

- Group Usage
 - Description
4. Use the drop-down list to select a group usage.
 5. Enter the Active From Date or use the **Date Picker** icon to select a date. The date should use the following format: 24-Jul-2001.
 6. Enter the To date or use the **Date Picker** icon to select a date. The date should use the following format: 24-Jul-2001.
 7. Click **Search**.
The Group window opens with a list of groups that match your search criteria.
 8. Click any link to view the Group Details window.

See Also

- [Using the Quick Find Search](#)
- [Initiating an Advanced Search for an Employee](#)

Part II

Notes

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Introduction to Oracle Notes](#)
- [Overview of Using Oracle Notes](#)
- [Managing Notes](#)
- [Viewing Note Information](#)
- [Searching for a Note](#)
- [Data Security for HTML Notes](#)
- [Using Forms-based Notes](#)

Introduction to Oracle Notes

This chapter covers the following topics:

- [Overview of Oracle Notes](#)
- [Oracle Notes Key Features](#)
- [Oracle Notes Integrations](#)
- [Process Flow for Oracle Notes](#)
- [What's New in This Release](#)
- [Terms and Definitions](#)

6.1 Overview of Oracle Notes

A note is a record of descriptive information attached to an object. It is created by an agent, customer care or service representative, or end user, to help retain information such as directions, special instructions, or reminders. The Notes module is used from different applications in the eBusiness Suite to access additional information that relates to a specific transaction. The Notes module can be accessed through both Forms and HTML.

Example

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

Note: Although users can use notes through Forms or HTML, implementation tasks for both modules are still performed in the Forms-based Notes module and can be accessed through the CRM Administrator responsibility.

Once a note is created in the HTML Notes module, it appears in the Notes Summary window with a description of what the note is about. If your note exceeds 2000 characters, you can choose to add an additional 32KB of note text. Alternatively, you may add an attachment to a note, such as a spreadsheet, picture, presentation, or even a hyperlink to a web site.

6.2 Oracle Notes Key Features

The following are key features of the Notes module:

- The Notes module can hold free form text up to 2000 characters.
- There are three statuses of notes: private, public, or publish.
- Note types are available to help you categorize notes.
- You can attach additional text, a file, or a URL to a note.
- Notes are created in the context of a source object.
- Notes can be related to other business objects.

Note: The Notes module is a stand-alone module in HTML only. However, it is commonly accessed from many applications under various responsibilities. For example, Customer Support, Task Manager, Escalation Manager, and Installed Base all use the Notes module.

What is a Note Type?

Note types help categorize notes. They are selected from a drop-down list in HTML or from list of values in Forms. Users can define additional note types and associate those types to specific source objects, which makes the note types visible only to that source. Only note types that are mapped to a source object appear in the note window. Note types that are not mapped to any source object are considered general note types and are shown for all source objects.

Who Uses Notes?

Notes are created and accessed from various applications under various responsibilities. Oracle Customer Support, Task Manager, Escalation Manager, Installed Base, Sales Online, Telesales Marketing Online, and the HTML Calendar all use the Notes module.

What is the Notes Summary Window?

The Notes Summary window is the main entry window for HTML Notes. If you are using the stand-alone HTML Notes module, then all the notes that you create for yourself appear in the Notes Summary window. These stand-alone notes are considered your personal notes and can only be created through the stand-alone HTML Notes module.

If notes are created from other applications for a source object, such as a sales lead, task, or a service request, then all notes for that source ID (such as, Task Manager 10935) and task name (such as, Monthly Conference Call) appear in this window. Notes created in this way are referred to as contextual notes.

Both contextual and stand-alone notes can be related to other business objects allowing you to view the note from various windows. Contextual and stand-alone notes can be marked as private, which means the note can only be viewed by the user that created it.

6.3 Oracle Notes Integrations

Notes is widely used by the following modules across Oracle e-Business Suite:

- Collections use the Notes module to add additional information for late payments or overdue accounts.
- Sales and Telesales applications use the Notes module to enter additional information for an opportunity, a lead, or a task.
- Service applications use the Notes module to enter more information for a service request, defect, or task such as a special customer request or deadline that must be met.
- E-Commerce applications use the Notes module to enter additional information for online service requests, tasks, and campaigns.
- Marketing applications use the Notes module to enter additional information about marketing activities, such as campaigns, events, budgets, or claims.
- Task Manager uses the Notes module to enter more task related information.

- Escalation Manager uses the Notes module to enter additional information for an escalation document.

6.4 Process Flow for Oracle Notes

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

Table 6–1 Notes Process

Steps	Description	Type
Search for a Note	(Optional) Search for a note in the system.	Forms and HTML
Create a Note	(Optional) Create a note.	Forms and HTML
Relate a Note to a Business Object	(Optional) Relate a note to a business object such as a party or employee resource.	Forms and HTML
Add an Attachment to a Note	(Optional) View, create, and add attachments to a note.	Forms and HTML

6.5 What's New in This Release

This release of Oracle Common Application Components has the following new features in Notes subsequent to the 11.5.8 release:

HTML Notes Data Security Rules

The 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, the 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.

6.6 Terms and Definitions

The following table describes Notes terms and definitions.

Table 6–2 Notes Terms and Definitions

Term	Description
Attachment	An attachment is any document associated with one or more application module. 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.
Created By	This is the person who created the note.
Note	This is the note text.

Table 6–2 Notes Terms and Definitions

Term	Description
Note Status	<p>There are three statuses available for notes:</p> <ul style="list-style-type: none">■ Private: Only the creator can view the note. This status is used in HTML Notes and it is reserved for future use in Forms.■ Public: Any user can read or write to the note.■ Publish: The note is publishable over the internet. Everyone can view it. This status is reserved for future use.
Note Text	A large note, such as a customer’s letter or directions. It can capture data up to 32KB.
Note Type	Note types help categorize notes.
Related To	Both contextual and stand-alone notes can be related to other objects allowing you to view the note from various windows.
Source	If a note is created for a source object, like a sales lead or a service request, that object is considered the source object for that Note. Notes created in this way are referred to as contextual notes.

Overview of Using Oracle Notes

This chapter covers the following topics:

- [Accessing the Oracle Notes Interface](#)
- [Summary of Oracle Notes Tasks](#)

7.1 Accessing the Oracle Notes Interface

Since the HTML Notes module is integrated with the HTML Calendar and Task Manager, you can only access HTML Notes through the Calendar tab. Perform the following steps to log in to the Notes module.

Prerequisites

You must be an active resource in the Resource Manager tables to access the Notes module.

Responsibility

CRM Application Foundation User

Navigation

Navigate to any Notes window.

Steps

1. Navigate to the login portal.
2. Enter your user ID.
3. Enter your password and click **Go**.

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

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

7.2 Summary of Oracle Notes Tasks

Use Oracle Notes to perform the following types of tasks:

- Chapter 8, Managing Notes
- Chapter 9, Viewing Note Information
- Chapter 10, Searching for a Note
- Chapter 11, Data Security for HTML Notes
- Chapter 12, Using Forms-based Notes

Managing Notes

This chapter covers the following topics:

- [Creating a Note](#)
- [Adding an Attachment](#)
- [Viewing Existing Attachments](#)
- [Using the Relate To Function](#)

8.1 Creating a Note

A note is a record of descriptive information attached to an object. It is created by an agent, customer care or service representative, or end user, to help retain information such as directions, special instructions, or reminders. Notes created in a specific module are not visible from another module. For example, notes created in the Task Manager are not visible in Service Request.

When accessing Notes from other applications, such as Tasks or Calendar, the source name and source number are passed to Notes and displayed in the Create Note window for your reference.

Please note that HTML Notes module uses the following note statuses:

- **Private:** Only the creator can read and write to it.
- **Public:** The creator and others can read/write to it.
- **Publish:** A note becomes publishable over the Internet. Anyone can view it.

Perform the following steps to create a note.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Create Note window by clicking Create in the Notes Summary.

Steps

1. Select an appropriate note type from the LOV. A note type can be tied to a source object and those types are only visible to that mapped source.
2. (Optional) Change the default note status from the LOV if necessary.
3. Enter up to 2000 characters of text in the description field. If your note exceeds 2000 characters, click **More** to enter an additional 32kb of text.
4. (Optional) Enter reference information including the resource type and corresponding resource name.

The description field automatically populates depending on the information available for the resource you select.

5. Click either **Create**, to create a single note or click **Create and Create Another** to return to the Create Note window in order to create another note.

A confirmation appears that your note was created successfully.

8.2 Adding an Attachment

You can add attachment from the Note Details window.

See the [HTML Calendar](#) documentation for information regarding Adding an Attachment.

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

8.3 Viewing Existing Attachments

See the [HTML Calendar](#) documentation for information regarding Viewing Existing Attachments.

8.4 Using the Relate To Function

You can associate one or more business object to a Note. For example, a note may be created for a Task (the source) but also relate to an employee. A note can be related to two different tasks, but the same note cannot be related to the same task twice. Perform the following steps to relate a business object to a note.

Note:

- The Relate To drop-down list is limited depending on which Oracle module is integrated with Notes.
 - Click the source link to view the source or the name link to view the details of the record.
-
-

Prerequisites

A note must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Relate To window by clicking Relate To in the Note Details window.

Steps

1. Select the note type from the drop-down list. You cannot select a type without selecting a name.
2. Enter a name that corresponds to the type.
3. Click **Go** to search for a name.

The Search and Select window opens.

- a. Enter at least two character in the search field and click **Go**.

A list of names appear in the window.

Viewing Note Information

This chapter covers the following topics:

- [Using the Notes Summary Window](#)
- [Viewing All Notes](#)
- [Viewing Note Details](#)

9.1 Using the Notes Summary Window

Use the Notes Summary to:

- View a list of all your notes
- Create a new note
- Search for a note
- Display note details

When a note is associated with an appointment or task, the note is only visible in the context of that source and does not appear in your Notes Summary or All Notes window. However, you can search for a note associated with a specific source. Perform the following steps to view the Notes Summary window.

Note:

- Use the First, Previous, Next, and Last links to view all of your existing notes.
 - If you are running Notes integrated with another application within Oracle e-Business Suite (Context Sensitive window), there is a filter on the Notes Summary window that lets you search on either the source of the note, or the relate to information.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to any Notes window.

Steps

1. Click **Notes** on the main navigation bar.
The Notes Summary window opens with a list of your notes.
2. Click the note name hyperlink to view the note's details
3. The window provides the following information for each note:
 - The date the note was created
 - The source and source name
 - The creator of the note including the full name, username, and employee ID. Values are captured from the user's login ID.
 - The note type
 - The status of the note
 - The name of the note
 - Whether or not there is additional note text
 - Whether or not there is an attachment accompanying the note

4. Click the icon in the Text column to view additional text added to the note.
5. Click the **paperclip** icon in the Attachments column to add or update an attachment. If there is an attachment provided with the note, the paperclip icon has a small paper icon associated with it. If there is no attachment, only the paperclip icon appears.

9.2 Viewing All Notes

Use the All Notes window to view all notes that are in the Notes Summary window arranged in a non-table format.

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

Perform the following steps to view all notes.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Notes Summary window by clicking Notes on the Main Navigation bar.

Steps

1. In the Notes Summary window, click **All Notes**.

The All Notes window opens with a list of your notes. If no notes are found, an error message appears. The window provides the following information for each note:

- The date and time the note was created
- The username of the user who created the note
- The source and source name
- The note type

- The note details icon
 - The note text
2. Click the **Note** icon to open the Note Details window. Details of the note appear along with information about the creator, and the time and date the note was created and updated.
 3. Click Return to Summary to view the Notes Summary window.

9.3 Viewing Note Details

Use the Note Details window to perform the following tasks:

- Update note type and status: You can modify the note type and status information for an existing note, but you cannot update the actual note information. The actual note is protected from any update.
- View a large note: You can view the large note that is attached to an existing note by clicking the More button.
- Create attachments: Click the Attachment button to add or update attachments to an existing note.
- Update “relate to” information: You can create, update, and delete “relate to” information by clicking the Relate To button to access the Relate To window. See the [Using the Relate To Function](#) for more information.

Note: The Source provides information on who created the note and the name provides the name of the note. If the note was created from a source other than the Notes stand-alone module, you can click the source or name to drill down on the details of the record.

Perform the following steps to view the details of a specific note.

Prerequisites

A note must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Note Summary window.

Steps

1. Click the note name to view more information about the note in the Note Details window
2. Modify the type, status, attachment, or relate to information as necessary and click **Update**.
3. Click **Restore** to retrieve the original values before your last update.

Searching for a Note

This chapter covers the following topics:

- [Using the Quick Find Search](#)
- [Searching for a Note](#)

10.1 Using the Quick Find Search

Use the Quick Find search to find your appointments, tasks, notes, employees, and groups. Perform the following steps to execute a search.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to any Notes window.

Steps

1. Using the Quick Find drop-down list, select your search criteria:
 - Appointments
 - Task
 - Notes
 - Employees

- Groups
2. Enter a keyword or letter (at least three characters) for the search and click **Go**.
The Search Results window opens.
 3. Click any item to display the details.

10.2 Searching for a Note

Use the Notes Search window to search all notes based on multiple search and sorting criteria.

Search Criteria

You can perform a search based on the search criteria you entered. These criteria include key word, source, relate to, note type, created by, and date range information.

After entering search criteria, you can perform a search without further specifying the sorting criteria if you want the search results based on the default settings. This means that notes are sorted by date with an ascending order (starting with the earliest date) and are displayed 15 rows in one page. The search results are shown in the Notes Summary window.

Sorting Criteria for Search Results

Before performing a search, you can also manage your sorting results by entering sorting criteria (date, note type, status, and source). You can decide to sort by an ascending or a descending order for the selected sorting criteria.

After entering the appropriate criteria into the fields and clicking **Search**, the results are displayed in the Notes Summary window.

For example, you can first sort by note type with an ascending order, then by date with an ascending order, and finally by status with a descending order. In addition, you can also enter the number of rows visible in one page after performing a search.

Please note that you can also use the Quick Find search by selecting Notes from the Quick Find drop-down list and entering search criteria. After entering key words or using the wildcard “%”, you can click the notes that you want to view from the search results to see the notes details.

Perform the following steps to find an existing note.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Notes Search window by clicking Search in the Notes Summary.

Steps

1. In the Notes Search window, enter a keyword for the search.
The keyword search is to enter a partial or full word to search the text entered in the regular notes only, not the large notes.
2. Select a source to search on. You must choose a source in order to select the corresponding record name or select All (Sources).
The created by field defaults to the logged in user's ID.
3. Select relate to information for the note. You must select a relate to in order to select the corresponding record name. Depending on what you enter, the created by field populates automatically.
4. Select a note type.
5. Enter a date range. Select any of the following option buttons to specify the date:
 - None or Today drop-down list
 - Last 30 days (default): Enter the last number of days that you want to search.
 - From To: Use the date picker icon to enter desired date range for your search.
6. Select your sorting preferences by entering sorting criteria (date, note type, status, and source).
7. Select how many rows you want to display and click **Search**.
The Notes Summary window opens with a list of your notes.

Data Security for HTML Notes

This chapter covers the following topics:

- [Overview](#)
- [HTML Notes Security Rules](#)

11.1 Overview

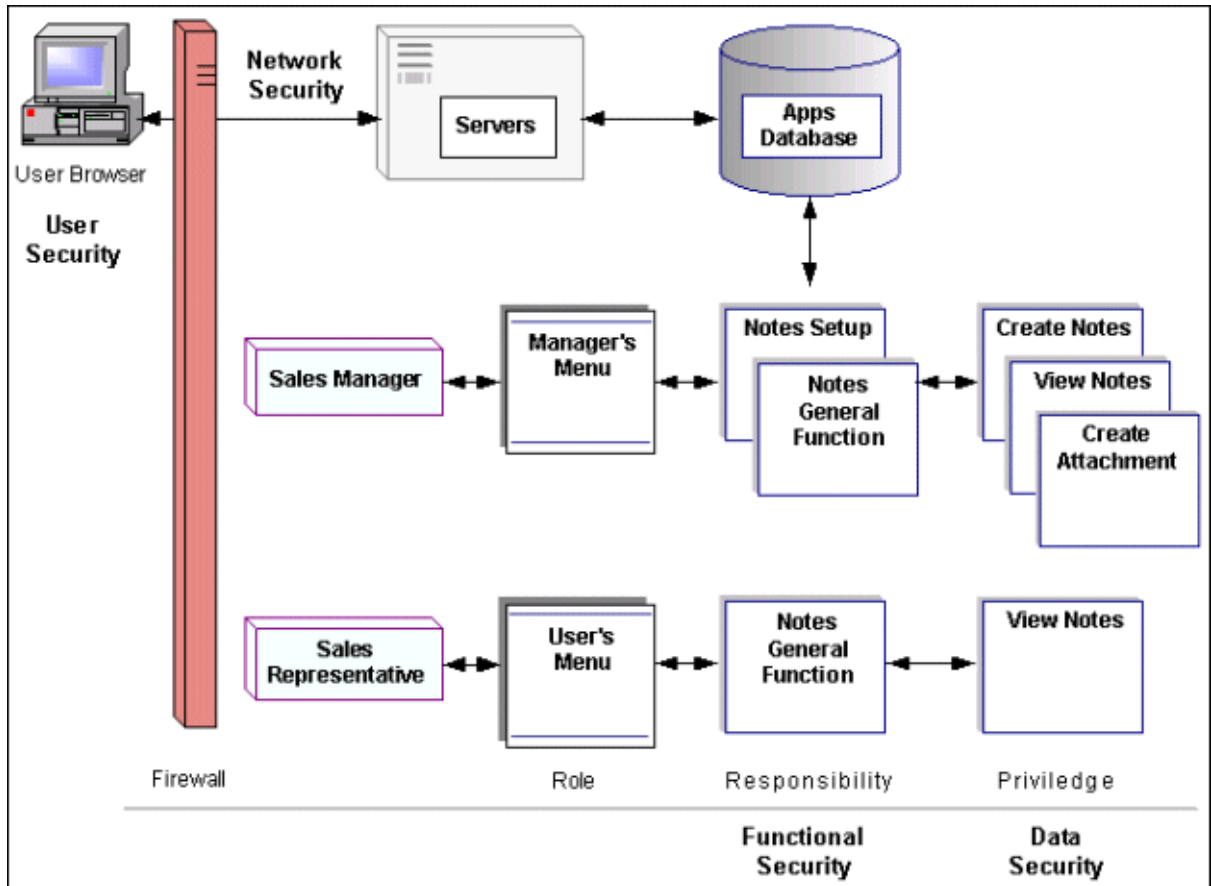
When a note is created or attached to a business object, it may contain confidential data that is only meant to be viewed by specific users. Oracle HTML Notes module provides a flexible system of access privileges that restricts the ability to view note data to the appropriate users. This system is based on the Application Object Library (AOL) data security model.

AOL Security Overview Used in Oracle E-Business Suite

There are four different aspects of security access 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.

Figure 11-1 AOL Security Model Used in Oracle E-Business Suite



With the finest security level enforced in HTML Notes, data entered in the system can be protected through the security authorizations for access and modification of specific data records.

Note: Even you define the data security rules in the HTML Notes, these rules will not be enforced in the Forms-based Notes module.

Detailed information on AOL security framework, refer to *Oracle Applications System Administrator's Guide*.

11.2 HTML Notes Security Rules

Based on the AOL data security model, who can access which data is dependent on the access privileges granted to the user.

In general, the HTML Notes module provides the following security access:

- 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
- Ability to restrict "note type" list of values

Ability to view a note

Your system administrator can restrict the note that you can access by granting you appropriate access privileges. These access privileges can be restricted to a specific data entered for certain notes.

For example, you can view all notes with status not "private". For a private note, only the owner of that private note can view the note. Perhaps only sales managers can view all notes with note type "offer".

Ability to create a note

You can create new notes only if you are granted with the note creation privilege. Otherwise, the Create button will not be visible in the Notes Summary window.

This functionality includes not only creating a regular note, and a large note (detailed note), but also creating an attachment for a note.

Ability to update a regular note

You can update regular notes information only if you are granted with the relevant note update privilege. Otherwise, the main note's text will not be enabled for updates.

Ability to update a large note

You can update a large note (or a detailed note) attached to a regular note only if you are granted with the relevant note update privilege. Otherwise, the large note will not be enabled for updates.

Ability to update a note's secondary information

Secondary note attributes are all note information with the exception of the regular notes and large notes information. They include note type, status, relation (relate to) and attachment information. You can only update secondary notes information if you have the secondary note update privilege.

Ability to restrict "note type" list of values

When creating a new note, you might be able to see only part of the note types from the list of values if your system administrator restricts you to certain note types. For example, call center agents can see "interaction" note type, not knowledge base note type, for interaction or activity related notes if they are restricted to access certain note types.

Please note that even if you create notes of a restricted note type, you might not be able to view it after they are saved unless you are granted with appropriate access privileges as mentioned earlier. For example, a sales representative creates a note with note type "offer", but only a sales manager can view this type of notes if a specific privilege has been granted to sales managers only.

By restricting note type access, you will be prevented from creating a note of a type that you will not be able to query or view later.

Note: Restrict note type list of values should be done on top of the existing note type mapping.

How to customize HTML Notes security rules, see the Customizing HTML Notes Security chapter in the *Oracle Common Application Components Implementation Guide*.

Using Forms-based Notes

This chapter covers the following topics:

- [Creating Notes](#)
- [Finding Notes](#)

12.1 Creating Notes

A note is a record of descriptive information attached to an object. It is created by an agent, customer care or service representative, or end user, to help retain information such as directions, special instructions, or reminders. Notes created in a specific application within Oracle e-Business Suite are not visible from another application. For example, Notes created in the Task Manager are not visible in Service Request.

Note: View the note through the Notes tab and any additional note text through the Summary tab. Clicking **Latest First** in the Summary tab organizes the note history so that the most recent note appears first.

After creating notes, you can 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 called. 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 to.

Perform the following steps to create a note.

Prerequisites

None

Responsibility

End User

Navigation

Navigate to **Tools > Notes** in any application integrated with Notes.

Steps

1. Click **New** in the Notes window.

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

2. Enter up to 2000 characters of text in the Notes field. If your note exceeds 2000 characters, click **More** to enter an additional 32kb of text in the detailed Note window.
3. Select note type and status from the list of values (LOV) for each field.
4. Select reference information from the Relate To LOV.
5. Enter a value for the reference information.

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

6. Click **Save**.

See Also

[Finding Notes](#)

12.2 Finding Notes

Find a note by performing a search for the source number, owner, date, or note type.

Perform the following steps to find an existing note.

Prerequisites

None

Responsibility

Responsibilities used in Support Applications

Navigation

Navigate to **Tools > Notes** in any application integrated with Notes.

Steps

1. On the application toolbar, click **Find**.
The Find Notes window opens.
2. Select the source and number from the list of values (LOV) for each field and click **Search**.
The note information appears in the main note window.
3. Enter the owner, date, or note type and click **Search**.
The application populates the Notes tab in the Notes window with the possible matches.
4. Click to select your note and scroll right for additional information.
5. Further refine your note search by entering Related To information in the Find Notes window. Selecting a match option also helps you refine your search.

See Also

[Creating Notes](#)

Part III

Assignment Manager

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Introduction to Oracle Assignment Manager](#)
- [Overview of Using Oracle Assignment Manager](#)
- [Assigning Options](#)
- [Viewing Resource Information in Assignment Manager](#)

Introduction to Oracle Assignment Manager

This chapter provides an overview of Assignment Manager in the following topics:

- [Overview of Oracle Assignment Manager](#)
- [Oracle Assignment Manager Integrations](#)
- [Ownership and Resources](#)
- [The Gantt Chart](#)
- [Assigning a Process](#)
- [Selecting Assignment Criteria](#)
- [Process Flow for Oracle Assignment Manager](#)
- [What's New in This Release](#)
- [Terms and Definitions](#)

13.1 Overview of Oracle Assignment Manager

Assignment Manager is a tool that is integrated with other applications for selecting or designating qualified resources for a document or a task. It supports all resource categories defined in the Resource Manager module and cannot be used as a stand alone application. You can use Assignment Manager to assign resources or ownership to a task or a document.

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.

13.1.1 What is an Assignment?

An assignment is a task or responsibility that can be delegated to an individual based on skill or availability.

Example

A support manager is required to fix all company hardware problems. The support manager assigns all of the desktop computer problems to a desktop technician and requires that the repairs be completed by the end of the week. In this case, the support manager is the owner of the assignment and if the desktop technician accepts the assignment, then that person becomes the assignee. The assignment criteria is based on the desktop technicians level of expertise and availability.

13.1.2 Designate Resources

When logging a service request, you can use Assignment Manager to determine the following types of available resources:

- Resources that are responsible for the company's geographical location
- Resources that are available for a specific time frame
- Resources with the lowest labor rate
- Resources preferred by the company

13.1.3 Assign Ownership

Assignment Manager can also assign ownership to a task or a document by performing the following:

- Assign responsibility for documents and tasks
- Assess the availability of qualified resources needed to be an owner for a task or document

The assignment process uses criteria based on preferred resources, availability, and territories. An optional module, Oracle Scheduler provides additional features to optimize scheduling resources.

13.2 Oracle Assignment Manager Integrations

Assignment Manager cannot operate as a stand alone application and must be integrated with another application.

13.2.1 Integration with Oracle CRM Applications

Assignment Manager can be integrated with the following Oracle CRM applications:

- **Contracts** provides preferred engineers.
- **Installed Base** determines preferred engineers.
- **TeleSales** uses Assignment Manager to assign appropriate resources to a lead.
- **Teleservice** (formerly known as Customer Support) uses Assignment Manager to help assign an owner to a service request.
- **Field Service** uses Assignment Manager in the Dispatch Center (previously the Control Tower) to assign an owner to a field service request.

13.2.2 Integration with Oracle Common Application Components

The following Oracle Common Application Components integrate with Assignment Manager:

- **Territory Manager** provides qualified resources identified in a territory.
- **Escalation Manager** uses Assignment Manager to assign an owner to an escalation document.
- **Forms-based Calendar** offers resource work shift information.
- **Task Manager** (Forms-based) determines task duration. Tasks also uses Assignment Manager to help assign resources (an owner and an assignee) to a task.

Note: When assigning resources to a HTML task, you can manually assign resources, or use backend processes to call Assignment Manager and then update the resource assignment table for a task assignment.

Oracle Quality Online, Sales Online and iSupport applications can either manually select resources or use backend processes to call Assignment Manager for resource selection.

13.3 Ownership and Resources

Assignment Manager can assign ownership and resources to a specific task or document based on selection criteria including customer preferred resources, territories, and resource availability. The following section discusses the concept of ownership and resource assignment options.

- [Assigning Ownership](#)
 - [Assisted Assignment Option](#)
 - [Unassisted Assignment Option](#)
- [Assigning Resources](#)
 - [Assisted Assignment Option](#)
 - [Unassisted Assignment Option](#)
 - [Intelligent Assignment Option](#)
 - [Window to Promise Assignment Option](#)

13.3.1 Assigning Ownership

You must assign an owner when you create a document or task to ensure that some type of action is taken.

- A **document owner** can be a service manager, expeditor, marketing person, service support, or a salesperson.
- A **task owner** can be a planner, dispatcher, or service representative. An owner is defined as a resource within Assignment Manager.

In order for a task or service request to be fulfilled, that task or service request must have a person (owner) responsible for subsequent actions. The actions are performed either by that person or by someone else (assignee) for task completion. The assignee is selected based on ability or availability.

Note: Task assignments are time sensitive and dependent on resource availability. Therefore, the Intelligent and Window to Promise options are limited to selecting assignees. They are not used for assigning ownership.

The following table describes the two options used for assigning ownership.

Table 13–1 Assigning Ownership

Option	Description
Assisted Assignment Option	Use this option to find a list of qualified resources based on a predefined set of criteria. When no resource can be found based upon the selection criteria, you must adjust your criteria and perform a search again.
Unassisted Assignment Option	Use this option to assign a task or document without specifying the criteria, or to overrule the criteria set.

13.3.2 Assigning Resources

Assignment Manager can designate qualified resources for a task or a document based on certain criteria, such as availability and resource location.

The following table describes the four options for assigning resources.

Table 13–2 Assigning Resources

Option	Description
Assisted Assignment Option	Use this option to find a list of qualified resources based on a predefined set of criteria. The Gantt chart displays tasks and task statuses. When no qualified resource is shown, you must adjust your criteria and search again. When no resource can be found based upon the selection criteria, you must adjust your criteria and perform a search again.
Unassisted Assignment Option	Use this option to assign a document or task without considering search criteria. For example, to assign a group to a task, either specify the exact group name or partial name, if known, or search for all group resources and then select them based on resource availability for the task.
Intelligent Assignment Option	This is an option specific to field service that is only available when Oracle Scheduler is installed. This option provides relative cost and travel time information, which is particularly useful to Field Service. The Intelligent option has been disabled as a menu choice in Service Request and in Escalations. It is used only in the Field Service Dispatch Center.

Table 13–2 Assigning Resources

Option	Description
Window to Promise Assignment Option	This is an option specific to field service that is only available when Oracle Scheduler is installed. The Window to Promise displays time intervals at which a resource (service representative) can visit the customer to perform the task. The Window to Promise option has been disabled as a menu choice in Service Request and in Escalations. It is used only in the Field Service Dispatch Center.

13.3.3 Assisted Assignment Option

The Assisted Assignment Option finds a list of active resources in Assignment Manager based on a predefined set of criteria Instead of selecting resources based on the user’s choices. When Assignment Manager is invoked, the Assisted option is the default assigning mode.

Note: In the Unassisted and Assisted assignment options, Assignment Manager does not return any end dated resources. All resources populated in the Gantt chart are active resources.

For task assignments, save your task first before launching Assignment Manager. Otherwise, the task start and end date information will not populate automatically in the document details region.

Use this option if you want Assignment Manager to assist you in selecting qualified resources to be the owner of a document or to fulfill a task based on certain criteria. This selection criteria can help you assign qualified resources to a task or a document.

Example

A company that is having computer problems requests help from its support vendor. A representative for the support vendor who must send resources to the company can use the Assisted option in Assignment Manager to help select qualified resources based on the following criteria:

- **Preferred Resources** retrieves a customer’s preferred resources (engineers) defined in Oracle Contracts or Installed Base.
- **Territories** identify transaction qualifiers, such as Customer Name that are used for territory selection. When Assisted option is used for the first time, all

transaction qualifiers are automatically selected. After the search is performed, all resources in the winning territories with transaction qualifier "Customer Name" are displayed in the Resource region.

- **Resource Availability** searches for all available resources based on a task or a document duration.

After performing a search, the customer support representative can view shift schedules and assigned tasks in the Gantt chart.

See Also

- [Unassisted Assignment Option](#)
- [Intelligent Assignment Option](#)
- [Window to Promise Assignment Option](#)
- [Viewing and Assigning Resources in the Gantt Chart](#)
- [Viewing Resource Web Availability in the Gantt Chart](#)
- [Viewing Support Site Name Information in the Gantt Chart](#)
- [Viewing a Resource's Product Skills Rating](#)

13.3.4 Unassisted Assignment Option

The Unassisted Assignment option assigns a document without taking search criteria into account. If you want to assign a group resource to a task, then either specify the group name (if you know it) or search for all group resources, and then make your choice based on resource availability for the task.

Note: When using the Unassisted and Assisted assignment options, Assignment Manager does not return any end dated resources. All resources populated in the Gantt chart are active resources.

Example

After receiving a hardware repair request from a customer, a service company's support representative logs a service request and then creates a task for that request. As part of this process, the support representative enters the customer's request location and also enters the current date as the planned start date and adds five business days to establish the end date. Before assigning the appropriate resource to

the service request, the support representative uses Assignment Manager to view that person's availability. Using the Unassisted Assignment option, the support representative enters the following information to limit resource selection:

Resource Partial Name enables the support representative to enter a partial name for the resource.

Resource Type limits resource selection to a specific resource type. For example, selecting group resource in the Resource Type field retrieves all of the group resources information.

When the Unassisted Assignment option is selected, predefined selection criteria is not available. After searching for resources, the support representative can view shift schedules and assigned tasks in the Gantt chart.

See Also

- [Assisted Assignment Option](#)
- [Window to Promise Assignment Option](#)
- [Viewing and Assigning Resources in the Gantt Chart](#)

13.3.5 Intelligent Assignment Option

The Intelligent assignment option displays resources with costs and travel time information and is used only in the Field Service Dispatch Center. When Oracle Scheduler is installed, the Intelligent assignment option enables task assignment based on predefined constraints for qualified service representatives. These cost related constraints including, travel time, travel distance, overtime, and delays, are set up according to business requirements.

Because this option creates sequenced tasks for each qualified resource, the travel time is indicated in the beginning of each task and between tasks. You can optimize this schedule later or reassign a task before dispatching the schedule to the service representative.

Note: Oracle Scheduler uses the Time Distance Server to determine the cost for a qualified resource. It is based on the field service representative's starting and ending locations for a task (or between two tasks) and the amount of time that it takes to travel. Therefore, each task needs location information that is derived from the address using street, city, country, and zip code.

The Intelligent option has been disabled as a menu choice in Service Request and in Escalations. This option is used only in the Field Service Dispatch Center. Refer to Oracle Field Service documentation for detailed information.

Once the Intelligent option is selected, you can select any combination of the same three search criteria that are used in the Assisted option.

See Also

- [Assisted Assignment Option](#)
- [Assisted Assignment Option](#)
- [Unassisted Assignment Option](#)
- [Window to Promise Assignment Option](#)
- [Viewing and Assigning Resources in the Gantt Chart](#)

13.3.6 Window to Promise Assignment Option

The Window to Promise option displays the time slots during which a service representative can visit a customer to perform a task, and can only be used in the Field Service Dispatch Center. The time slots are reserved for customers and are defined in the Oracle Scheduler setup window. A single time slot can be reserved for multiple customers.

The time window is also calculated through the Time Distance Server. It is based on the field service representative's starting and ending locations for a task (or between two tasks) and the amount of time that it takes to travel between the two. Therefore, each task needs location information that is derived from the address.

This option provides the ability to select a qualified resource based on a predefined resource selection criteria. It also accounts for the customer's preferred time frame with possible costs identified for task completion.

Example

A company experiencing network problem contacts its service vendor and requests that it dispatch a field technician to fix the problem. The company further requests that the work be performed between 10:00 am to 12:00 p.m. on Wednesday or 8:00 a.m. to 12:00 p.m. on Friday. The service vendor estimates that the repair work will take four hours to complete.

The service vendor's dispatcher logs a service request and selects the Window to Promise option in Assignment Manager. This helps the dispatcher to identify a resource who is available from 8:00 a.m. to 12:00 p.m. on Friday, May 4, 2001 with a reasonable cost for the assignment. After the Window to Promise option is selected, dispatcher selects the following options:

Preferred Resources removes the selection for all the preferred resources if no preferred engineers are identified in Contracts or Installed Base.

Territories selects the Territories check box to use territories to assist in the resource assignment.

Resource Availability checks this to see the available resource. This is not available if neither Preferred Resources nor Territories are used.

After performing a search, the dispatcher can view shift schedules with relative cost information displayed in a window format, instead of in a Gantt chart.

Note: The Window to Promise option has been disabled as a menu choice in Service Request and in Escalations. This option is used only in the Field Service Dispatch Center. Refer to Oracle Field Service documentation for detailed information.

See Also

- [Assisted Assignment Option](#)
- [Unassisted Assignment Option](#)
- [Intelligent Assignment Option](#)

13.4 The Gantt Chart

The Gantt chart provides a quick graphical overview of the scheduled tasks based on a specific period of time.

Note: The Thin Client Framework (TCF) server must be set up correctly and running in order for the Gantt chart to work properly.

After a search, you can view the following information for a specific resource in the Gantt chart:

- Shift Schedules (yellow background)
- First Available Time (green bar)
- Assigned Tasks (blue bar)
- Escalated Tasks (red bar)

Shift schedules are defined in the Forms-based Calendar module.

You can drag the scroll bar to move across the Gantt if the shift or current time line is not synchronized properly.

13.4.1 Shift Displays in the Gantt Chart

How to determine the resource's available time?

The default for the First Available slot for a resource depends on the following:

- The time the shift starts
- The current time

Assignment Manager takes into consideration what the current time is and when the resource's shift actually starts. The end time for the first available slot equals start time plus the duration. If no duration is specified, the default assumed is one hour.

Examples

If the resource's shift runs from 9:00 a.m. to 6:00 p.m., and if the current time is 11:47 a.m., then if no start or end date-time is specified for the search, the Assignment Manager defaults to 11:47 a.m. as the first available slot for a resource.

If the resource's shift runs from 9:00 a.m. to 6:00 p.m., and if the current time is 8:47 a.m., then if no start or end date-time is specified for the search, the Assignment Manager defaults to 9:00 a.m. as the first available slot for a resource.

How does Assignment Manager determine duration and planned date over duration when both are defined in task?

While assigning available time for a selected resource, Assignment Manager also checks the planned start and end dates for the required task time frame to locate the work shifts if identified, as well as checks the planned effort and duration effort to determine the required work hours (or days) for a task assignment.

The following table describes the effort information that can be entered while defining a task.

Table 13–3 Effort Information

Dates for a Task	Description
Planned	The effort required to complete a task. For example, a task requires 10 hours work and is assigned to Mary and John. Each needs to contribute five hours to complete this assignment. The planned effort to complete this task is 10 hours.
Duration	The actual time for task completion. For example: <ul style="list-style-type: none"> ■ If Mary works from 10:00 a.m. to 2:00 p.m., and John continues from 2:00 p.m. to 7:00 p.m., then the duration of this task is nine hours (10:00 a.m. - 7:00p.m.) ■ If John starts at 10:00 a.m., instead of 2:00 p.m., and finishes at 3:00 p.m., then the duration is five hours (10:00 a.m. - 3:00 p.m.)
Actual	The actual effort for a task. For example, the actual effort for Mary to complete her work is four hours (10:00 a.m. - 2:00 p.m.) and for John is five hours (10:00 a.m. - 3:00 p.m.)

The following table describes the date information which can be entered while defining a task.

Table 13–4 Date Information

Dates for a Task	Description
Planned	The planning start and end dates are required for a task. For example, a hardware repair task is specifically required to occur from February 12 to February 14, 2002.
Scheduled	The scheduled start and end dates are shown here after the resources are assigned through Assignment Manager, such as February 12 at 8:00 a.m. to February 12 at 11:30 a.m., 2002.

Table 13–4 Date Information

Dates for a Task	Description
Actual	The actual start and end dates for the task.

The planned effort and duration effort do not always require the same work hours or days. For example, if a task is assigned to one resource, from start to finish, then the planned and duration efforts should be the same. However, if it is assigned to more than one resources, then the planned effort (10 hours work to complete the task) and duration effort (the actual time for a task completion, such as five hours work) might not be the same.

Assignment Manager uses the following rules to determine the effort required for a task assignment:

- If the planned effort is provided while creating a task, but there is no duration effort, then display the planned effort in Assignment Manager.
- If both planned effort and duration efforts are provided while creating a task, then display the planned effort in Assignment Manager.
- If the planned effort is **not** provided, but duration is provided while creating a task, then display the duration effort in Assignment Manager.

In summary, planned effort always takes precedence and the Actual Effort is of no significance while using Assignment Manager for a task assignment.

13.5 Assigning a Process

The process for selecting a qualified resource is based upon selection criteria and customer selections. To make these criteria effective, some requirements need to be met. The process for assigning documents and availability, the following is further explained in the following sections:

- [Assignment Manager Dependencies](#)
- [Assignment Manager Selection Criteria](#)

13.5.1 Assignment Manager Dependencies

The following table describes Assignment Manager's required dependencies.

Table 13–5 Dependencies

Dependency	Description
Preferred Resource Information	A preferred resource is a single person or a resource group that is defined in Oracle Contracts or is recommended from the Installed Base in Oracle Service.
Territory Definition	Territories are defined in Territory Manager. A territory has resources or resource groups assigned to it. For more information, see the module Territory Manager.
Task Duration Information	Task duration is essential for checking the availability of the resource and for designating a resource as unavailable in the resources calendar after a task has been assigned.
Resource's Availability Information	Availability of the resource is provided by the Forms-based Calendar component in which availability is defined. For more information, see the Forms-based Calendar documentation.

13.5.2 Assignment Manager Selection Criteria

The following table describes Assignment Manager's selection criteria.

Table 13–6 Assigning Resource Availability

Criteria	Description
Preferred Resources	The first criterion the Assignment Manager considers in the assignment process.
Territories	Territories are used to retrieve all the qualified resources for the assignment from the winning territories.
Resource Availability	The availability of the resource is considered after a preferred or qualified resource, based upon territories, is selected.

13.5.2.1 Preferred Resources

Preferred resources must first be set up in Oracle Service Installed Base and Oracle Contracts. A customer's preferred resources can be employees, groups, or team resources set up in Oracle Contracts or recommended from the Installed Base in

Oracle Service. Once the preferred engineers are identified in either application, you can retrieve recommended resources based on specific customer preferences.

Examples:

1. A company lists two preferred engineers in the service contract with its support vendor. A service representative can use the Assisted assignment option, by selecting the Contracts check box in Assignment Manager, to display both engineers in the Resource region.
2. A company specifies an Installed Base preferred engineer. The support vendor's service representative sees the specified engineer's name in the Resource region if the Installed Base check box is checked.

For a service request assignment, when Contracts, Installed Base, and Territories check boxes are all selected in the Assignment Manager window, the Assignment Manager engine checks Contracts preferred resources first. If a Contracts preferred resource is found, Assignment Manager displays this resource in the Gantt chart and stop the process. If no resource is found, then Installed Base preferred resources will then be checked. If a preferred resource is found, then return the resource and stop the process. If not, then Assignment Manager checks Territories for qualified resources.

Default resource selection order is:

1. Contracts
2. Installed Base
3. Territories

You can change the default resource selection order by using the profile option "Resource Search Order" if necessary.

Note: The Assignment Manager engine uses the "Activate Contracts Preferred Engineers" and "Activate Installed Base Preferred Engineers" profile options to determine whether or not the preferred engineers are chosen automatically.

13.5.2.2 Territories

Territories defined in Territory Manager are used to provide resources for a task or document. This assistance is done through the transaction qualifiers and qualified resources identified in a territory. Transaction qualifiers aid (filter) in a territory win over competitions between territories. The qualified resources in the winning

territories can then be assigned to a task or document. See the section on Territory Manager for additional details.

When setting up resources in a territory, if resources are end dated in Resource Manager, these end dated resources are not displayed in Assignment Manager when using Assisted and Unassisted assignment options. See the section on Resource Manager for additional details.

Example

Two engineers are the qualified resources in the West Coast Territory. When a support manager tries to assign an open service request to the proper resources located in the West Coast, the support manager uses territories to assist Assignment Manager in the selection. If the West Coast Territory happens to be the winning territory, then the two engineers are listed in the Resource region in the Assignment Manager window. The support manager can assign either one to the service request based on their availability and customer needs.

13.5.2.3 Resource Availability

Assignment Manager uses the Forms-based Calendar to check the availability of a resource. When a task is assigned to a resource, that resource becomes unavailable for the period of time designated by the task.

After a preferred or qualified resource is identified, the next important criteria to consider is the availability of that qualified resource. Resource availability information is provided by the Common Application Components Forms-based Calendar module in which the shift schedule is defined. Resource availability for a specific time frame is determined by task planned start and end date. After a task or document has been assigned to a resource, this designated resource becomes unavailable and then will be reflected in the Assignment Manager window.

Note: The resource availability discussed here has a specific time frame required by a task or document (task planned start and end date). However, the resource Web availability always indicates current time.

Example

A support representative receives a call regarding a task that can be completed in up to four hours and that must be completed in the following week. The support representative can select territory as the criteria and can also check resource

availability in the Assignment Manager window for the following week's time frame. If there are two technicians capable of completing the work but only one is available in the required time frame, then the available technician is selected.

The support representative can update the available technician's start and end date if necessary and can specify the four hour work completion time.

13.6 Selecting Assignment Criteria

The following table lists the assignment criteria that can be selected in the Assignment Manager Assisted window:

Table 13-7 Assignment Criteria

Preferred Resources	Territories	Resource Availability	Selection Results in:
Yes	No	No	A search for the preferred resource, availability is not taken into account.
No	Yes	No	A search for a qualified resource in the selected territories, availability is not taken into account.
No	No	No	A search for an available preferred resource or territories is not taken into account.
Yes	Yes	No	A search for the preferred resource, availability is not taken into account. When no preferred resource is available, a search for a qualified resource in the selected territories is done, availability is not taken into account.
No	No	Yes	The search looks for all resources in the system taking availability into account.
No	Yes	Yes	A search for a qualified resource in the territories selected and availability is taken into account.
Yes	Yes	Yes	A search for the preferred resource or territory, availability is taken into account. If no preferred resource is available, a search for a qualified resource in the selected territories is done, availability is taken into account.

13.7 Process Flow for Oracle Assignment Manager

The following table describes the order and process of using Assignment Manager.

Table 13–8 Assignment Manager User Process

Step	Description	Required	Performed By
Assisted Assignment Option	The Assisted assignment option is used to assign a resource to a task or a document based on predefined criteria.	Yes	All Users
Unassisted Assignment Option	The Unassisted assignment option is used to assign a resource to a document or task without taking predefined criteria into account.	Yes	All Users
Intelligent Assignment Option	(Optional) The Intelligent assignment option is used to assign the resource, with the lower cost and travel information, to a service request.	No	All Users
Window to Promise Assignment Option	(Optional) The Window to Promise assignment option is used to assign a resource to a specific time slot to fulfill a task created within a service request.	No	All Users

13.8 What's New In This Release

The following new features have been added to Assignment Manager subsequent to the 11.5.8 release.

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 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. 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.

13.9 Terms and Definitions

The following table describes the Assignment Manager terms and definitions.

Table 13–9 Assignment Manager Terms and Definitions

Term	Description
Assignee	An assignee is the designated person who commits to fulfill a specific task or an assignment.
AM module	The Assignment Manager is a tool that helps you assign resources to a task or a document.
Assisted Assignment Option	The Assisted assignment option is used to assign a resource to a task or a document based on predefined criteria.
Unassisted Assignment Option	The Unassisted assignment option is used to assign a resource to a document or task of your choice without taking predefined criteria into account.
Intelligent Assignment Option	The Intelligent assignment option is used to assign the resource with the lowest cost to a task created within a service request.
Window to Promise Assignment Option	The Window to Promise assignment option is used to assign a resource to a specific time slot to fulfill a task created within a service request.
Dispatch Center	The Dispatch Center is a window in Field Service where you can view resource availability or assign resources to a task. It was originally called the Control Tower.
Gantt Chart	The Gantt chart provides a graphical overview of the scheduled tasks for resources.

Table 13–9 Assignment Manager Terms and Definitions

Term	Description
Owner	An owner is a person (resource) who oversees a task or a document.
Resource Web Availability	Resource web availability is defined as a resource who has the immediate ability to work on a service request that is created online.

Overview of Using Oracle Assignment Manager

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

This chapter covers the following topics:

- [Accessing the Oracle Assignment Manager Interface](#)
- [Summary of Oracle Assignment Manager Tasks](#)

14.1 Accessing the Oracle Assignment Manager Interface

The Assignment Manager module is embedded within Oracle Common Application Components or other CRM products. It is not used as a stand-alone module and is only accessible through other CRM applications, such as Customer Support and Field Service, and Foundation modules, such as Task and Escalation Managers.

For example, you can access Assignment Manager through a stand-alone task in the Forms-based Task Manager or through a task associated with a service request in Teleservice and Field Service applications.

If accessing from Task Manager, first click **More** to bring up the Task Details window. Then click the Assignment Manager icon in the Resources tab.

Note: Save your task first before launching the Assignment Manager. Otherwise, the task's start and end date information will not automatically populate in the Document Details region.

14.2 Summary of Oracle Assignment Manager Tasks

Use Oracle Assignment Manager to perform the following types of tasks:

- [Chapter 15, Assigning Options](#)
- [Chapter 16, Viewing Resource Information in Assignment Manager](#)

Assignment Options

This chapter discusses the assignment options available in Assignment Manager. When locating resources in Assignment Manager, you can use different options to determine which resources are available according to different criteria.

15.1 Overview

Assignment manager contains the following assignment options:

- [Assisted Assignment Option](#)
- [Unassisted Assignment Option](#)
- [Intelligent Assignment Option](#)
- [Window To Promise Assignment Option](#)

15.2 Assisted Assignment Option

Perform the following steps to use the Assisted option to assign a resource based upon the selection criteria. The Gantt chart displays those tasks that have already been assigned in blue and plan options in green. Move your cursor over a task to view details.

Note: In the Unassisted and Assisted assignment options, Assignment Manager does not return any end dated resources. All resources populated in the Gantt chart are active resources.

Prerequisites

- Oracle Contracts must be installed only if using Contracts preferred resources.

- Oracle Installed Base must be installed only if using Installed Base preferred resources.
- Territory Manager must be installed and set up correctly if using territory assisted option.

Responsibility

Since Assignment Manager is not a stand-alone module, the responsibility will vary depending on the calling application or module.

Navigation

Navigate to the Assignment Manager window.

Steps

1. Select the **Assisted** option from the Selection Criteria.
2. Select appropriate selection criteria for your search.
3. Click **Search**.

The Gantt chart for the qualified resource appears.

4. If the Gantt chart is empty, then adjust the selection criteria and click **Search** again.
5. Double-click on the resource who you want to use for this assignment.

The selection appears in the Resources, Resource Type, Start Time, and End Time fields automatically.

If the selected resource has support site identified in Resource Manager, the support site information also displays in the Support Site Name field.

6. Edit the preferred Start Time and End Time if needed.
7. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without saving your changes.

See Also

- [Ownership and Resources](#)
- [Unassisted Assignment Option](#)
- [Intelligent Assignment Option](#)
- [Window To Promise Assignment Option](#)

- [Viewing and Assigning Resources in the Gantt Chart](#)
- [Viewing Resource Web Availability in the Gantt Chart](#)
- [Viewing Support Site Name Information in the Gantt Chart](#)
- [Viewing a Resource's Product Skills Rating](#)

15.3 Unassisted Assignment Option

Perform the following steps to use the Unassisted option to assign a resource of your choice to a task, without using the criteria set and the features of Oracle Scheduler. The Gantt chart displays tasks previously assigned in blue. Move your cursor over a task to view details.

Note: In the Unassisted and Assisted assignment options, Assignment Manager does not return any end dated resources. All resources populated in the Gantt chart are active resources.

Prerequisites

None

Responsibility

Since Assignment Manager is not a stand-alone module, the responsibility will vary depending on the calling application or module.

Navigation

Navigate to the Assignment Manager window.

Steps

1. Select the **Unassisted** option from the Selection Criteria.
2. Make an entry in the Resource Partial Name or Resource Type field.
3. Click **Search**.

The Gantt chart for the resource or resources found appears.

4. Double-click on the preferred resource.

The selection appears in the Resources, Resource Type, Start Time, and End Time fields automatically.

If the selected resource has support site identified in Resource Manager, the support site information also displays in the Support Site Name field.

5. Edit the preferred Start Time and End Time if needed.
6. Click **OK** to save the assignment or click **Cancel** to leave Assignment Manager without saving your changes.

See Also

- [Viewing and Assigning Resources in the Gantt Chart](#)
- [Ownership and Resources](#)
- [Assisted Assignment Option](#)
- [Intelligent Assignment Option](#)
- [Window To Promise Assignment Option](#)

15.4 Intelligent Assignment Option

This functionality has been disabled as a menu choice in assigning resources from an escalation document and a Service Request. It is used only in the Field Service Dispatch Center. Refer to Oracle Field Service documentation for detailed information on how to use this option.

15.5 Assigning with the Window To Promise

This functionality has been disabled as a menu choice in assigning resources from an escalation document and a Service Request. It is used only in the Field Service Dispatch Center. Refer to Oracle Field Service documentation for detailed information on how to use this option.

Viewing Resource Information in Assignment Manager

This chapter discusses different methods for viewing resource information in Assignment manager.

16.1 Overview

Use the following topics to view resource information in Assignment Manager:

- [Viewing and Assigning Resources in the Gantt Chart](#)
- [Viewing Resource Web Availability in the Gantt Chart](#)
- [Viewing Support Site Name Information in the Gantt Chart](#)
- [Viewing a Resource's Product Skills Rating](#)

16.2 Viewing and Assigning Resources in the Gantt Chart

The Gantt chart is a graphical tool embedded in Assignment Manager that provides scheduled tasks based on a specific period of time.

Prerequisites

If the Gantt chart includes the Intelligent and Window to Promise assignment options, then the Thin Client Framework (TCF) server must be configured correctly and running to.

Login

Log in to Oracle Forms.

Responsibility

Because Assignment Manager is not a stand alone application, you must choose the appropriate responsibility for the application with which it is integrated and then access Assignment Manager from within that application. See the [Oracle Assignment Manager Integrations](#) section in the [Introduction to Oracle Assignment Manager](#) Chapter for a list of applications with which Oracle Assignment Manager is integrated.

Navigation

Navigate to the Assignment Manager window.

Steps

1. Select either Assisted, or Unassisted in the Selection Criteria, enter any required search text section, and click **Search**.

The Gantt chart populates with a list of resources in the Resource Name field.

2. View the following information for a specific resource.
 - Shift schedules (yellow background)
 - First available time (green bar)
 - Assigned tasks (blue bar)
 - Escalated tasks (red bar)
 - Travel time (first segment of an assigned task in white)
3. You can drag the scroll bar to move across the Gantt if the shift or current time line is not synchronized properly.
4. Double-click the resource that you wish to assign to a task or a document.

The selected resource name, resource type, start and end time information populates automatically.
5. You can manually change the start and end time, and the date, before clicking **OK** to save the assignment.
6. When you are finished, either close the form or exit the application.

Guidelines

The start and end time information is based on the resource's first availability for a specific task time frame. If the selected resource has shift schedule defined in the

Forms-based Calendar, and the assigned shift is within the task time frame, then the start and end time is based on the assigned shift time.

Shifts are defined in the Oracle Common Application Components Forms-based Calendar.

16.3 Viewing Resource Web Availability in the Gantt Chart

The Resource Web Availability feature is used for web-generated service requests, including those created in the iSupport application. It automatically assigns resources, such as support agents who are currently web available, to work on requests immediately with customers. As a result, an agent can easily determine resources that are currently web available and ready to accept a service request immediately. If a resource is not web available, then a symbol does not appear before the resource name.

Resource web availability is another resource selection criteria added to Assignment Manager to help an agent to select the appropriate resources for service request assignments. After assigning resources through Assignment Manager, the selected resources must still check their work assignment information through the Universal Work Queue (UWQ).

Note: The resource web availability works with Territory Assisted assignment option **only**. The available time indicates the current time, not that for a specific time frame.

Prerequisites

Territory Manager must be installed and set up correctly.

Resources who are web available or unavailable should be identified by selecting Tools > Web Availability from the application menu in the Create Service Requests window or the Search Service Requests window.

Login

Log in to Oracle Forms.

Responsibility

Responsibilities used in Oracle Service and Support applications

Navigation

Perform the following to access Assignment Manger:

1. Access the Forms-based service request window and query the Web generated service request.
2. Manually reassign the resources by first removing the original owner and then click **Assign Request**.

Steps

1. In the Selection Criteria section, choose the Territory Assisted assignment option and click **Search**.

The Gantt chart populates with a list of resources and their schedule.

2. If a resource is web available, there are three asterisks "***" to the left of the resource name.
3. Double-click on the resource who you are going to assign to a task created within a service request, or a service request.

The selected resource name, resource type, start and end time information populates automatically.

4. You can manually change the start and end time, and the date, before clicking **OK** to save the assignment.
5. When you are finished, either close the form or exit the application.

Guidelines

The resource web availability feature is used in the Oracle Support applications for a service request assignment with Territory Assisted assignment option only.

The manual assignment process through the Forms-based service request window to launch the Assignment Manager is used only when a resource reassignment is required.

16.4 Viewing Support Site Name Information

When a resource is selected in Assignment Manager, the support site name that the selected resource belongs to appears automatically in the Support Site Name field at the bottom of the window. This information is useful to determine how close a resource is geographically to the client.

Support site information is defined in the Service Tab of the Forms-based Resource Manager and in the Employees Detail window in HTML Resource Manager.

Prerequisites

A resource's support site information should be identified first in Resource Manager.

Login

Log in to Oracle Forms.

Responsibility

Responsibilities used in Oracle Service application

Navigation

Navigate to the Assignment Manager window.

Steps

1. In the Selection Criteria section, choose one of the assignment options and click **Search**.

The Gantt chart populates with a list of resources and their schedule.

2. Find your resource and click on the resource name.

If the Support Site Name has been defined in Resource Manager, you will see this information at the bottom of the Gantt chart.

3. When you are finished, either close the form or exit the application.

16.5 Viewing a Resource's Product Skills Rating

When assigning a resource to a service request, it is useful to know if the resource is a specialist in a particular area. In addition to viewing a resource's availability or geographical location, a manager can also determine the most appropriate resource for a given task.

An employee or manager can use the HTML-based Resource Manager module to view the skill set and the level of expertise that he possesses. This functionality is primarily used by Teleservice for a service request assignment with Territory Assisted assignment option only.

Employees can rate their skill levels against specific products which are defined in Oracle Inventory. When a service request is created, Assignment Manager searches for the qualified territories against a specific product name specified in that service request. Resources who are assigned to qualified territories (so-called winning territories) display in the Gantt chart with product skill rating information. The best resource can then be selected for the service request assignment. Perform the following steps to view a resources product skills rating.

Prerequisites

Territory Manager must be installed and set up correctly.

Resources must have their skill rating information defined in the HTML Resource Manager module.

Login

Log in to Oracle Forms.

Responsibility

Responsibilities used in Oracle Service application

Navigation

Navigate to the Assignment Manager window.

Steps

1. In the Selection Criteria section, choose Territory Assisted option and click **Search**.
The Gantt chart populates with a list of resources and their skill rating information.
2. Find your resource and click on the resource name. The level associated with that employee appear to the right of the name.
The selected resource name, resource type, start and end time information populates automatically.
3. Click **OK** to save the assignment.

Part IV

Task Manager

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Introduction to Oracle Task Manager](#)
- [Overview of Using the HTML Task Manager](#)
- [Viewing Task Information](#)
- [Managing Tasks](#)
- [Managing Task Preferences](#)
- [Managing Task Contacts](#)
- [Data Security for HTML Tasks](#)
- [Working with Forms-based Tasks](#)
- [Scheduling and Tracking Forms-based Tasks](#)

Introduction to Oracle Task Manager

This chapter covers the following topics:

- [Overview of Oracle Task Manager](#)
- [Forms-based Task Manager User Interface](#)
- [Oracle Task Manager Integrations](#)
- [Integration with Notes and Calendar](#)
- [Process Flow for Oracle Task Manager](#)
- [What's New in This Release](#)
- [Terms and Definitions](#)

17.1 Overview of Oracle Task Manager

Task Manager is integrated with many Oracle applications. It provides an effective mechanism for organizations to respond to customer needs in a timely manner. Use Task Manager to create, assign, manage, sort, and prioritize a task, which is the lowest unit of work.

Typically, you access Task Manager directly to create personal tasks or view tasks assigned to you. It can be called from other Oracle applications to provide integrated solutions or it can be run as a stand-alone product. For example, Oracle Telesales uses Task Manager to assign tasks pertaining to individual consumers, organizations, and organizational contacts.

Using Task Manager, you can create new tasks, update tasks, or assign tasks. You can accept an assigned task, finish the task, and create a new task. The following topics provide additional information on the Task Manager:

- [What is a Task?](#)

- [Task Manager Roles](#)
- [Task Manager Notifications](#)

17.1.1 What is a Task?

A task is defined as the lowest unit of work. It can be assigned to one or more resources. Tasks are managed by the Task Manager and are often scheduled events with defined dates of completion. For example, a support manager of a company can create a task for an employee resource stating, “Please call back customer by 9:00 am.”

A task includes information relating to actions such as resources, appointments, references, dates, contacts, recurrences, and events. You must assign a task to a resource or an object. Continuing from the previous example, once the support manager creates the task to call back the customer, he can:

- Assign a specific resource to perform the task.
- Reference source documentation such as a service request.
- Define the task as repeating so the customer is called every month.

17.1.2 Task Manager Roles

Task Manager roles provide security for a task by ensuring only those directly involved with the task can view it. The following table describes Task Manager Roles.

Table 17–1 Rights of Roles

Roles	Description	Rights
Owner	The person who is in charge of the task.	<p>The owner can reassign the task to another resource. When the task is reassigned, the owner can no longer view it unless they are also an assignee.</p> <p>As an owner you can:</p> <ul style="list-style-type: none"> ▪ View your tasks ▪ Update all fields in the task except the following auto populated fields: Escalation level, Escalation owner Contact information ▪ Reassign your tasks ▪ Soft delete your tasks
Assignee	The person who is actually working on the task.	<p>The assignee can reassign the task to other resource types.</p> <p>As an assignee you can:</p> <ul style="list-style-type: none"> ▪ View your tasks ▪ Update all fields in the task except the following auto populated fields: Escalation level, Escalation owner Contact information ▪ Soft delete your tasks

17.1.3 Task Manager Notifications

The following table describes how task notifications are handled in Task Manager.

Table 17–2 Task Notification

Event	Notify
Task Creation	Owner and all assignees
Task Deletion	Owner and all assignees
Reassign Owner	Old and new owner
Reassign Assignee	Owner, the old and new assignee

Table 17–2 Task Notification

Event	Notify
Status Update of Owner	Owner and all assignees
Priority Update	Owner and all assignees
Type Update	Owner and all assignees
Add Assignee	Owner and new assignee
Delete Assignee	Owner and assignee
Planned, Scheduled, or Actual Start and End Dates Update	Owner and all assignees

17.2 Forms-based Task Manager User Interface

The following tabs are available in Task Manager, once you've created a task and clicked the More button:

- [Task Resources](#)
- [Task Dependencies](#)
- [Task References](#)
- [Tasks Dates](#)
- [Task Contacts](#)
- [Task Recurrences](#)
- [Other Task Information](#)
- [Task Audits](#)

Task Resources

Use the Resources tab to assign personnel information to a task. This window defines resource requirements, assignments, and scheduling information. For example, a resource can be an employee, a group, or a party.

Task Dependencies

Use the Dependencies tab to determine the order of tasks. When an action requires the creation of several tasks, you can set a dependency for each task. However, this functionality is currently not enforced.

Task References

Use the References tab to link tasks to different documents or pertinent background information.

Task Recurrences

Use the Recurrences tab to schedule tasks to automatically repeat. Examples of intervals include daily, weekly, monthly, or yearly occurrences. To schedule a recurring task, you must either specify a start date and the number of times you want the task to repeat or the end date.

Task Dates

Use the Dates tab to identify more dates in addition to the planned, scheduled, and actual dates types. Use this tab to track task progress by entering date information after each task milestones. Examples include task creation, resource reservation, or task completion.

Task Contacts

Use the Contacts tab to create and manage multiple customer contacts assigned to a task. Contact information is obtained from customer information. In order to enter this information, you must identify a customer in the main task window.

Other Task Information

Use the Others tab to identify additional task information. You can customize tasks by setting task flags. The Currency and Cost fields identify the currency of a task and if there is a cost associated with it. These fields are used by the Oracle Marketing applications. The following table describes flags in the Others tab.

Table 17-3 Task Flag Descriptions

Flag	Description
Billable	The Billable flag signifies a task as a service that requires billing.
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 book resources that are already assigned to other tasks.
Milestone	The Milestone Flag indicates whether or not the task is a milestone.

Table 17–3 Task Flag Descriptions

Flag	Description
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 would have to be closed to close the service request.

Task Audits

Use the Audits tab to view changes made to your tasks. The task audit record documents the date and history of the task change. Each update to a task results in an entry to the task audit record. Each record provides a trail from the original task creation to the current task status. Each row documents the status of each task change every time the task is saved.

Task Templates

Use task templates to make task creation simple and quick. Once a template is defined, you can specify resource requirements, create dependencies, and schedule repeating tasks.

Task Template Groups

Use task template groups to pre-define multiple commonly used tasks for different activities (document type), such as service requests, escalations, tasks, and sales opportunities. When creating tasks from a task template, you can select the appropriate template group to generate tasks simultaneously.

For example, A service department constantly receives requests to fix computer problems. Accomplishing this assignment usually involves three required tasks including customer appointment, computer repair, and progress update. John Smith, a service director, requests the creation of a task template group used specifically for a service request called PC Repair which covers all these three tasks defined in a template format with task information specified, such as the task type, priority, and status.

17.3 Oracle Task Manager Integrations

Task Manager uses the following to provide functionality:

- Oracle Trading Community Architecture (TCA) to locate the customer contact information when creating a task in relation to a customer.

- Resource Manager to locate resources (task owner and assignee) for a task.
- Assignment Manager to assist in locating a qualified resource (task owner and assignee) for a task. Assignment Manager can use the Territory Assisted assignment option to locate the right resource assigned to a specific territory.
- The Notes Module to create a note for a task.
- Oracle Workflow to send a workflow notification to an owner, assignee, group, or team, about a new or updated task.
- Escalation Manager to escalate a task. Escalation Manager also uses Oracle Workflow to send workflow notifications to appropriate resources when escalating a task, defect, or service request.

Task Manager is widely used by the following modules across Oracle e-Business Suite:

- Escalation Manager uses Task Manager to create tasks associated with an escalation document.
- Universal Work Queue (UWQ) uses the Task Manager to display tasks.
- The HTML and Forms-based Calendars both use Task Manager to display tasks and appointments on different calendar views, such as daily, weekly, and monthly views.
- Assignment Manager uses the Forms-based Task Manager to determine task duration.
- Service applications use Task Manager to create tasks associated with service requests.
- Sales applications use Task Manager to create tasks associated with opportunities and leads.
- Marketing uses Task Manager to create tasks associated with marketing campaigns.
- Contract applications use Task Manager to create tasks associated with contracts.

17.4 Notes and Calendar Integration

Use Task Manager to effectively manage your daily tasks. You can click the hyperlink for a task or appointment, and access the details for that specific object.

The key functionality of the HTML Calendar, which is integrated with the HTML Task Manager, includes:

- Viewing Your Calendar
- Managing Your Appointments

The HTML Task Manager is also integrated with the HTML Notes module. Use the Notes module to provide additional information for a task. The key functionality of the Notes module includes:

- Searching for a Note
- Creating a Note
- Attaching a Document to a Note
- Viewing all Notes
- Viewing Note Details

17.5 Process Flow for Oracle Task Manager

The following table describes the order and process of using the HTML Task Manager.

Table 17–4 Task Manager Process

Steps	Description
View Your Tasks	View your tasks.
View Task Details	(Optional) View the details of a previously created task.
Create Saved Searches for Task	(Optional) Create a personalized saved searches that you can use to search for specific tasks.
Create Tasks	Create a task.
Relate Tasks to Business Objects	(Optional) Relate a task to a business object, such as a marketing campaign.
Assign Tasks	Assign a task to a resource.
Define Task Efforts	(Optional) Manage your task efforts.
Create Repeating Tasks	(Optional) Create a repeating task.
Manage Task Contacts	(Optional) Manage and import task contacts.
View, Create, and Add Attachments	(Optional) View, create, and add an attachment to a task.

Table 17–4 Task Manager Process

Steps	Description
Work with Notes	(Optional) Add more details to your task using the Notes module.
Work with Calendar	(Optional) Manage your daily activities, appointments, and tasks using the HTML calendar.
Mass Creating Tasks	(Optional) Create a separate task for each of the selected resources in a group or team.

17.6 What's New in This Release

This release of Oracle Common Application Components has the following new features in Task Manager subsequent to the 11.5.8 release:

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 you to view the task details first and then decide whether or not to delete the task. Once a task is deleted, you 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.

17.7 Terms and Definitions

The following table describe terms associated with Task Manager.

Table 17–5 Terms and Definitions

Term	Description
Assignee	An assignee is the person assigned to a task. An assignee can accept, refuse, or reassign the task.
Contact	A contact contains information about a person and how to locate them such as their phone number and email address, in regards to the task.
Creator	The creator is the originator of the task and defaults to the owner.
Full Access	Full Access is the ability to view, edit, and delete a task. This access type does not include the capability of granting access to others.
HTML Calendar	Use the HTML Calendar to effectively manage your daily activities, appointments, notes, and tasks.
Notes	Notes provide additional text locations where you can specify more detail, if needed. A note can be added to a task.
OSO	This is an acronym for Oracle Sales Online.
OMO	This is an acronym for Oracle Marketing Online.
Owner	An owner is the person responsible for the task. They are not necessary the person who performs the task.
Party	A party is an entity that can enter into a business relationship.
Read-only	Read-only access is the ability to view a task without making modifications to it. You may not edit or delete any information.

Table 17–5 Terms and Definitions

Term	Description
Reference	A reference occurs when one task relates to another document. For example, a task can be related to a service request.
Repeating Task	A repeating task automatically reoccurs in a specified time increment such as daily, weekly, monthly, or yearly.
Resource	A resource is the basic element of the Resource Manager and is defined as people, places and things.
Source Object	The source object defines the origin of the task, for example, Sales, Service, or Task Manager.
Tasks	A task is the lowest unit of work. Tasks are assignments that detail the actions required of resources or other objects.
Task Type	A task type defines the nature of the task such as a callback or a meeting, which helps organize your tasks.

Overview of Using the HTML Task Manager

This chapter covers the following topics:

- [Accessing the Oracle Task Manager Interface](#)
- [Summary of Oracle Task Manager Tasks](#)

18.1 Accessing the Oracle Task Manager Interface

There are several ways to access Task Manager. It can be run as a stand-alone module where you access tasks directly to create personal tasks or it can be called from other modules to provide integrated solutions. You can also access Task Manager through the HTML Calendar module from a link on the main navigation bar. The following modules use the Task Manager to create and manage tasks:

- Oracle Marketing Online (HTML)
- Oracle Sales Online (HTML)
- Oracle Service (Forms and HTML)

Each module has an individual login. Perform the following steps to log in to Task Manager.

Prerequisites

You must be an employee resource to use calendar.

Responsibility

End user

Navigation

Navigate to an application integrated with Task Manager.

Steps

1. Enter your user ID.
2. Enter your password and click **Go**.
3. Click **Tasks**.

The Task Summary window opens with a list of your current tasks.

18.2 Summary of Oracle Task Manager Tasks

Use Oracle Task Manager to perform the following types of tasks:

- Chapter 19, Viewing Task Information
- Chapter 20, Managing Tasks
- Chapter 21, Managing Task Preferences
- Chapter 22, Managing Task Contacts
- Chapter 23, Data Security for HTML Tasks
- Chapter 24, Working with Forms-based Tasks
- Chapter 25, Scheduling and Tracking Forms-based Tasks

Viewing Task Information

This chapter covers the following topics:

- [Viewing the Task Summary](#)
- [Using the Quick Find Search](#)
- [Customizing Your Task Summary Display Options](#)
- [Selecting Sort Options](#)
- [Personalizing Your Saved Searches](#)
- [Viewing Task Details](#)

19.1 Viewing the Task Summary

Use the Task Summary to:

- View a list of your tasks
- Update tasks
- Create a new task by clicking the Create button
- Create a quick task by clicking the Quick Create button
- Remove a task
- Select to display another saved search
- Display task details

The information in the Task Summary is the result of your default search query. If the task is assigned to a group or team, you must search for that task separately.

If the Quick Create button is not visible in the Task Summary window, then your system administrator must set the *Task Manager: Create Quick Task* profile option.

Note:

- Use the First, Previous, Next, and Last links to view all of your existing tasks.
 - It is mandatory to display either the task name or the task number fields. If you remove both of these columns, the task name appears automatically.
 - You must be the owner or assignee of a task to have full access to it. If you are not the owner or assignee, the task will appear in read-only format.
-
-

Perform the following steps to view the Task Summary window.

Prerequisites

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

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Task Summary window by clicking Tasks on the main navigation bar.

Steps

1. In the Task Summary window, to view a previously saved search, select it from the Saved Searches drop-down list and click **Search**.
2. Click **Personalize** to access the Task Search window where you can enter search requirements, and then save those requirements as a new search.
3. Click **Create Task** to create a task or click **Create Quick Task** to create a simple task.
4. Click the **CSV** icon to save your list of tasks in Microsoft Excel.

5. Click on any table heading, except for flexfields, to sort the corresponding column.
6. Click any hyperlink or click the **Task Details** icon to view the details of the record.

If you are not the owner or the assignee of the task, the task details window appears in read-only format.

See Also

[Customizing your Task Summary Display Options](#)

19.2 Using the Quick Find Search

Use the Quick Find search to find your appointments, tasks, notes, employees, and groups. Perform the following steps to execute a search.

Note: You must run the Rebuilding Intermedia Index for Task Names concurrent program periodically to see new and updated tasks, and to be able to search by task name in the quick find. Please see the *Oracle Common Application Components Implementation Guide*, Appendix C, for more information on concurrent programs.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to any Task Manager window.

Steps

1. Using the Quick Find drop-down list, select search criteria:
 - Appointments
 - Task
 - Notes

- Employees
 - Groups
2. Enter a keyword or letter (at least three characters) for the search and click **Go**. The Search Results window opens.
 3. Click any item to display the details.

19.3 Customizing Your Task Summary Display Options

Use the Task Search window to define display options for the Task Summary window.

Perform the following steps to view the details of a specific task.

Prerequisites

A task must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Task Search window by clicking Personalize in the Task Summary.

Steps

1. Use the drop-down list to select the Saved Search you want to modify.
2. Scroll down to the Display Options region.
3. From the Available column, select which columns you want to appear in the Task Summary window. To select multiple columns, hold down the [Ctrl] key and select each column with your mouse.
4. When you are finished selecting the columns you want, click > to move them to the displayed column or click >> to move all the undisplayed columns over to the displayed column.
5. Click the Delete button to delete your saved searches if necessary. After deleting your saved searches, you are directed to the Task Search screen with a confirmation message. If you delete the seeded query, then an error message should be displayed in the screen.

Guidelines

The following table describes columns available in the Display Options region of the Task Search window.

Table 19–1 Task Search Display Options Region Description

Column Name	Description
Actual End Date	This is the actual end date of the task.
Actual Start Date	This is the actual start date of the task.
Category	This is the task category.
Created By	This is the username of the person who created the task.
Creation Date	This is the date the task was created.
Description	This is the description of the task.
Flexfield 1 (Market)	This column can be customized for your specific business needs.
Flexfield 2 (Segment)	This column can be customized for your specific business needs.
Flexfield 3	This column can be customized for your specific business needs.
Last Updated By	This is the username of the person who last updated the task.
Last Updated Date	This is the date the task was last updated.
Owner	This is the name of the owner of the task.
Parent Task	This is the name of the parent task.
Planned End Date	This is the planned end date of the task.
Planned Start Date	This is the planned start date of the task.
Priority	This is the task priority.
Private	This indicates whether or not the task is private.
Recurring	This indicates whether or not the task is recurring.
Scheduled End Date	This is the scheduled end date of the task.
Scheduled Start Date	This is the scheduled start date of the task.
Source	This is the source of the task.

Table 19–1 Task Search Display Options Region Description

Column Name	Description
Source Name	This is the source name.
Status	This is the status of the task.
Subject	This is the task name. This field is mandatory if the task number column is not shown.
Task Number	This is the task number. This field is mandatory if task name is not shown.
Time Zone	This is the time zone where the task occurs.
Type	This is the task type.

19.4 Selecting Sort Options

Use the Task Search window to define how you want the rows of tasks to sort in the Task Summary window. After entering search criteria and before performing a search, you can manage your sort results by entering sort criteria in the Sort Order region. Use the drop-down list to select an appropriate value in the Sort Rows By field, Then By, and Then By fields as well as sort by an ascending or a descending order for each of the selected sort criteria.

For example, first sort by status with an ascending order, then by priority with an ascending order, and finally by owner with a descending order. In addition, you can enter the number of rows visible in one page after performing a search.

Perform the following steps to view the details of a specific task.

Prerequisites

A task must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Task Search window by clicking Personalize in the Task Summary.

Steps

1. Use the drop-down list in the Sort Order region to select how you want your rows of tasks to sort. Sort options include:

- Number
 - Source
 - Status
 - Task Type
 - Category
 - Parent Task
 - Subject
 - Description
 - Priority
 - Owner
2. Use the corresponding drop-down list to select whether or not you want the list to sort in descending or ascending order.
 3. Use the drop-down list to select the next type of sort (Then by).
 4. Use the corresponding drop-down list to select whether or not you want the list to sort in descending or ascending order.
 5. Use the drop-down list to select the next type of sort (Then by).
 6. Use the corresponding drop-down list to select whether or not you want the list to sort in descending or ascending order.
 7. Enter the number of rows that you want to display in the Task Summary window.
 8. Click **Save**.

See Also

- [Viewing the Task Summary](#)
- [Personalizing Your Saved Searches](#)

19.5 Personalizing Your Saved Searches

Use the Task Search window to create a personalized saved search. You can personalize your search results in four ways:

- Create search criteria and save it as a personalized search.

- Select only the columns you want to display in the Task Summary window.
- Sort records in ascending or descending order.
- Specify how many rows of task records you want to display in the Task Summary window.

You can delete your saved search records. After each deletion, you are directed to the Task Search screen with a confirmation message. Only the seeded "My Open Tasks" saved search is not deletable. If you attempt to delete the seeded query, then an error message will be displayed on the screen.

Note: Before entering information for a new saved search, you must click **Clear** in the Task Search window. Otherwise, the information that appears in each field reflects the default Saved Search that appears in the drop-down list.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Task Search window by clicking Personalize in the Task Summary.

Steps

1. Enter the following information:
 - a. Enter the task Subject for the purpose of task creation.
 - b. Enter the Task Number.
 - c. From the Status multi-select list box, select the task status.
 - d. From the Types multi-select list box, select the task type.
 - e. From the Priority multi-select list box, select the task priority.
 - f. From the Category multi-select list box, select the task category.
 - g. Select the Include **Private** check box to include your private tasks in your search.

7. Enter the following reference information:
 - a. Use the drop-down list to select the resource type.
 - b. Enter the resource name or click **Go** to access the lookup tool and search for the resource name.

The description is automatically populated, if available.
8. In the Task Additional Information region, enter the flexfield information in the Market (flexfield 1) and Segment (flexfield 2) fields.
9. See the following for additional information on the remaining tables of the Task Search window:
 - a. To define display options, see [Customizing Your Task Summary Display Options](#).
 - b. To select sort options, See [Selecting Sort Options](#).
10. Select any of the following check boxes to add additional information to your saved search.
 - Select the **Use as Summary Page Default** check box to have the search execute upon opening the Task Summary window.
 - Select the **Use as Default Query for Combo View** check box to have the search execute upon opening the Combination window in Calendar.
11. Click **Save** to save the personalized search or click **Save and Search** to save the search and search immediately for any tasks matching the criteria you specified.
12. Click **Delete** to delete your saved searches if necessary. After deleting your saved searches, you are directed to the Task Search screen with a confirmation message. If you delete the seeded query, then an error message should be displayed in the screen.

The Task Summary window opens displaying your search results.

See Also

- [Viewing the Task Summary](#)
- [Creating a Task](#)

19.6 Viewing Task Details

Use the Task Details window to update or delete a task. Any applicable values entered in the Create Task window are carried over to the Task Details window. Once a task is deleted, you are taken to the Task Summary window with a confirmation message.

Perform the following steps to view the details of a specific task.

Note:

- Click the source number link to view the source or the name link to view the details of that record.
 - If a product integrated with Task Manager passes customer data into the system, the information automatically populates the customer area of the Task Details window based on the source.
-
-

Prerequisites

A task must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Task Details window.

Steps

1. Click **Task** on the main navigation bar.
The Task Summary window opens.
2. Click the task name to view more information about the task.
3. Click **Delete** to delete an existing saved task. Once a task is deleted, you are taken to the Task Summary window with a confirmation message.

See Also

- [Viewing the Task Summary](#)
- [Creating a Task](#)

Managing Tasks

This chapter covers the following topics:

- [Creating a Task](#)
- [Defining Dates for a Task](#)
- [Associating a Task with a Customer](#)
- [Relating Tasks to Source Objects](#)
- [Assigning a Resource to a Task](#)
- [Specifying the Task Effort](#)
- [Creating a Repeating Task or Appointment](#)
- [Mass Creating Tasks](#)
- [Viewing Existing Attachments](#)
- [Adding an Attachment](#)
- [Viewing Your Task Bin](#)
- [Editing Your Task Bin](#)
- [Reassigning Tasks](#)
- [Synchronizing Tasks](#)

20.1 Creating a Task

Use the Create Task window to define basic task information, assign resources, and relate customer information to the task. If you select the Quick Create button, the window that appears is a light version of the Create Task window.

Please note that only the mapped task types and task priorities are listed in the relevant list of value options. If none of the task types or priorities is mapped to your object, then all types and priorities will be displayed in the list of values.

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*.

Task's Customer Information

If you try to update customer information for an existing task, a 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, you must then select new contacts from the newly added customer for that task. If you decline this change after seeing this message, then there should be no change to the original customer.

Task Reference Creation for a Resource Category "Party"

When a new task is created with resources (owner, assignee, customer, and customer contact information) of category "party" in the Forms-based or HTML Tasks, additional party references are also created and visible in the Tasks:

- If the party type is Source, then one reference for that source object 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 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 the resource type is Person, then one reference for that person will be created for every task assignment.
- If the resource type is Relationship, then three references (relationship, person, and organization) will be created for every task assignment.

- If the resource type is Person, then two references (person, and relationship between the customer and organization) will be created for every customer contact.

However, if the reference creation adds any duplicate references in 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.

Note:

- If you plan on creating more than one task, click **Create and Create Another** once you've added all the information to the first task. This saves your task and returns you to the Create Task window so you can create another task.
 - You must define task statuses in Forms.
 - If you select the **Display On Calendar** check box in the Assign To region, then you must enter a start and end date in the Dates region.
-
-

Perform the following steps to create a task.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Create Task window by clicking Create in the Task Summary.

Steps

1. Define the following information.
 - a. Select a task type from the drop-down list. Only the mapped task types to your source object will be listed. If none of the task types is mapped to your source object, then all task types will be displayed in the list of values.
 - b. Enter a subject for the task.
 - c. Enter a description for the task.
 - d. Select the priority level for the task from the drop-down list. Only the mapped task priorities to your source object will be listed. If none of the task priorities is mapped to your source object, then all task priorities will be displayed in the list of values.
 - e. Select the task status from the drop-down list.

The resource's job title, phone number, and email address are automatically populated if the information is available.
 - f. Select the task category from the drop-down list.
 - g. Select the **Private** check box if this is a personal task and you do not want other resources to view it.

Any resource associated with the task, for example an assignee, has access to it, even if the task is marked as private.
2. Enter a parent task for the task or click **Go** to access the lookup tool.
 - a. Enter at least three characters and click **Search**.

A list of tasks appear in the window.
 - b. Select the option button of the task to populate the Parent Task field and click **Select**.

The task populates the text field.
3. Select the **Notify** check box if you want to notify an assignee of a newly created task.
4. See the following for additional information on the remaining tables of the Create Task window:
 - a. To define a date, see [Defining Dates for a Task](#).
 - b. To define assignees, see [Assigning a Resource to a Task](#).

- c. To enter customer information, See [Associating a Task with a Customer](#).
 - d. To relate an object to a task, see [Relating Tasks to Source Objects](#).
5. Click **Clear** to clear all fields and enter new values.
6. Click either **Create**, to create a single task or click **Create and Create Another** to return to the Create Task window in order to create another task.

See Also

- [Viewing the Task Summary](#)
- [Viewing Task Details](#)
- [Adding and Removing Task Categories](#)

20.2 Defining Dates for the Task

Perform the following steps to define dates in the Create Task window.

Note:

- When you are defining planned, scheduled, or actual dates, the default value is set to scheduled. You can manually override this by selecting another option button and defining your information in the corresponding text field.
 - If the **Display on Calendar** checkbox in the Assignments window is selected, then you must define a start and end date.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Create Task window by clicking Create in the Task Summary.

Steps

1. Under the Dates region in the Create Task window, use the drop-down list to select the time zone where the appointment is scheduled. This overrides the time zone set in your preferences.
 - a. Enter at least two characters in the search field and click **Search**.

A list of time zones appear in the window.
 - b. Select the option button of the time zone you want to define and click **Select**.

The name populates the text field.
2. In the Display on Calendar field, select the option button that defines the task date types (Planned, Scheduled, or Actual) displayed in your personal calendar.
3. Click the **Date Picker** in the column that corresponds to the task date type selected in step 2.

The Select a Date pop-up window opens.
4. Use the drop-down list to change the calendar month.
5. Select a start date for the task by clicking on the date and close the window to populate the field.
6. Use the drop-down list to select a start time for the task.
7. Repeat steps 2-6 to define the end date for the task.
8. Use the drop-down list to select an end time for the task.

See Also

- [Personalizing Your Saved Searches](#)
- [Creating a Task](#)

20.3 Associating a Task with a Customer

You can associate a task to customers. If you want to identify customer contacts information, not employee contacts, in the Contacts window, then you must enter customer information here.

When updating customer information for an existing task, you will see a warning message appears stating "The customer for this task will change. Changing the customer will remove the existing contacts for this task." After you confirm 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, you must select new contacts from the newly added customer for that task through the Contacts hyperlink. If you decline this change after seeing this message, then there should be no change to the original customer.

In addition, when you manually update or add any owners, assignees or customers with a resource of category party in the Forms-based or HTML Tasks, additional party references are also created and visible in the Tasks. If the customer type is Person (such as Jeff Walsh) or Organization (such as Oracle Corporation), then one reference for that person or organization will be created. If the customer type is Relationship (such as Jeff Walsh at Oracle Corporation), 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)

However, if it adds any duplicate references in 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.

When you update a customer with a different one, existing task references for the old customer are removed and new references are created.

Perform the following steps to associate a task with a customer in the Create Task window.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Create Task window by clicking Create in the Task Summary.

Steps

1. Under the Customer region in the Create Task window, select a customer type from the drop-down list. Options include Organization, Person, or Relationship.
2. Enter the customer's account number or click **Go** to search for the account number.
 - a. Enter at least three characters and click **Search**.

A list of account numbers appear in the window.
 - b. Select the option button of the account number to populate the Name field.
3. Enter the name of the customer or click **Go** to access the customer lookup tool.
 - a. Enter at least three characters and click **Search**.

A list of customers appear in the window.
 - b. Select the option button of the customer name to populate the Name field.
4. Enter the customer's address or click **Go** to get a list of addresses for the customer.
5. Select the address to populate the text field. This also populates the Address 2 text field with the city, state, and country and the customer number field.
6. Enter the customer's account number or click **Go** to get a list of account numbers for the customer, if available.
7. Select the account number to populate the text field.
8. Enter the customer's phone number or click **Go** to get a list of phone numbers for the customer, if available.
9. Select the phone number (if any) to populate the text field.

See Also

- [Personalizing Your Saved Searches](#)
- [Creating a Task](#)

20.4 Relating Tasks to Source Objects

Use the Reference window to relate a task to a business object, such as a marketing campaign.

For example, if a task relates to a specific business campaign, you can relate it to that campaign so the information appears to anyone who views the task. A note can be related to two different tasks, but the same note cannot be related to the same task twice.

Since Task Manager leverages the Application Object Library (AOL) data security model to provide new security rules in the "Relate To" list of values (LOV), it may change the behavior of relating tasks to a business object depending on the "Relate To" LOV security rules setup in Tasks.

See [Customizing HTML Task Security](#) chapter in *Oracle Common Application Components Implementation Guide* about the customizing resource list of values security.

Note: Click the source number link to view the source or the name link to view the details of the record.

Perform the following steps to relate a task to another business object.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the References window by clicking References in the Task Details window.

Steps

1. Select the Related Object from the drop-down list.
2. Enter the name of the business object (application) or enter at least two characters in the search field or click **Go** to access the lookup tool.

A list of business objects appear in the window.
3. Select the business object you want to reference the business object and click **Select**.

The field populates with the business object.

4. Click **Update** to add the information to the table.
5. Select the **Remove** check box next to the business object and click **Update** to delete it from the list.

The information is added to the Type and Name columns and a confirmation window opens to confirm the information was updated.

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

See Also

- [Personalizing Your Saved Searches](#)
- [Creating a Task](#)

20.5 Assigning a Resource to a Task

Use the Assignments window to assign a task to a resource. When you specify an assignment, the information appears in the Assign To region of the Task Summary window. A task can only have one owner but can have more than one assignee.

Please note that any inactive resources will not be displayed in the resource list of values.

In addition, when you manually update or add any resources (owners or assignees) with a resource of category party in the Forms-based or HTML Tasks, additional party references are also created and visible in the Tasks. If the resource type is Person (such as Jeff Walsh), then one reference of that person for every task assignment will be created. If the resource type is Relationship, then three associated party references will be created for every task assignment:

- 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)

However, if it adds any duplicate references in 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.

When an assignment is updated with a different resource, existing task references for the old assignment are removed and new references are created.

Perform the following steps to assign a resource to a task.

Note:

- You can change the owner of a task but you cannot delete the owner altogether.
 - Click the source number link to view the source or the name link to view the details of the record.
-
-

Prerequisites

A task must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Assignments window from the Task Details window.

Steps

1. Select the **Display on Calendar** check box to display the task on your personal calendar.
2. Use the drop-down list to select the Resource Type in the Owner or Assignee Roles field.
3. Enter the name of the resource that you want to assign to the task or click **Go** to search for a resource.

The search window opens.

- a. Enter at least two characters in the search field and click **Search**.

A list of resources appear in the window.

- b. Select the option button of the resource name you want to add and click **Select**.

The resource name populates the text field.

4. Use the drop-down list to select the status. You must set up status types in the Forms-based Task Manager.
5. After entering resource name for the task, the following resource information populated automatically:
 - Job title
 - Email address
 - Phone number information automatically populates, if available.
6. Click **Update**.

The assignment information is saved.

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

Guidelines

In order to delete a selected resource, use the **Remove** check box. If you manually delete a resource name in the Name field without changing the resource type, the selected resource, regardless an owner or assignee, is still valid. This is because the resource id is stored as a hidden parameter if you leave the resource type unchanged. Make sure to change the resource type drop-down list if you trying to delete a resource name in the Assignments window.

See Also

- [Personalizing Your Saved Searches](#)
- [Creating a Task](#)

20.6 Specifying the Task Effort

Use the Efforts window to specify either the planned, duration, or actual effort. Each effort is defined as follows:

- **Planned:** This is the effort required to complete a task. For example, a task requires 10 hours work and is assigned to Mary and John. Each needs to contribute five hours to complete the assignment. The planned effort to complete this task is 10 hours.

- **Duration:** This is the actual time it takes for the completion of the task. For example, if Mary starts her work from 10:00 to 14:00, and John continues from 14:00 to 19:00, then the duration of this task is nine hours (10:00-19:00.) If John starts at 10:00, instead of 14:00, and finishes at 15:00, then the duration is five hours (10:00-15:00.)
- **Actual:** This is the actual effort for a task. For example, the actual effort for Mary to complete her work is four hours (10:00-14:00) and for John is five hours (10:00-15:00.)

Perform the following steps the define the Task Effort.

Note: Click the source number link to view the source or the name link to view the details of the record.

Prerequisites

A task must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Efforts window, from the Task Details window.

Steps

1. Enter the duration unit required to complete the task in the Duration text field.
2. Select the unit of measure (UOM) for the duration. Options include: hours and minutes.
3. Enter the percentage complete for the task.
4. Enter the planned effort unit.
5. Use the drop-down list to select the UOM for the planned effort.
6. Enter the actual effort.
7. Use the drop-down list to select the UOM for the actual effort.
8. Click **Update** to save the effort.

See Also

[Creating a Task](#)

20.7 Creating a Repeating Task or Appointment

Use the Repeating window to create a series of tasks for a regularly scheduled task or appointment. The start date must be specified before you can create a repeating task or appointment.

After creating a repeating task or appointment, you can further update the repeating rule by changing the frequency of a repeating series.

In addition, similar to the delete a repeating appointment feature, after updating a repeating appointment or inviting new attendees for the selected repeating appointment, you need to make selections in the Update Appointments window about how the changes are to be implemented (only this appointment, all appointments, or all future appointments). Invitees of a repeating appointment or task can either reject all or accept all of them, instead of responding to each invitation individually.

Note:

- Click the source number link to view the source or the name link to view the details of the record.
 - After a repeating task is created, any additional modification impacts only the next occurrence of the task.
-
-

Perform the following steps to create a repeating task or appointment.

Prerequisites

A task must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Repeating window from the Task Details or Appointment Details window.

Steps

1. In the Repeating window, the Start Date field is populated with the date the task or appointment was originally created. You cannot edit this date.
2. Click the **Date Picker** to access the select a date window and select an End Date for the repeating task or enter a number in the count text field to define the number of times you want the task to repeat. You must use the date picker to select a date. Manually entering dates causes an error to occur.
3. Select the option button for the frequency of the repeating task or appointment. Options include none, daily, weekly, monthly, and yearly.
 - a. Select None and the task does not repeat.
 - b. Select Daily and enter the number of days you want the task to repeat.
 - c. Select Weekly and enter the number of weeks and select the check box for each day you want it to occur.
 - d. Select Monthly and enter the number of months and select the check box for each day you want it to occur.
 - e. Select Yearly and enter the number of years and the day or the particular day of the month you want the task to occur.
4. Click **Update** to save your repeating task or appointment. A confirmation window opens confirming the repeating task was created. You can update the repeating rule by changing the frequency of a repeating series if you want. Click the Update again to confirm the changes.
5. Click **Restore** to reset the original values in the window.

See Also

[Creating a Task](#)

20.8 Mass Creating Tasks

Use the Mass Create window to create a separate task for each selected resources. When you use the Mass Create feature, a new task is created for each resource in a group or team and that resource is automatically assigned as the owner of the task. Also, once the task is created, the creator of the mass created task may not perform any updates to the new task.

Note: Click the source number link to view the source or the name link to view the details of the record.

Perform the following steps to mass create tasks.

Prerequisites

A task must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Mass Create window from the Task Details window.

Steps

1. In the Mass Create window, select the resource type (group or team) from the drop-down list.
2. Enter the name of the resource or click **Go** to search for the resource.
 - a. Enter at least two characters in the search field and click **Search**.

A list of resources appear in the window.
 - b. Select the option button of the resource you want to add and click **Select**.

The information populates the text field.
3. Select the **Keep Record** check box to copy the task to a group or team member even if one already exist for the owner.
4. Select the **Copy Notes** check box to create a copy of any note attached to the task.
5. Click **Create**.

A task for each member of the group or team is assigned and each individual becomes the owner of their task.

See Also

[Creating Tasks](#)

20.9 Viewing Existing Attachments

See the [HTML Calendar](#) documentation for information regarding Viewing Existing Attachments.

20.10 Adding an Attachment

Use the Attachment feature to link unstructured data such as images, word-processing documents, spreadsheets, or text to their application data. For example, you can link images to items or video to operation instructions. Task Manager supports the ability to add one or more attachments to a task. The attachment can be in the form of a text message, a file, or a URL.

See the [HTML Calendar](#) documentation for information regarding Adding an Attachment.

20.11 Viewing Your Task Bin

If you are using Task Manager integrated with another application within Oracle e-Business Suite, use the task bin as a quick look at your daily tasks, including the task name and end date. If no end date is specified during task creation, "No Date" appears in the date field. The task bin only shows tasks that the logged in user is the owner or assignee and does not display appointments. Perform the following steps to view your task bin.

Note:

- When you switch to another calendar that you are subscribed to, your calendar and task bins still reflect your personal appointments and tasks.
 - For information regarding the Personalize link, please see the *Oracle Applications CRM System Administrator's Guide*.
-
-

Prerequisites

None

Responsibility

Responsibilities to access Oracle Applications that are integrated with HTML Tasks

Navigation

Navigate to your Homepage.

Steps

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

Your Personal Homepage appears containing your task bin. This bin contains a list of your current tasks.

2. Click on any task name to view the details of the record.

The Task Details window opens.

20.12 Editing Your Task Bin

In the task bin, tasks are sorted in the order of the calendar end date and priority. The task bin can be customized to select tasks based on different task statuses and priorities, as well as the update status. Perform the following steps to modify which tasks you want to appear in your task bin.

Note: For information regarding the Personalize link, please see the *Oracle Applications CRM System Administrator's Guide*.

Prerequisites

None

Responsibility

Responsibilities to access Oracle Applications that are integrated with HTML Tasks

Navigation

Navigate to the Parameters window by clicking Edit in your Task bin.

Steps

1. In the Parameters window, use the Show Task Ending drop-down list to select which tasks you want to appear in the task bin. Options include tasks ending:

- Today
- Through tomorrow

- 2 days from now
 - 3 days from now
 - 4 days from now
 - 5 days from now
 - 6 days from now
 - 7 days from now
2. In the Priority multi-select box, select which task priorities you want to appear in the task bin. You can select as many priorities as you want by holding down the [Ctrl] key and selecting each priority with your mouse.
 3. In the Status multi-select box, select which task statuses you want to appear in the task bin. You can select as many statuses as you want by holding down the [Ctrl] key and selecting each priority with your mouse.
 4. Select whether or not you want to show updated tasks in your task bin.
 5. Click **Update** once you've selected all your parameters.

Your Homepage appears showing additional tasks which correspond to the task attributes you selected in the Parameters window.

20.13 Reassigning Tasks

Tasks can be mass reassigned to new owners or assignees by using the Task Reassignment window. These new resources can be of any types that are defined in Resource Manager. For example, you can reassign a task from an employee resource to a supplier contact, party, partner, other, to be hired, resource group or team when the original resource was end dated (became inactive) or due to other business reasons. For example, due to the change of a person's role, as a result, the person is not suitable for the assigned task.

Please note that the **Reassign** button used to launch the Task Reassignment window is located in the Resource Details window, instead of in the Tasks screen. This is because the nature of task reassignment is to change resources for assigned tasks. Therefore, to reassign a task, users need to have the Resource Self Service Administrator responsibility to be able to access the HTML Resource Manager administrator page. In addition, the profile option Task Manager: Mass Task Reassign Access also needs to be set to Yes so that the **Reassign** button is shown in the resource window.

Alternatively, users with the CRM Application Foundation User responsibility can also access the reassign screen, but need to set the value of the profile option JTFRS: Employee Resource Update Access to Any at the user level. This way, users can reassign tasks even if the profile option Task Manager: Mass Task Reassign Access is set to No.

After you log in to Resource Manager with the appropriate responsibility, the first thing is to locate the resource that you want to change in the resource screen. This means the original resource must only be an employee resource or a group resource in this release. After locating the resource, then you can launch the Task Reassignment window by clicking **Reassign**.

During task reassignment process, make sure to identify both of the following items before you commit the change. Otherwise, a warning message appears on the top of the page.

- The tasks that you want the resource to be reassigned from the task list
- Resource type (such as employee resource) and a new resource name for the selected tasks

After you reassign tasks, a confirmation message should be displayed if the selected tasks were reassigned successfully. In addition, workflow notifications should be sent to the old assignee, new assignee, and the task owner if the reassignment is for the task's assignee. If it is an owner reassignment, the notifications should be sent to the old owner and new owner.

It is important to note that task reassignment will not change the task status. In other words, the status will still be the same as it was before reassignment.

Note: Only open tasks can be reassigned. Tasks shown on the Task Reassignment window should not have a status of closed, cancelled, reject or completed.

Perform the following steps to reassign tasks to another resource.

Prerequisites

Locate the resource whose tasks need to be reassigned in the Resource Details window.

The profile option Task Manager: Mass Task Reassign Access should be set to Yes.

The Mass Task Reassignment window is Declarative Page Flows (DPF) enabled and needs to be registered in business flows. How to register the screen in business

flows, see *Oracle CRM System Administrator Console Concepts and Procedures* for details.

Responsibility

Resource Self Service Administrator responsibility

CRM Application Foundation User responsibility with the profile option JTFRS: Employee Resource Update Access set to Any at the user level

Navigation

Navigate to the People tab > Employee subtab or Group subtab to locate the resource whose tasks need to be reassigned.

Steps

1. Click the resource name in the Employee or Group subtab.
This opens the Resource Details window.
2. Click **Reassign** to open the Task Reassignment window.
3. Use the drop-down list to select the type of resource that you want to reassign the tasks.
4. Enter at least two characters and click **Go** to search for the corresponding resource.
5. Select the option button of the resource and click **select**.
6. Select the check box of the tasks you want to reassign or click Select All to select all tasks and click **Apply**.
7. A confirmation message appears if all selected tasks are reassigned successfully.

20.14 Synchronizing Tasks

Oracle Common Application Components supports a two-way synchronization process for the tasks that appear in the HTML Task Manager to the offline devices. This includes all of the open tasks that are owned or assigned to the logged-in user.

Tasks entered either in the Oracle Applications or an offline device (Palm OS or Microsoft Outlook) can be synchronized by using the Intellisync software.

Detailed information about required setup steps and synchronization process, see the following links:

- [What Is the Synchronization Process](#)
- [Required Setups and Configuration](#)
- [Terms and Definitions](#)
- [Synchronization of Tasks](#)
- [Palm and Outlook Synchronization FAQs](#)
- [Troubleshooting Tips](#)
- [Field Mappings](#)

See Also

- [Synchronization of Appointments](#)
- [Synchronization of Business Contacts](#)

Managing Task Preferences

This chapter covers the following topics:

- [Defining Your Preferences](#)
- [Setting User Preferences](#)
- [Viewing Notifications in Your Worklist](#)

21.1 Defining Your Preferences

Task Manager shares some preference options with the HTML Calendar. Use the following links to view information regarding Task Preferences.

- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)

21.2 Setting User Preferences

You can receive either email notifications or workflow notifications, but not both. If you want to receive notifications in your worklist, you must set your Personal Home Page Preferences.

Perform the following steps to set up user preferences to receive workflow notifications.

Prerequisites

A task must already exist.

Responsibility

Preferences (Oracle Self-Service Web Applications)

Navigation

Navigate to your personal homepage.

Steps

1. Enter your User Name and password.
2. Click **Preferences**.
3. Click General Preferences.
4. Select Do Not Send Me Mail in the Send me Electronic Mail drop-down list and click **Apply**.

21.3 Viewing Notifications in Your Worklist

When a task is created, you can be notified by a workflow notification if it is set up properly. Detailed information about responding to workflow notifications, see *Oracle Workflow User's Guide*.

Prerequisites

A task must already exist.

Responsibility

Workflow User Web Applications

Navigation

Navigate to your personal homepage.

Steps

1. Select **Worklist** hyperlink from the Workflow User Web Applications column.
2. The Worklist window opens with workflow notifications displayed.
3. Click on the notification in the Subject column that you want to view.
4. View your selected notification in the Notification Details window.
5. Respond to the notification by selecting an appropriate button in the bottom of the page.

Managing Task Contacts

This chapter covers the following topics:

- [Viewing Task Contact Information](#)
- [Defining Task Contacts](#)
- [Synchronizing Business Contacts](#)

22.1 Viewing Task Contact Information

Use the Task Contacts window to update, delete, and organize your task contacts. Perform the following steps to view task contact information.

Note:

- Click the source number link to view the source or the name link to view the details of the record.
 - If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.
-
-

Prerequisites

A contact must exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Contacts window from the Task Details window.

Steps

1. From the Task Details window, click **Contacts** in the side navigation bar.
2. The Task Contacts window opens displaying your contacts.

See Also

[Defining Task Contacts](#)

22.2 Defining Task Contacts

Use the Task Contacts window to manage employee and customer contact information. To be able to enter customer contact information, you must have customer information specified when creating a task.

Please note that any inactive resources will not be displayed in the resource list of values.

In addition, when you manually update or add any resources (employee or customer contacts) with a resource of category party in the Forms-based or HTML Tasks, additional party references are also created and visible in the Tasks. If the resource type is Person (such as Jeff Walsh), then two associated party references will be created for every contact:

- The relationship between the customer and the contact (such as Jeff Walsh at Oracle Corporation)
- The person itself (Jeff Walsh)

However, if it adds any duplicate references in 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.

When you update a contact with a different contact name, existing task references for the old contact are removed and new references are created.

Task Manager allows you to manually delete existing references that are shared by one or more attributes without problems. For example, if you delete a customer contact name "Jeff Walsh" for Oracle Corporation, then system will automatically delete the contact "Jeff Walsh" as well as the relationship information "Jeff at Oracle

Corporation", but it will leave the organization "Oracle Corporation" unchanged in the system.

Perform the following steps to define a contact.

Prerequisites

There must be contacts to import.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Contacts window from the Task Details window.

Steps

1. Use the drop-down list to select the resource type. Options include Customer and Employee.
2. Enter the resource name or click **Go** to search for the Resource.
 - a. Enter at least two character in the search field and click **Search**.

A list of resources appear in the window.
 - b. Select the option button of the resource and click **Select** to populate the text field.
3. Click the **phone** icon and select the phone number of the selected resource to populate the text field.

The email address automatically populates if the information is available.
4. Select the **Primary** option button if the resource is the primary contact.
5. Click **Update** to save the information.
6. Click **Restore** to revert back to the original data before your last update.
7. Click the **Remove** icon to clear the Resource from the list.

See Also

[Viewing Task Contact Information](#)

22.3 Synchronizing Business Contacts

Oracle supports the synchronization of specific Trading Community Architecture (TCA) business contacts that are available to a user as defined in Oracle Sales Online. This includes uploading and downloading the business contacts from Oracle Common Application Components to offline devices.

Business contacts entered either in the Oracle applications or an offline device (Palm OS or Microsoft Outlook) can be synchronized by using the Intellisync software. However, some business contacts cannot be synchronized. The synchronization rule is based on the definition of business contacts that Oracle Common Application Components supports, and on the existing Oracle Sales Online (OSO) security. See *Oracle Sales Online Implementation Guide* for information.

Detailed information about required setup steps and synchronization process, see the following links:

- [What Is the Synchronization Process](#)
- [Required Setups and Configuration](#)
- [Terms and Definitions](#)
- [Synchronization of Business Contacts](#)
- [Palm and Outlook Synchronization FAQs](#)
- [Troubleshooting Tips](#)
- [Field Mappings](#)

See Also

- [Synchronization of Appointments](#)
- [Synchronization of Tasks](#)

Data Security for HTML Tasks

This chapter covers the following topics:

- [Overview](#)
- [HTML Task Security Rules](#)
 - [Scope of the HTML Task Security Rules](#)
 - [HTML Task Security Access Details](#)

23.1 Overview

When a task is created, who can view, update or delete the task is based on the security rules in Task Manager. Task Manager leverages the Application Object Library (AOL) data security model to provide you with four aspects of security protection (user, network, function, and data levels) for the data entered in the system.

With the finest security controlled in the data level, a specific data record can be further customized and authorized to different users for the security access and modifications.

Detailed information on AOL security framework, refer to *Oracle Applications System Administrator's Guide*.

Note: The data security is enforced only in the HTML Tasks.

23.2 HTML Task Security Rules

In addition to continuing to support the task rules used in the past for the backward compatibility such as calendar grants functionality, based on the AOL Data Security

model, HTML Task Manager now provides additional security rules for users to access the tasks of either stand-alone or context sensitive tasks. In addition, based on the group hierarchy defined in Resource Manager, each group manager can have full access or read only access privilege to his or her direct's HTML tasks only if necessary privileges are granted to the group managers. Furthermore, Task Manager also allows different users to see various resource selections appearing in the resource list of values (LOV) while creating a task.

23.2.1 Scope of the HTML Task Security Rules

Task security rules are applied to Task Summary, Details and Contextual Tasks screens. It will not secure task data accessed through non-Task modules, such as Quick Find screen and Calendar View. These non-Task screens will continue to show the tasks for which the user is the owner or assignee.

In regards to the resource list of values security, it is applied to the major task screens. However, it will not be applied to the Customer/Contact LOV (organization, person, relationships) and References if not based on resources (such as customer/contact, and lead).

23.2.2 HTML Task Security Access Details

In general, HTML Task Manager provides the following security access rules:

For Calendar Grants Functionality

HTML Task Manager supports the calendar grants functionality used in the past when a user grants calendar access privilege (full access or read only) to another user. When this calendar grant is executed, the access for tasks is also given at the same time. The same functionality applies while revoking the grants.

For the Stand-alone Tasks

- A user will have full access (view, update, and delete) to tasks if she or he:
 - Is the owner or assignee of the task
 - Is granted "full access" by another resource (excluding private tasks) using the calendar grants functionality
 - Is granted "full access" by the administrator because of security grants
 - Belongs to the group/team with ownership of the task
 - Belongs to the group/team assigned to the task

- A user will have read only access (view only) to tasks (excluding private tasks) if she or he:
 - Is granted "read only" access by another resource using the calendar grants functionality
 - Is granted "read only" by the administrator because of security grants

Note: For a private task, only the owner and assignee(s) can have full access that private task. In addition, for the security purposes, even the full access is granted to another resources, that private task is excluded from the authorization. None of the grantees can even see that private task.

For the Context Sensitive Tasks

Context sensitive tasks are tasks that are attached to certain business objects, such as tasks created for an object instance (lead or opportunity).

Since task security can be further customized to meet other Oracle Applications needs while integrating with Tasks, who can access the context sensitive tasks can be based on the security defined by the individual application. For example, Oracle Marketing Online (OMO) might implicitly grant users with full access permissions to access certain marketing objects if they are on a team for that object.

Since the implicit task rules are now replaced by the data security rules, in order to provide backward compatibility, Task Manager uses a new profile option *Task Manager: Set Context Data Security* to allow different applications to have a choice to turn the task data security rules on or off. Therefore, who can access contextual tasks depends on the following profile values:

- Full Access (to turn the security off): Any users with access to the related object instance can have full access to the contextual task. All other users will have read only access to the task.
- Security Access (to turn the security on): Only the users with appropriate access privileges can update or view the tasks.

For the Resource List of Values

For the resource list of values (LOV) security access, users may see different resource options populated in the list of values (LOV) when trying to assign resources (owner or assignees) to a task. This is because the resource LOV can be

furthered customized and granted to a different user, user groups, or members of resource group based on individual or business needs.

Note: The resource list of values can be resources of any category (employee, party, partner, supplier contact, group, team, other, and to be hired).

This rule is currently applied to the following task screens:

- Create or Update Task
- Task Assignments
- Task Summary
- Mass Task Reassignment
- Task Search
- Mass Create
- Reference (Relate To) based on resources

For the Manager-Directs Security Access

Based on the resource group hierarchy defined in Resource Manager, each manager can have full access or read only access privilege to his or her direct's HTML tasks in the Task Summary screen (excluding private tasks) if necessary privileges are granted to group managers. This way, for example, sales managers can view their direct's tasks to track possible sales related activities performed for a particular week.

Note: Only the group manager with active manager's role, such as the role is not terminated for that group, can have the access privileges to his or her direct's tasks.

The manager-directs security access only covers the resource reporting hierarchy of one level below. It does not include any multiple levels beneath.

In addition, if a resource group has more than one group managers identified in the reporting hierarchy, then all of the group managers will have the access privileges to the group member's tasks. Managers cannot view any private tasks created by their subordinates even if they have full access privilege.

This functionality is not available out of the box. Please see Customizing HTML Tasks Security chapter in the *Oracle Common Application Components Implementation Guide* on how to implement this manager-directs security access.

Working with Forms-based Tasks

This chapter covers the following topics:

- [Creating, Updating, and Finding Tasks](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Setting Task Flags](#)
- [Documenting Multiple Contact Information](#)
- [Launching the Task Workflow](#)

24.1 Creating, Updating, and Finding Tasks

Use the Task window to create and update a task, or use the Find Task window to search for a task.

If you try to update customer information for an existing task, a 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, you must then select new contacts from the newly added customer for that task. If you decline this change after seeing this message, then there should be no change to the original customer.

In addition, when you manually update or add any owners, assignees or customers with a resource of category party in the Forms-based or HTML Tasks, the associated party references including the party type of relationship, party and organization information will also be created and visible in the Tasks. However, if it adds any duplicate references in 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.

Note: If you want to change or limit the values shown in task types, priorities, status's or references List of Values please see the following information sections in the *Oracle Common Application Components Implementation Guide*.

- Defining Task and Notes Reference Mapping
 - Defining a Status Transition and Assigning Rules
 - Defining Task Status
 - Defining Task Priority
 - Defining Task Types
-
-

Perform the following steps to create, update, or find a task.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Tasks > Tasks**

Steps

1. To find a task using the Find Task window, enter any of the following search criteria and click **Find**:
 - Number
 - Subject
 - Description
 - Type

- Status
 - Priority
 - Source Document
 - Source Value
 - Parent Task
2. You can provide additional information to search for a task in the following regions:
 - Owner
 - Assignee
 - Customer
 - Dates
 3. Select the **Show Only Open Tasks** check box if you only want to view tasks with a status of "Open". If you do not select this check box, all task statuses will appear in your search results unless otherwise specified in the Status field.
 4. Select the **Show Only Escalated Tasks** check box if you want to search for all escalated tasks of all escalation levels.
 5. To create a Task, click **New** in the Find Tasks window.
The Tasks window opens.
 6. Use one of the following procedures to create a task:
 - a. Click **Create Task from Template** to create tasks from a template.
The Create Tasks from Template Group window opens. Select the template information from the list of values (LOV) for the required fields, and click **Create Tasks**.
 - b. Create tasks individually by entering the following basic task information. Use the LOV to enter your information if applicable.
 - Subject: Enter task subject, title, or summary information for your task.
 - Type: Use this field to classify the purposes of your task creation, such as a Follow-up task, or an Appointment task.
 - Status: Use this field to specify the progress of your task, such as Open, Working, or Completed.

- Priority: Use this field to determine the urgency of your task, such as High, Medium, or Low.

Note: The values of the task type, status, and priority fields can be defaulted from the relevant profile options.

In addition, only the mapped task types and mapped task priorities to your source object will be displayed in the relevant list of values. If none of the types or priorities is mapped to your source, then all task types and priorities will be displayed in the list of values.

7. Save your task and click **More**.

The Task Details window opens.

8. Define Requirements by selecting from the LOV for each field. See [Assigning and Scheduling Resources](#) for more information.
9. Enter the task dependencies by selecting from the LOV for each field. See [Setting Dependencies for Tasks](#) for more information.
10. Enter the reference objects by selecting from the LOV for each field. See [Linking Tasks to Source Documentation](#) for more information.
11. Enter the recurrence rules by selecting from the option buttons and the LOV for each field. See [Scheduling Recurring Tasks](#) for more information.
12. Save your task.
The new task number appears in the task spreadtable.
13. If you want to update a task, then perform the following steps:
 - a. Navigate to Task Manager.
 - b. In the Find Tasks window, enter search criteria and click **Find**.
The Tasks window opens.
 - c. Update the information in the window.
 - d. Save your changes.

Guidelines

Clicking **Launch Workflow** in the Tasks window automatically reserves the specified resource and notifies the task owner of task creation.

See Also[Launching Task Workflow](#)

24.2 Setting Dependencies for Tasks

Dependencies determine the order among tasks. When an action requires the creation of several tasks, setting a dependency for each task ensures the completion of a designated task before the start of another task.

Note: The functionality of dependencies is currently not enforced.

For example, a support manager wants an employee to call back to a customer and another employee to follow up with a salesperson. Dependencies can be created to ensure the salesperson is contacted before the customer is called back. Dependent tasks are tasks that are completed in a specific order.

Use the offset feature to organize tasks with time-sensitive restrictions. Set an offset with a numerical value of time. The offset value determines the time that separates the action of an initial task from a subsequent task. This way, tasks are time dependent. For example, you can have a one day (offset) time frame between when the salesperson is contacted and the customer is called back. This allows the salesperson to have one day preparation before the customer is called back.

Please note that the difference between dependencies and parent-child tasks is that a parent task and its child tasks do not have a specific order for completion. They are not, therefore, dependent on each other. The dependent tasks have to follow a specific sequence. If desired, specific time restrictions (offsets) can be specified between each dependent task.

Perform the following steps to set task dependencies.

Note: The Application Object Library: Dependency Types for Task Lookups window is currently not used in Task Manager.

Prerequisites

A task must already exist.

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Tasks > Tasks**

Steps

1. Locate your task first, click **More**.
The Task Details window opens.
2. In the Dependencies tab, select the dependent task number from the list of values (LOV).
The corresponding task name populates the Task Name field.
3. Enter a numerical value in the Offset field.
The Offset value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time-sensitive restrictions.
4. Select from the LOV in the UOM field and click **OK**.
5. Save your task.
A dependency now exists for the task.

See Also

- [Creating, Updating, and Finding Tasks](#)
- [Assigning and Scheduling Resources](#)
- [Linking Tasks to Source Documentation](#)
- [Documenting Multiple Contact Information](#)
- [Setting Task Flags](#)
- [Tracking a Task Record](#)

24.3 Linking Tasks to Source Documentation

You can link a task to a source document to reference pertinent background information. Define source documentation as the original request document that results in the creation of a task. Perform the following steps to link a task to a source document.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Tasks > Tasks**

Steps

1. Locate your task first, click **More**.
The Task Details window opens.
2. In the References tab, select from the list of values (LOV) in the Document Type field.
3. Enter the identification number of the source document in the Number field.
The application name populates the Details field with a description of the reference type.
4. Optionally, enter the resource type information and click **OK**.
The resource type and number populates the Source Doc Type and Source Doc Number fields in the main task list.
5. Double-click the Source Value field to view the source document.
6. Save your task.
The source document is now associated with the corresponding task.

See Also

- [Creating, Updating, and Finding Tasks](#)
- [Assigning and Scheduling Resources](#)
- [Setting Dependencies for Tasks](#)
- [Documenting Multiple Contact Information](#)
- [Setting Task Flags](#)
- [Tracking a Task Record](#)

24.4 Setting Task Flags

Use the Others tab to set task flags to further customize a task. Perform the following steps to set task flags.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Tasks > Tasks**

Steps

1. Locate your task first, click **More**.
The Task Details window opens.
2. In the Others tab, select task flags.
3. Click **OK** and save your task.
The task owner receives the task flagged as a Milestone.

See Also

- [Creating, Updating, and Finding Tasks](#)
- [Assigning and Scheduling Resources](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Documenting Multiple Contact Information](#)
- [Tracking a Task Record](#)

24.5 Documenting Multiple Contact Information

Use the Contacts tab to associate contact information to a task.

Note: You must save the task to make contact information available in the list of values (LOV).

Perform the following steps to document multiple contact information.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Tasks > Tasks**

Steps

1. Locate your task first, click **More**.
The Task Details window opens.
2. In the Contacts tab, enter information in the Contacts fields.
3. Enter the corresponding telephone information.
4. Select the **Primary** check box if the person is the primary contact for the task.
5. Save your task.

Guidelines

Entering multiple contacts and selecting one as the primary contact records the correct communication channel for the selected task.

See Also

- [Creating, Updating, and Finding Tasks](#)
- [Assigning and Scheduling Resources](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Documenting Multiple Contact Information](#)

- [Tracking a Task Record](#)

24.6 Launching the Task Workflow

Use the launch workflow button to notify an assignee of the creation of a task. Perform the following steps to launch a workflow process.

Prerequisites

A task must exist.

Responsibility

CRM Administrator

Navigation

Navigate to **Task and Escalation Manager > Tasks > Tasks**

Steps

1. Locate your task first, click **More**.
The Task Details window opens.
2. Select the Resources tab.
3. Select the assignment information from the list of values (LOV) and click **OK**.
4. In the Tasks window, click **Launch Workflow**.
5. Save your task.
Workflow triggers an email or worklist notification when a task is created or updated.

See Also

[Creating, Updating, and Finding Tasks](#)

Scheduling and Tracking Forms-based Tasks

This chapter covers the following topics:

- [Assigning and Scheduling Resources](#)
- [Scheduling Recurring Tasks](#)
- [Tracking Planned, Scheduled, and Actual Dates](#)
- [Tracking a Task Record](#)

25.1 Assigning and Scheduling Resources

Use the Resources tab to define a specific resource for a task. The task owner assigns and schedules the required resources after selecting the best available options. Perform the following steps to assign and schedule resources.

Note: You can copy information in the Task window by clicking on the spreadtable and selecting the option of copying the cell, the selected row, or all the rows. Once you copy the information, it can be pasted into Microsoft Excel or Microsoft Word.

Prerequisites

None

Responsibility

End User

Navigation

Navigate to Task Manager.

Steps

1. With your task information displayed in the window, click **More**.
The Task Details window opens.
2. In the Requirements region of the Resources tab, select the resource type from the list of values (LOV).
3. In the Assignments region, enter a numerical value in the Unit field.
The unit value determines the number of resources needed to complete the task.
4. Select the resource type and name from the LOV.
5. If you want to schedule a resource, select the **Schedule** check box.
Enter scheduled distance and duration values and select a unit of measure.
6. Select the **Enabled** check box to activate varied resources according to the task.
Use this option to select live resources when updating. For tracking purposes, update the Actual schedule fields after task completion.
7. If you want to update actual schedule information and enter the actual values in the required fields and click **OK**.
8. Save your task.

See Also

- [Creating, Updating, and Finding Tasks](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Documenting Multiple Contact Information](#)
- [Scheduling Recurring Tasks](#)
- [Setting Task Flags](#)
- [Tracking a Task Record](#)

25.2 Scheduling Recurring Tasks

You can schedule a task to automatically repeat on a daily, weekly, monthly, or yearly basis. Perform the following steps to schedule recurring tasks.

Prerequisites

None

Responsibility

End User

Navigation

Navigate to Task Manager.

Steps

1. With your task information displayed in the window, click **More**.
The Task Details window opens.
2. In the Recurrences tab, select an occurrence. Options include daily, weekly, monthly, and yearly.
3. Select from the list of values (LOV) in each required field and click **OK**.
4. Save your task.
The task now reoccurs automatically.

See Also

- [Creating, Updating, and Finding Tasks](#)
- [Assigning and Scheduling Resources](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Documenting Multiple Contact Information](#)
- [Setting Task Flags](#)
- [Tracking a Task Record](#)

25.3 Tracking Planned, Scheduled, and Actual Dates

Track task progress by entering date information after three task milestones:

- Task Creation
- Resource Reservation
- Task Completion

Use this procedure to track planned, scheduled, and actual task dates.

Prerequisites

None

Responsibility

End user

Navigation

Navigate to Task Manager.

Steps

1. In the Find Tasks window, find or create a task.
The Tasks window opens.
2. Enter information into the Planned fields in the Dates region.
The GMT field is populated with the correct Greenwich Mean Time Deviation value.
3. After reserving resources for the task, enter information into the Scheduled fields.
4. Upon task completion, enter final information into the Actual fields.
5. Save your task.

Guidelines

Updating the Actual Start and End Dates in the Resource tab populates the corresponding Actual date fields in the Task window.

See Also

- [Creating, Updating, and Finding Tasks](#)

- [Assigning and Scheduling Resources](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Documenting Multiple Contact Information](#)
- [Scheduling Recurring Tasks](#)
- [Setting Task Flags](#)
- [Tracking a Task Record](#)

25.4 Tracking a Task Record

Use the Audit tab to view the history of a task. The task record provides a trail from the original task status through the current status. Perform the following steps to access the task audit record information.

Prerequisites

None

Responsibility

End user

Navigation

Navigate to Task Manager.

Steps

1. With your task information displayed in the window, click **More**.
The Task Details window opens.
2. In the Audit tab, view the task history.
Each row documents the status of the task. The last row contains the most recent task record.
3. Scroll to the right to view both the old and new values.
4. Click **OK** when you are done viewing the audit record.

See Also

- [Tracking Planned, Scheduled, and Actual Dates](#)
- [Creating, Updating, and Finding Tasks](#)
- [Assigning and Scheduling Resources](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Setting Dependencies for Tasks](#)
- [Linking Tasks to Source Documentation](#)
- [Documenting Multiple Contact Information](#)
- [Scheduling Recurring Tasks](#)
- [Setting Task Flags](#)

Part V

HTML Calendar

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Introduction to the Oracle HTML Calendar](#)
- [Overview of Using the Oracle HTML Calendar](#)
- [Viewing Your Calendar](#)
- [Managing Appointments](#)
- [Customizing Your Calendar Preferences](#)
- [Administering Group Calendars](#)
- [Palm and Outlook Synchronization](#)

Introduction to the Oracle HTML Calendar

This chapter covers the following topics:

- [Overview of Oracle HTML Calendar](#)
- [Oracle Calendar Key Features](#)
- [Integration with Notes and Tasks](#)
- [Oracle Calendar Integrations](#)
- [Process Flow for Oracle Calendar](#)
- [What's New in This Release](#)
- [Terms and Definitions](#)

26.1 Overview of Oracle HTML Calendar

The HTML Calendar allows you to manage daily activities, appointments and other calendar events, such as marketing campaigns. 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 you to manage group activities by using group or public calendars. You 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. All group calendar activities will also be displayed

in your personal calendar views with your desired color in order to distinguish from your personal activities.

The HTML Calendar module is used by many applications in Oracle e-Business Suite such as Oracle Sales Online (OSO), for generic calendar functionality like appointments and tasks as well as to show business entities like events and campaigns. The user can click the hyperlink for the task, appointment, or event and access the details for that specific object. The following topics provide additional information on Calendar:

- [Calendar Rules](#)
- [Types of Calendars](#)
- [Calendar Views](#)
- [Who Uses Calendar?](#)

The following table describes the main navigation bar links.

Table 26–1 Navigation Bar Link Descriptions

Link	Description
Views	Click this link to access the different views (daily, weekly, monthly, yearly, or combination) of your personal calendar and to check a resource’s availability.
Tasks	Click this link to access the Task Summary window. Use this window to view all your tasks and to access the Create Task window.
Notes	Click this link to access the Notes Summary window. Use this window to create a note, search for a note, attach a document to a note, view all notes, or view details of a particular note.

26.1.1 Calendar Rules

HTML Calendar provides the following security rules to access appointments, and an appointment’s attachments:

Security Access Appointments

- Every employee resource can use HTML Calendar.
- The owner can have full access (view, update, and delete) privilege to the appointments and the invitees can have view only access to the appointment.

- Only the owner of a calendar can grant another users an access privilege (full access or read only access) to access his or her personal calendar. However, for the private appointments, only the owner can see them even the full access privilege is granted to another users.

Security Access Appointment's Attachments

- Owner of the appointment can have full access privilege to the attached notes as well as the attachments created by him or her.
- Invitees can have full access to the attached notes as well as the attachments created by the appointment owner. In addition, invitees can also create additional notes and attachments for the appointment.
- 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.

26.1.2 Types of Calendars

The following are the different types of calendars available for viewing in Calendar.

- [Personal Calendars](#)
- [Public Calendars](#)
- [Group Calendars](#)

Personal Calendars

Every employee has a personal calendar that they use to create or view appointments, invite resources to appointments, attach notes and tasks, and relate appointments to business objects. There are several ways to view your calendar including: daily, weekly, monthly, yearly, or in combination with your assigned tasks. Other features of the personal calendar include checking a resource's availability, personalizing your calendar view, and updating and soft deleting existing appointments.

Public Calendars

Use the public calendar view to display upcoming public events. Public calendars can be accessed by all calendar users and are only available in the monthly view format. You cannot update a public calendar unless you are the owner of that calendar. You cannot create a private appointment on a public calendar.

Group Calendars

A group calendar is created specifically for tasks and appointments related to a resource group. Unlike the public calendar, which can only be viewed on the separate public calendar view, a group calendar is viewed within the user's personal calendar.

A group calendar is not accessible unless you subscribe and receive approval. You can request a new group calendar by submitting a request to the Calendar Administrator. Once the new group calendar is approved, you become the owner of that group calendar or the Group Calendar Administrator and are responsible for future subscription approvals and rejections.

It is important to note that all group calendar appointments are public to the group calendar subscribers, therefore, group calendar appointments cannot be private appointments.

26.1.3 Calendar Views

When you log onto calendar, the daily view of your calendar appears in the window. You can then view the entire day's schedule of appointments in this window. Un-timed appointments are:

- Any task that is assigned to you that does not have a start time and end time.
- Any appointment that is created without identifying its duration (not timed).

You can click on the hyperlink for the task (appointment) and be taken to the detail for that specific object. The detail window for the object depends upon the source. For example, if the source is task (object), then you are taken to the Task Details window. If you click on an item in the un-timed area where the source is appointment, then you are taken to the Appointment Detail window. The following table describes all the ways you can view your personal calendar.

Table 26–2 Calendar Views

View	Description
Daily View	Within the daily view, you can create a new appointment, update or delete an existing appointment or choose to access a different day on the calendar.
Weekly	Within the weekly view you can create a new appointment, update an existing appointment, or delete an existing appointment. You can choose to access a different week to view that week’s calendar of appointments.
Monthly	Within the monthly view you can create a new appointment, update an existing appointment, or delete an existing appointment. You can also choose to access a different month to view that month’s calendar of appointments.
Yearly	The yearly view displays all of the months for the entire year. Each month displays the days of the week starting with Sunday and ending with Saturday. The current day is highlighted within the yearly view.
Combination	In the combination view, you can maintain daily activities while avoiding scheduling conflicts by viewing the days events along side a list of current tasks. The combination view fields may vary depending on the columns you choose to display in the Task Summary window.
Availability	Within the availability view you can check the availability of multiple resources at the same time. You can also create an appointment by clicking on the time link, and invite all resources who are visibly available. Resource availability is based on appointments which appear on the resource’s personal calendar.

26.1.4 Who Uses Calendar?

Roles are assigned to resource’s to determine privileges. For example, you may have the ability to modify another resource’s calendar if you are granted full access by the owner. The following table defines each Calendar role.

Table 26–3 Calendar Roles

Role	Description
Calendar Administrator	The Calendar Administrator is responsible for creating group or public calendars based on user requests. Creation of calendars are accomplished by responding to a workflow request. Once the calendar is approved, the creator becomes the Administrator for that group calendar (Group Calendar Administrator). Requests for that group calendar are then processed by that user.
Group Calendar Administrator	The Group Calendar Administrator has all the same privileges as a regular calendar user except that they are responsible for approving and rejecting subscription requests for the group calendars they own.
Attendee	An attendee is a resource who has accepted an appointment invitation.
Invitee	An invitee is a resource who receives an invitation to an appointment but has not responded.
Owner	A calendar owner is defined as the resource who owns the personal, group, or public calendar.
Subscriber	A subscriber is an individual who requests access to a group calendar. A subscriber of a group calendar can have read-only or full access.
User	A calendar user is an employee resource who uses calendar.

26.2 Oracle Calendar Key Features

The following are key features of Calendar:

- [Managing Appointments](#)
- [Personalization and Preferences](#)

26.2.1 Managing Appointments

You can create appointments for yourself or for other resources who grant you full access privileges to their calendar. For example, Elizabeth Smith, a marketing manager at Vision Corporation, decides to target small size companies through the Vision web site. She wants to discuss campaign details with her team, so she uses the HTML Calendar to create an appointment, and subsequently, invites her team to the appointment. Her team members receive the invitation in their calendar.

In addition to creating appointments for upcoming events, you can also create an appointment for a business event that has already occurred in order to have a tracking record. For example, you attended a meeting last week to follow-up on a business event, even though this event was not originally scheduled in your calendar. You create the appointment one week after the event to record the meeting.

26.2.2 Personalization and Preferences

You can specify personal preferences for viewing your daily calendar. You can change your password, grant access privileges so others can view your calendar, request a group or public calendar, or switch to another calendar. You can also personalize the appearance of your calendar. For example, you can define what constitutes a week (Monday to Friday or, perhaps including weekends) as well as, what hours to start and end the day within the daily and weekly views. When Calendar is integrated with other Oracle products, Calendar preferences are embedded within that applications profile or preferences.

26.3 Integration with Notes and Tasks

Note: If you have integrated both Calendar and Resource Manager with another Oracle product, you see both the Calendar tab and the People tab. These two modules share the CRM Application Foundation User responsibility.

A note provides a record of descriptive information that is generated and referenced by the user. Use Notes to add additional information to an appointment. The key functionality of the Notes module includes:

- Viewing all existing notes
- Creating a note
- Attaching a document, text, or a URL to a note
- Searching for a note

Task Manager provides the capability for tasks to be created, assigned, prioritized, and managed. It provides an effective mechanism for organizations to use to respond to customers' needs in a timely manner. The key functionality of the Task Manager module includes:

- Viewing Task Information
- Searching for a Task
- Creating a Task
- Assigning individual resources to a task
- Maintaining Task Contacts

Appointments and tasks are both considered tasks. Appointments that are created in the Create Appointment window automatically show up on the user's calendar with a source of appointment.

26.4 Oracle HTML Calendar Integrations

The HTML Calendar module uses the following to provide functionality:

- Oracle HTML Task Manager to schedule appointments (tasks), create repeating appointments for meetings.
- Oracle HTML Resource Manager to invite employee resources to an appointment.
- Oracle Accounts Receivables's profile options to set the default client and server time zones for a user
- Oracle Workflow to send workflow notifications for processing new group calendar requests and subscription requests to an existing group calendar.
- HTML Tech Stack to display the HTML functionality

The HTML Calendar is widely used by the following applications across Oracle e-Business Suite:

- Sales Online uses the HTML Calendar module to schedule appointments for a lead or an opportunity, as well as to view resource availability through different calendar views.
- Marketing Online uses the HTML Calendar module to schedule appointments for marketing campaigns, as well as to view resource availability through different calendar views.

26.5 Calendar Process Flow

The following table describes the order and process of using the HTML Calendar.

Table 26–4 Calendar User Process

Steps	Description	Performed By
View your Personal Calendar	Effectively manage your daily activities, appointments, and tasks with your personal calendar.	End user
View a Public Calendar	(Optional) View or create a public calendar.	End user
View a Group Calendar	(Optional) Subscribe, view, and create a group calendar.	End user
View Resource Availability	(Optional) View the accessibility of an employee resources.	End user
Create Appointments	(Optional) Create an appointment using Calendar.	End user
Define Attendees for an Appointment	(Optional) Invite employee resources to an appointment.	End user
Add Attachments to an Appointment	(Optional) View, create, and add attachments to an appointment.	End user
Create Repeating Appointments	(Optional) Create a recurring appointment to appear on your calendar.	End user
Process Calendar Requests	Use the workflow notification window to grant or deny a group or public calendar request through Oracle Workflow.	Group Calendar Administrator
Use Tasks	(Optional) Create, edit, and view tasks using Task Manager.	End user
Use Notes	(Optional) Use Notes to view, create, and attach notes to an appointment.	End user
Customize Calendar Preferences	(Optional) Modify your calendar preferences.	End user

26.6 What's New in This Release

This release of Oracle Common Application Components has the following new features in Calendar subsequent to the 11.5.8 release:

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.

See [Defining Task Statuses and Status Transition Rules](#) section about task status transition rules in Task Manager of the *Oracle Common Application Components Implementation Guide*.

26.7 Terms and Definitions

The following table describes terms and definitions associated with Calendar.

Table 26–5 Terms and Definitions

Term	Description
Category	Use a category as a way of organizing tasks and appointments. For example, the task can be a phone call and the category could be call back customer.
OSO	This is an acronym for Oracle Sales Online.
OMO	This is an acronym for Oracle Marketing Online.
Full Access	With Full Access you can read and edit/delete the record. This access type does not include the capability of granting access to others.
Read-only	With read-only access, you can only view a record. You cannot edit or delete anything.
Source Object	This is the originator of the task, note, or appointment; for example, Sales, Service, Contracts, or Opportunity.

Table 26–5 Terms and Definitions

Term	Description
Calendar	Use Calendar to create, manage, and organize your appointments, tasks, and contacts.
Party	A party is an entity that can enter into a business relationship. Resources of type "Party" can be imported as resources from Oracle Accounts Receivables. An example of a party is a customer.
Tasks	A task is the lowest unit of work. For example, a task consists of sending an email, calling back a customer, or attending a meeting.

Overview of Using the Oracle HTML Calendar

This chapter covers the following topics:

- [Accessing the Oracle HTML Calendar Interface](#)
- [Summary of Oracle HTML Calendar Tasks](#)

27.1 Accessing the Oracle HTML Calendar Interface

Each module integrated with Calendar has an individual login. Perform the following steps to log in to Calendar.

Note:

- Click the Calendar tab to access the daily view of your calendar.
 - If you have integrated both Calendar and Resource Manager with another Oracle module, you see both the Calendar tab and the People tab. These two modules share the CRM Application Foundation User responsibility
-
-

Prerequisites

You must be an employee resource to use calendar.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the JSP login page.

Steps

1. Enter your user ID.
2. Enter your password and click **Go**.
3. Click the Calendar tab.

Your personal calendar opens to the current dates daily view.

27.2 Summary of Oracle HTML Calendar Tasks

Use Oracle HTML Calendar to perform the following types of tasks:

- Chapter 28, Viewing Your Calendar
- Chapter 29, Managing Appointments
- Chapter 30, Customizing Your Calendar Preferences
- Chapter 31, Administering Group Calendars
- Chapter 32, Palm and Outlook Synchronization

Viewing Your Calendar

This chapter covers the following topics:

- [Viewing Your Personal Calendar](#)
- [Viewing Different Dates on the Calendar](#)
- [Viewing Your Tasks and Calendar Simultaneously](#)
- [Viewing the Availability of a Resource](#)
- [Adding a New Resource to Your Availability View](#)
- [Viewing a Public Calendar](#)

28.1 Viewing Your Personal Calendar

Once log in to the HTML Calendar, you are taken to the calendar daily view with any scheduled appointments, tasks, or other calendar items, such as marketing objects. Select an appropriate link from the side navigation menu to have calendar displayed in weekly, monthly, yearly, or combination view. Clicking any arrow on any calendar view page, you can view the previous or next day, week, month, or year.

In the calendar daily view, you can view the entire day's schedule of any appointments, tasks, or other calendar items. In addition, you can create a new appointment, update or delete an existing appointment or choose to access a different day on the calendar.

Within the weekly view, you can view the entire week's schedule, create a new appointment, update an existing appointment, or delete an existing appointment for that week. In addition, you can access a different week to view the schedule for that particular week.

In the calendar monthly view, you will not only see the current month dates, but also 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 you can also see them shown in the current 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.

The calendar yearly view displays all of the months for the entire year. Each month displays the days of the week starting with Sunday and ending with Saturday. The current day is highlighted within the yearly view.

Use the combination view to have an overview of scheduled appointments for a specific day (daily view), along with a quick list of the current tasks.

Untimed Appointments

You might see untimed appointments shown in the untimed area on top of the daily, weekly and combination daily views. The untimed appointments, tasks or events appear because of the following reasons:

- Any task that is assigned to you and has zeroes for the start time and end time.
- Any appointment that is created without identifying its duration (not timed).

Note: If you have integrated both Calendar and Resource Manager with another Oracle product, you see both the Calendar tab and the People tab. These two modules share the CRM Application Foundation User responsibility.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the daily view of your Calendar.

Steps

1. Click any of the following menu items to display your calendar in the corresponding view:
 - Daily
 - Weekly
 - Monthly
 - Yearly
 - Combination
2. Click any appointment link to view the details.
3. Click **Today** to view the current date for any calendar view.
4. Click **Go To** to access the Go To window where you can select a date to view in any view format.
5. Click **Create** to access the Create Appointment window. The default date for the appointment is the current date.

See Also

- [Viewing Different Dates on the Calendar](#)
- [Viewing the Availability of a Resource](#)
- [Viewing a Public Calendar](#)

28.2 Viewing Different Dates on the Calendar

Use Calendar to view different dates on the calendar. Perform the following steps to change the current date in your personal calendar.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the daily view of your calendar.

Steps

1. Use the > and < buttons to navigate to different dates on the calendar.
2. Click on any day in the mini calendar to view that date.
3. Click **Go To** in any calendar view or click the Date on the calendar to display the dates daily view.

If you click **Go To**, the Go to Date window opens. From this window you can:

4. Select the Day you want to view.
5. Select the Month you want to view.
6. Select the Year you want to view.
7. Select the option button of the view you want to display:
 - Daily
 - Daily Combination
 - Monthly
 - Weekly
8. Click **Go** to view the option you selected.

See Also

- [Viewing Your Personal Calendar](#)
- [Viewing the Availability of a Resource](#)
- [Viewing a Public Calendar](#)

28.3 Viewing Your Tasks and Your Calendar Simultaneously

Use the combination view to create, update, or delete an existing appointment or task. Since the combination view provides an overview of a specific day's events (daily view), along with a quick list of the current tasks, you can view the following information:

- Scheduled appointments in the daily view (on the left-hand side of the window)
- List of the tasks (on the right-hand side of the window) in the Tasks region: The tasks shown here are the tasks you own or are assigned to you. The order of the list of tasks is based on the planned start date (starting with the oldest). You can

modify the number of rows displayed for the list of tasks by selecting the Profile icon and Display References link.

It is important to note that the Create or Quick Create button displayed in the Tasks region is used to create tasks, not appointments.

Note: You will not be able to view another resource's personal or group calendar in the combination view.

Perform the following steps to access your combination view.

Prerequisites

You must have a task to view.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Combination window by clicking Combination in any calendar view.

Steps

1. In the Combination window, click any appointment to display the appointment details window.
2. Click **Go To** to change the date on the calendar or use the arrow icons to navigate to different dates.
3. Click any scheduled appointment link in the Daily Calendar region to view the appointment details.
4. Click **Today** to view the current date for the combination view.
5. Click **Create** to access the Create Task window. Optionally click **Quick Create** to create a light version of a task.
6. To remove a task, select the **Remove** check box next to the task that you want to remove, and then click **Update**.
7. Click **Restore** to set the original data back after the last update.

See Also[Viewing the Task Summary](#)

28.4 Viewing the Availability of a Resource

Use the Availability window to check the availability of a resource that you want to invite to an appointment. Resource availability is based on appointments assigned directly to the resources which displays on the resource's calendar. This is not the same as the availability used in the Forms Calendar. Availability in Forms specifically indicates a resource's work shift availability.

The availability view lists the appointment schedule for both the selected resource's and the login user's calendars in a horizontal format, denoting the time unavailable in red, and the available time in blue. The combination of all the selected resources' availability is shown in the Combined row. Before inviting individual resources for an appointment, you can view resources' availability and unavailability.

Private appointments are considered as unavailable and their detailed information will not be seen by the user even granted with full access privilege. Private appointments are exclusive to the user who has created them.

Features of Resource Availability Window

You can perform the following tasks in the Availability window:

- View additional resource availability: By clicking **Add Resource**, you can add additional usernames to the availability view and then view their availability information.
- Create Appointments: You can create appointments by the following ways:
 - Click **Create Appointment**, you can directly create a new appointment. All your selected resources in this window for availability information are automatically added to the Attendees window if you create an appointment from this view.
 - After selecting different resources in the Availability window, you click the timeline hyperlink (such as 1:00 p.m.) shown in the Combined row to access the Create Appointment window. Notice that the Start Time field is displayed automatically (1:00 p.m.) and the resources that you selected in the Availability window are also automatically invited to the appointment.
- View resource availability for current date and a specific date: By clicking **Today**, you can view all the selected resource availability for the current date. By clicking appropriate arrows surrounding the day, you can move forward or

backward to compare the list of your selected resources' availability for the next or previous day.

Perform the following steps to view the availability window.

Prerequisites

The resource must be defined in the Resource Manager.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Availability window by clicking Availability in any calendar view.

Steps

1. Use the > and < buttons to navigate to different times in the graphical view of the resource's schedule.
2. (Optional) Click **Create Appointment** or click the time interval in the combined graphical view to create an appointment.
3. Click **Add Resource** to view another resource's availability.
4. Click **Today** to view all the selected resource availability for the current date.

See Also

- [Viewing Your Personal Calendar](#)
- [Viewing Different Dates on the Calendar](#)
- [Viewing a Public Calendar](#)
- [Adding a New Resource to Your Availability View](#)

28.5 Adding a New Resource to Your Availability View

Use the Availability window to add a resource's schedule to your availability view. Perform the following steps to add a new resource to your availability view.

Note: Resources added to your availability view are only present while the user is logged in. Once you log out of your calendar, any resources added to the availability view are deleted and you must add them to the window again once you log back in.

Prerequisites

A resource must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Availability window by clicking Availability in any calendar view.

Steps

1. In the Availability window, click **Add Resource**.
The Lookup window opens.
2. Click **Go** to search for a resource.
The Search and Select window opens.
 - a. Enter at least one character in the search field and click **Search**.
A list of resources appear in the window.
 - b. Select the option button of the resource name you want to add and click **Select**.
The resource name populates the text field.
3. Click **Add**.
The Resource is added to the multi-line text field.
4. Click **Apply** to add the resource to the availability window or click **Remove** to delete the resource from the multi-line text field.
The Availability window opens with the resource's availability information.

See Also

- [Viewing Different Dates on the Calendar](#)

- [Viewing the Availability of a Resource](#)
- [Viewing a Public Calendar](#)

28.6 Viewing a Public Calendar

A calendar user can view all existing public calendars. Public Calendars appear in Monthly view only. If the description information of a public calendar is very long, then you will see the information displayed in a wrapped text format.

Perform the following steps to access a Public Calendar.

Prerequisites

A resource must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Public Calendar window by clicking Public Calendar in any calendar view.

Steps

1. Enter the name of the public calendar or click **Go** to search for a public calendar.
 - a. Enter at least one character in the search field and click **Search**.

A list of calendars appear in the window.
 - b. Select the option button of the Calendar you want to view and click **Select**.

The calendar name populates the text field.
2. Select the month you want to view from the drop-down list.
3. Select the date you want to view from the drop-down list and click **View**.

The calendar appears in the window.
4. Click **Today** to return to the current month of the public calendar you are viewing.

See Also

- [Viewing Your Personal Calendar](#)

- [Viewing Different Dates on the Calendar](#)
- [Viewing the Availability of a Resource](#)

Managing Appointments

This chapter covers the following topics:

- [Using the Quick Find Search](#)
- [Viewing and Updating Appointment Details](#)
- [Creating an Appointment](#)
- [Deleting an Appointment](#)
- [Defining Attendees for an Appointment](#)
- [Receiving an Invitation](#)
- [Creating Repeating Task or Appointment](#)
- [Viewing Existing Attachments](#)
- [Adding an Attachment](#)
- [Relating Appointments to Source Objects](#)
- [Working with Bins](#)
- [Viewing Your Calendar and Appointment Bins](#)
- [Synchronizing an Appointment](#)

29.1 Using the Quick Find Search

Use the Quick Find search to find your appointments, tasks, notes, employees, and groups. Perform the following steps to execute a search.

Note: You must run the Rebuilding Intermedia Index for Task Names concurrent program periodically to see new and updated tasks, and to be able to search by task name in the quick find. Please see the *Oracle Common Application Components Implementation Guide*, Appendix B, for more information on concurrent programs.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to any Calendar window.

Steps

1. Using the Quick Find drop-down list, select search criteria:
 - Appointments
 - Task
 - Notes
 - Employees
 - Groups
2. Enter a keyword or letter (at least three characters) and click **Go**.
The Search Results window opens.
3. Click any item to display the details.

29.2 Viewing and Updating Appointment Details

Use the Appointment Details window to view details for any of your existing appointments. The appointments menu can be access in the side navigation bar once you create an appointment.

Note: Click the source number link to view the source or the name link to view the details of the record.

Perform the following steps to view the details of an appointment.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Appointment Details window by clicking on an appointment in any calendar view.

Steps

1. View and edit information in the window.
2. Click **Update** to modify the appointment or click **Restore** to reset the original values in the window.

A confirmation window opens to confirm the information was updated.

Guidelines

The following table describes links, which appear in the side navigation bar of the Appointment Details window.

Table 29–1 Appointment Details Side Navigation Bar

Link	Description
Appointment (Main)	Click this link to view the details of an appointment.
Attendees	Click this link to define attendees for an appointment.
Reference	Click this link to relate an appointment to a business object such as a marketing campaign.
Repeating	Click this link to create a recurring appointment.
Attachments	Click this link to view, create, and add attachments to an appointment.

Table 29–1 Appointment Details Side Navigation Bar

Link	Description
Notes	Click this link to add a note to an appointment.

See Also

- [Creating an Appointment](#)
- [Creating Repeating Task or Appointment](#)
- [Adding an Attachment](#)
- [Defining Attendees for an Appointment](#)
- [Relating Appointments to Source Objects](#)

29.3 Creating an Appointment

Use the Create Appointment window to create an appointment for yourself or another resource.

Be aware that if an appointment is created for a group or public calendar, then the "Private" check box is removed from the appointment creation page. Therefore, all group calendar appointments are public to all group calendar subscribers.

If an appointment is created without specifying starting time, then the appointment will be displayed in the untimed area in the calendar views.

In addition, when selecting an appointment type from the drop-down list, only the appointment types mapped to the object "Appointments" will be shown in the list. This is because HTML Calendar uses the method of mapping desired task types to the object "Appointments" to control the list of values shown in the Appointment type. However, if no task types are mapped to the object "Appointments", 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*.

In the Reference region, you can relate the appointment to a business object, such as an opportunity. Appointments do not follow the Tasks data security rules for the "Relate To" (or "Reference") list of values.

Perform the following steps to create an appointment.

Note:

- You cannot create a private appointment in association with a public or a group calendar.
 - All fields marked with an asterisk are required.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Create Appointment window by clicking the Create button in any calendar view.

Steps

1. Enter a name for the appointment.
2. The start date reflects the current date and is automatically populated. You can change the date if necessary.
3. Click the **Go** button to select the time zone where the appointment is scheduled. This overrides the client time zone set in your calendar profile.
 - a. Enter at least two characters in the search field and click **Search**.

A list of time zones appear in the window.
 - b. Select the option button of the time zone you want to define and click **Select**.

The name populates the text field.
4. Using the drop-down lists, define the following information for the appointment:
 - **Start Time:** If you accessed this window by clicking the + icon in the daily or weekly view, the default is the time you selected. If this field is left blank, then your appointment will be displayed in the untimed area in the calendar views.

- Duration: If you accessed this window by clicking the + icon in the daily or weekly view, the default is one hour.
 - (Task) Type
 - (Task) Category
 - Priority (Status)
5. Select when you want to be reminded of an appointment. Options include:
- Do Not Remind Me
 - 15 Minutes Before
 - 30 Minutes Before
 - 1 Hour Before
 - 2 Hours Before
 - 1 Day Before
 - 2 Days Before
 - 3 Days Before
 - 1 Week Before.

The default value is "Do Not Remind Me". If you choose to receive a reminder, you will receive a workflow notification in your Personal Home Page Worklist. However, You will not receive an email notification since you cannot receive both email and a notification in your Personal Home Page.

Additionally, you need to run the workflow background process JTF Task Reminders in order to receive notifications as task reminders.

6. Select the **Private** check box if this a private appointment. If the appointment is created for a group or public calendar, then you will not be able to see the **Private** check box in the creation page.
7. Use the drop-down list to select when you want to be reminded of the appointment.
8. Enter a description for the appointment.
9. Select the related business object.
- a. Use the Reference Type drop-down list to select an object to reference an appointment being created such as a person, organization, or opportunity.
 - b. Enter the related object name.

10. Click **Create** to save the current appointment and return to the Appointment Details window where you can update or delete the appointment. Click **Create and Create Another** to save the appointment and proceed to the Create Appointment window again to create another appointment.

A confirmation window opens to confirm the appointment was created successfully.

See Also

- [Viewing and Updating Appointment Details](#)
- [Creating Repeating Task or Appointment](#)
- [Adding an Attachment](#)
- [Defining Attendees for an Appointment](#)
- [Relating Appointments to Source Objects](#)
- [Creating a Note](#)

29.4 Deleting an Appointment

You can delete any of your existing appointments. Once the appointment is deleted successfully, you will receive a confirmation message displayed on the top of the calendar daily view page.

Perform the following steps to delete an appointment.

Prerequisites

An appointment must already exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Create Appointment window by clicking Appointments in any calendar view.

Steps

1. In the Create Appointment window, click **Delete** to remove the appointment from your calendar.

If you are trying to delete a repeating appointment, the Delete Appointment window opens displaying three options:

- Delete Only this Appointment
 - Delete All Appointments
 - Delete All Future Appointments
2. Select the option you want and click **Delete**.

A confirmation message displayed on the top of the calendar daily view window if the appointment is successfully deleted.

See Also

[Creating an Appointment](#)

29.5 Defining Attendees for an Appointment

Use the Attendees window to send an invitation for an appointment to another resource. Perform the following steps to invite an employee resource to an appointment.

Note:

- Click the source link to view the source or the name link to view the details of the record.
 - It is recommended that you **do not** invite attendees to public calendar appointments.
-
-

WARNING: Do not modify the assignee status of the invitee in the Forms-based version of Task Manager. Not all Task Manager assignee statuses are available in the HTML Calendar.

Prerequisites

- An appointment must already exist.
- In order for a resource to receive an email notification for an appointment invitation, the invitee must set the Issue Notification in the Calendar Personal Preferences window to Yes. This window is accessed through the Profile link.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Appointment Details window by clicking on an appointment in any calendar view.

Steps

1. Click **Attendees** in the side navigation bar.
The Attendees window opens.
2. Enter the resource name of the employee you want to invite to the appointment or click **Go** to access the lookup tool.
 - a. Enter at least one character in the search field and click **Go**.
A list of resources appear in the window.
 - b. Select the option button of the resource you want to attend the appointment and click **Select**.
The resource name populates the text field.
3. Click **Add**.
The resource name is moved to the multi-select text box. You can continue to add as many resources as necessary.
4. Select the resource and click **Remove** to delete the name from the multi-select text box.
5. Select the resource and click **Availability** to view the individual's availability for the scheduled appointment time in a graphical format.
6. Click **Send Invite**.
The resource is added to the invitees list with information regarding their status (invited, accepted, or rejected).
7. To create a note for the appointment, for any attendee to view, click the **Notes** link on the side navigation bar and click **Create Note**.
8. Select the **Remove** check box next to the employees name and click **Update** to delete them from the list.

See Also

- [Viewing and Updating Appointment Details](#)
- [Creating an Appointment](#)
- [Creating Repeating Task or Appointment](#)
- [Receiving an Invitation](#)
- [Adding an Attachment](#)
- [Relating Appointments to Source Objects](#)
- [Creating a Note](#)

29.6 Receiving an Invitation

When you receive an invitation to an appointment, it displays on your calendar with the word INVITE. Once you accept the invitation, the status changes from invitee to attendee and you are then able to attach a note to it.

For the repeating appointment or task, invitees can either reject all or accept all of them, instead of responding to each invitation individually.

WARNING: If you reject an invitation, then it will be deleted and you are not able to retrieve it.

Perform the following steps to view and respond to an invitation.

Prerequisites

An invitation must exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Appointment Invitation window by clicking on any invite that appears on your calendar.

Steps

1. Click **Accept**, to accept the invitation.

The word **Invite** disappears and a response is sent to the owner of the appointment.

2. Click **Reject**, to decline the invitation.

The link disappears completely.

3. To view any notes attached to the appointment, click the **Notes** link in the side navigation bar.

See Also

- [Creating an Appointment](#)
- [Defining Attendees for an Appointment](#)

29.7 Creating a Repeating Task or Appointment

Use the Repeating window to create a series of appointments for a regularly scheduled appointment. Perform the following steps to create a repeating appointment.

See the [Task Manager](#) documentation for information regarding Creating a Repeating Task or Appointment.

See Also

- [Viewing and Updating Appointment Details](#)
- [Creating an Appointment](#)
- [Adding an Attachment](#)
- [Defining Attendees for an Appointment](#)
- [Relating Appointments to Source Objects](#)

29.8 Viewing Existing Attachments

Use Calendar, Task, or Notes to view an existing attachment. Perform the following steps to view the attachments window.

Note:

- Click the source link to view the source or the name link to view the details of the record.
 - Use the First, Previous, Next, and Last links to view all of your existing attachments.
-
-

Prerequisites

An attachment must exist in the system.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Attachments window by clicking Attachments in the Appointment, Note, or Task Details window.

Steps

1. Click **Attachments**.
The Attachments window opens.
2. Click any attachment link to view it in the window.

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

See Also

[Adding an Attachment](#)

29.9 Adding an Attachment

Use Calendar, Tasks, or Notes to add an existing attachment to an appointment, as well as, create and add a new attachment, all from the same window. You can link unstructured data such as images, word-processing documents, spreadsheets, URLs, or text to application data.

Note: Click the source link to view the source or the name link to view the details of the record. Use the First, Previous, Next, and Last links to view all existing attachments in the system.

Perform the following steps to attach or create an attachment for a specific appointment.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Attachments window by clicking the Add Attachments button in the Appointment, Notes, or Task Details windows.

Steps

1. Click **Attachments** in the side navigation bar.
The Attachments window opens.
2. Click **Add Attachment**.
The Add Attachments window opens.
3. Enter a description for the attachment.
4. Select one of the following option buttons to define the type of attachment you want to add. The default is a File attachment.

Text: Enter the attachment text in the text field (no more than 2000 characters).

File: Enter the file name or click Browse to search for the file.

- a. From the Choose File window, navigate to the file you want to attach.
- b. Click **Open**.
- c. The File name appears in the text field.

URL: Enter the URL address.

5. Click **Create** to add the attachment to the Appointment, or click **Clear** to reset the original values in the window.

See Also

- [Viewing and Updating Appointment Details](#)
- [Creating an Appointment](#)
- [Creating Repeating Task or Appointment](#)
- [Defining Attendees for an Appointment](#)
- [Relating Appointments to Source Objects](#)

29.10 Relating Appointments to Source Objects

Use the References window to relate an appointment to a business object. For example, if an appointment relates to a specific business campaign, you can relate it to that campaign so the information appears to anyone who views the appointment.

Note: Appointments do not follow the Tasks data security rules for the "Relate To" (or "Reference") list of values.

Perform the following steps to relate an appointment to another business object.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the References window by clicking References in the Appointment Details window.

Steps

1. Select the Related Object from the drop-down list.
2. Enter the name of the business object (application) or enter at least two characters in the search field or click **Go** to access the lookup tool.

A list of business objects appear in the window.

3. Select the business object you want to reference the business object and click **Select**.

The field populates with the business object.

4. Click **Update** to add the information to the table.
5. Select the **Remove** check box next to the business object and click **Update** to delete it from the list.

The information is added to the Type and Name columns and a confirmation window opens to confirm the information was updated.

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

See Also

- [Viewing and Updating Appointment Details](#)
- [Creating an Appointment](#)
- [Creating Repeating Task or Appointment](#)
- [Adding an Attachment](#)
- [Defining Attendees for an Appointment](#)

29.11 Working with Bins

Bins provide a quick look at the current days appointments and tasks. The calendar bin shows the current calendar month, the task bin shows a modified task summary, and the appointment bin shows the current day's appointments, which appear in the daily view of your calendar. Only tasks and appointments (including task and group calendar items) to which the user has access, are shown in the task and appointment bins. The following topics provide additional information on bins:

- [Viewing Your Calendar and Appointment Bins](#)
- [Viewing the Task Bin](#)
- [Editing Your Task Bin](#)

Note: For more information regarding the implementation and customization of bins, please see the *Oracle Applications CRM System Administrator's Guide*.

29.12 Viewing Your Calendar and Appointment Bins

If you are running Calendar integrated with another Oracle module, use calendar bins as a quick look at your daily calendar and appointments.

- The calendar bin shows you the monthly view of your calendar while the appointment bin shows you all the items that appear on the daily view of your calendar including tasks and appointments.
- The appointment bin has two columns. The time column shows the start time of the appointment and the name shows the appointment name. If a start time is not specified when the appointment is created, "All Day" appears in the time column. When you create an appointment, it appears in your appointment bin for the specified day. Perform the following steps to view your calendar and appointment bins.

Note:

- When you switch to another calendar that you are subscribed or have access to, your calendar and task bins still reflect your personal appointments and tasks.
 - For information regarding the Personalize link, please see the *Oracle Applications CRM System Administrator's Guide*.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to your Homepage.

Steps

1. From the daily view of your calendar, click **Home** on the main navigation bar.
Your Personal Homepage appears containing your two calendar bins. The first bin contains a list of your appointments for the current day including the time and name.
2. In the calendar bin, click on any date, or the Today's date link, to access the daily view of your calendar.
3. In the calendar bin, you can also click on the current month or year to access the monthly view of your calendar.

In the appointment bin, click any appointment name to display the Appointment Details window or click on the current date to access the daily view of your calendar.

29.13 Synchronizing an Appointment

Oracle supports a two-way synchronization for the appointments that appear on the user's HTML Calendar. This includes appointment invitations, repeating appointments, and appointments shown from group calendar subscriptions.

Detailed information about required setup steps and synchronization process, see the following links:

- [What Is the Synchronization Process](#)
- [Required Setups and Configuration](#)
- [Terms and Definitions](#)
- [Synchronization of Appointments](#)
- [Palm and Outlook Synchronization FAQs](#)
- [Troubleshooting Tips](#)
- [Field Mappings](#)

See Also

- [Synchronization of Business Contacts](#)
- [Synchronization of Tasks](#)

Customizing Your Calendar Preferences

This chapter covers the following topics:

- [Changing Your Personal Preferences](#)
- [Defining Privileges for Your Calendar](#)
- [Working with Group Calendars](#)
- [Subscribing to a Group Calendar](#)
- [Requesting a New Group or Public Calendar](#)
- [Switching to Another Calendar](#)
- [Adding and Removing Task Categories](#)
- [Defining Your Time Zone](#)

30.1 Changing Your Personal Preferences

Use Calendar preferences to control the way that you view your calendar. Besides selecting appropriate weekly start and end hour, such as each week begins on Monday at 08:00 a.m. and ends on Friday at 05:00 p.m., you can also set the calendar display hour intervals of 12 or 24 hours.

In addition, HTML Calendar allows you to choose different color and prefix for the appointments, tasks, and other calendar events that you wish to have them displayed in your personal calendar. Therefore, it is easier for you to differentiate tasks from appointments in your calendar views. This functionality is similar to the Group Calendar Subscription page to have different color or prefix selected for your subscribed group calendar events. There will be no default text for prefix. Each prefix can have up to 20 characters.

In addition to having "Display Items" set to yes and identifying desired color and prefix text, to be able to view calendar events in your personal calendars, you must belong to resource groups to which the event is published.

How to implement calendar events, see *Oracle Common Application Components Implementation Guide* for details.

Perform the following steps to modify your personal preferences.

Note:

- Selecting No for email notifications overwrites sending an email to an invitee and the invitation only appears on the resource's calendar.
 - For more information regarding the Preferences and Personal Profile links accessed through the profile icon, please see the *Oracle Applications CRM System Administrator's Guide*.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** link.

Steps

1. Select your personal preferences:
 - Select whether or not you want an email notification sent to the attendees when you send an invitation to an appointment. The default is set to Yes.
 - Select whether or not you want to show the calendar items in your personal calendar.
 - Select if you want your clock to display in intervals of 12 or 24 hours.
2. Select your desired color and prefix information for appointments, tasks, and other calendar items that you wish to display in your personal calendar. For example, if green is chosen for tasks and with prefix "Task", then all tasks will

be displayed in green and have prefix "Task" in front of each task name in your calendar views. This way you can easily differentiate tasks from appointments if they are in red with prefix "Apt".

3. Select calendar display preferences:
 - Select what order you want the weeks on your calendar for the Weekly view to begin and end. For example, Sunday through Saturday or Monday through Friday.
 - Select the way you want your appointment time increments to display. For example, 15 minute or 30 minute increments.
 - Select the start time and end time you want to display on your calendar for each day of the week.
4. Click **Update** when you are done modifying your preferences.

See Also

- [Subscribing to a Group Calendar](#)
- [Requesting a New Group Calendar](#)
- [Switching to Another Calendar](#)
- [Adding and Removing Task Categories](#)
- [Defining Privileges for Your Calendar](#)
- [Defining Your Time Zone](#)

30.2 Defining Privileges for Your Calendar

Use Calendar privileges to grant another user view only or full access to your personal calendar.

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.

See [Customizing HTML Task Security](#) chapter in *Oracle Common Application Components Implementation Guide* about customizing task security.

Perform the following steps to set calendar privileges.

Note:

- For more information regarding the Preferences and Personal Profile links access through the profile icon, please see the *Oracle Applications CRM System Administrator's Guide*.
 - If you have a private appointment, only you are able to view it. Even if you grant privileges to a user to view your calendar, the appointment remains private.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** link.

Steps

1. Click **Privileges** in the side navigation bar.

The Privileges window opens.

2. Enter the user name in the text field next to the access you wish to grant (view only or full access) or click **Go** to search for a user.

The Lookup window opens.

- a. Enter at least one character for the search criteria and click **Go**.

A list of resources appears in the window.

- b. Select the option button of the resource you want to grant privileges to and click **Select**.

The user name populates the text field.

3. Click **Add** to add the user name to the multi-line text field and click **Update**.

See Also

- [Subscribing to a Group Calendar](#)
- [Requesting a New Group Calendar](#)
- [Switching to Another Calendar](#)
- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)
- [Defining Your Time Zone](#)

30.3 Working with Group Calendars

See the following sections to subscribe to or request a new group calendar.

- [Requesting a New Group Calendar](#)
- [Subscribing to a Group Calendar](#)

The Calendar Administrator, but not any other users, can also see an additional drop-down menu shown in the Group Calendar Subscription window to view group calendar subscription information.

- [Viewing Group Calendar Subscription Information](#)

30.4 Requesting a New Group or Public Calendar

When you request a new group or public calendar, the request is sent to the Calendar System Administrator for approval. Once approved, a workflow process is started and the calendar is created automatically. If you are requesting a group calendar, you receive a notification and become the owner of the group calendar, which entitles you to administer future subscription requests to that calendar. Any subsequent subscription requests are then sent directly to your worklist for your approval. Perform the following steps to request creation of a new group calendar.

Note:

- You cannot create a private appointment in association with a public calendar.
 - For more information regarding the Preferences and Personal Profile links accessed through the profile icon, please see the *Oracle Applications CRM System Administrator's Guide*.
-
-

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** link.

Steps

1. Click **Group Calendar** in the side navigation bar.
The Group Subscription window opens.
2. Click **Request New Group**.
The Request New Group window opens.
3. Enter a name for the group.
4. Enter a description for the group. If the description is a very long text, then it can be displayed in a wrapped text format.
5. Select the **Public** check box if you are requesting a public calendar.
6. Click **Send Request**.

A workflow notification is sent to the Group Calendar Administrator who determines whether or not the request is approved.

See Also

- [Subscribing to a Group Calendar](#)
- [Switching to Another Calendar](#)
- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)
- [Defining Privileges for Your Calendar](#)
- [Defining Your Time Zone](#)

30.5 Subscribing to a Group Calendar

A calendar user can subscribe to a group calendar. If your subscription request is approved by the group calendar owner, the group calendar appears in the Calendar Group Subscription window the next time you access it. The group calendar then appears in your personal calendar. Only the Group Calendar Administrator, or a calendar user granted full access to the calendar, can modify it. Perform the following steps to gain access to a group calendar.

Note: For more information regarding the Preferences and Personal Profile links accessed through the profile icon, please see the *Oracle Applications CRM System Administrator's Guide*.

Prerequisites

A group calendar must exist.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** link.

Steps

1. Click **Group Calendar** in the side navigation bar.

The Group Subscription window opens displaying all group calendar you are currently subscribed to.

2. Click **Subscribe to Group**.

The Subscribe to Group Calendar window opens.

3. Enter the name of the group calendar you want to subscribe to or click **Go** to search for a group.

- a. Enter at least one character in the search field and click **Go**.

A list of calendars appear in the window.

- b. Select the option button of the calendar you want to add and click **Select**.

The Group Name and Group Description fields information populates the corresponding fields.

4. Using the drop-down list, select which color you want the group to display in your calendar.
5. Enter the prefix for the group calendar items.
6. Click **Subscribe**.

The group calendar subscription confirmation window opens confirming that your subscription has been submitted.
7. Click **Back** to return to the Group Calendar Subscription window.

The workflow notification is sent to the Calendar Group Administrator.

See Also

- [Requesting a New Group Calendar](#)
- [Switching to Another Calendar](#)
- [Updating Group Calendar Subscription Information](#)
- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)
- [Defining Privileges for Your Calendar](#)
- [Defining Your Time Zone](#)

30.6 Switching to Another Calendar

Use the Switch to Another Calendar window to view a group calendar that you own or to view another user's personal calendar if you have been granted access privileges.

For example, Paul Henry can select the Key Accounts group calendar after he receives approval from Timothy Cleary, the owner of the Key Accounts group calendar. If Paul is an assistant for Elizabeth Smith, a sales director, and has view-only access privilege to Elizabeth's personal calendar, then Paul can also see Elizabeth's name shown in the User or Group Name field's drop-down list. He can switch to Elizabeth's personal calendar and view her schedule if needed, but cannot make updates, or add new appointments.

Timothy, the owner of the Key Account group calendar, can select the Key Account group calendar if he wants to create or update activities. Paul is not able to select the Key Account group calendar because Paul is not the owner of that group calendar.

It is important to note that when you switch a calendar, you can still see your tasks and notes by navigating to the Tasks or Notes subtab. With in this context if you come back to the Views subtab, you are still in the switch calendar mode. To switch back to your personal calendar, you need to go to switch calendar and switch back.

Access to appointments is based on whether you are the owner of the appointment or an attendee. For example, when you search a note whose source is an appointment, you can drill down to the appointment only if you are the owner or the attendee of that appointment. Otherwise, you cannot drill down to the appointment.

Access to calendars and the ability to view the associated contents kick in only when you switch calendar and not in any other context. Perform the following steps to switch to another calendar view.

Note: For more information regarding the Preferences and Personal Profile links accessed through the profile icon, please see the *Oracle Applications CRM System Administrator's Guide*.

Prerequisites

You must own or have access to another calendar.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** link in the upper right corner of the UI.

Steps

1. Click **Switch Calendar** in the side navigation bar.

The Switch to Another Calendar window opens.

2. Select to view another calendar you own or have access to from the drop-down list. The list of values contain only those calendars that the user owns or have access granted to. The default calendar is the user's personal calendar.

3. Click **Switch Calendar**.

The new calendar opens in the daily view.

See Also

- [Subscribing to a Group Calendar](#)
- [Requesting a New Group Calendar](#)
- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)
- [Defining Privileges for Your Calendar](#)
- [Defining Your Time Zone](#)

30.7 Adding and Removing Task Categories

Use Calendar to create personalized task categories to classify your appointments or tasks.

Note:

- The default category "Unfiled" exists for all users and cannot be deleted.
 - For more information regarding the Preferences and Personal Profile links accessed through the profile icon, please see the *Oracle Applications CRM System Administrator's Guide*.
-
-

Perform the following steps to create a new task category.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** link.

Steps

1. Click **Categories** in the side navigation bar.
The Categories window opens.

2. Enter a name for the category into a blank field under the category column.
3. Select the **Remove** check box next to the category and click **Update** to delete it.
4. Click **Update** to save your changes or click **Restore** to revert back to the original information after your last update.

See Also

- [Subscribing to a Group Calendar](#)
- [Requesting a New Group Calendar](#)
- [Switching to Another Calendar](#)
- [Changing Your Personal Preferences](#)
- [Defining Privileges for Your Calendar](#)
- [Defining Your Time Zone](#)

30.8 Defining Your Time Zone

Use the time zone window to determine what time zone your appointments take place in when you are creating an appointment. Perform the following steps to change your time zone information for Calendar and all integrated Oracle Products.

Note: For more information regarding the Preferences and Personal Profile links accessed through the profile icon, please see the *Oracle Applications CRM System Administrator's Guide*.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** link.

Steps

1. Click **Time Zone** in the side navigation bar.

The User Time Zone window opens.

2. Click the **Go** button to select the time zone you want to specify as your default.
3. Enter at least two characters in the search field and click **Search**.

A list of time zones appear in the window.

4. Select the option button of the time zone you want to define and click **Select**.

The name populates the text field.

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

See Also

- [Subscribing to a Group Calendar](#)
- [Requesting a New Group Calendar](#)
- [Switching to Another Calendar](#)
- [Changing Your Personal Preferences](#)
- [Defining Privileges for Your Calendar](#)
- [Adding and Removing Task Categories](#)

Administering Group Calendars

This chapter covers the following topics:

- [Viewing and Approving New Group Calendar Requests](#)
- [Viewing and Approving Subscription Requests](#)
- [Viewing Group Calendar Subscription Information](#)
- [Updating Group Calendar Subscription Information](#)

31.1 Viewing and Approving New Group Calendar Requests

Note: The following procedure must be done in Forms.

The Calendar Administrator can approve or reject a new group calendar request. Whether or not the group calendar request is granted or rejected, the group calendar requestor receives a notification. If the request is approved, the requestor automatically becomes the owner of the group calendar, the Group Calendar Administrator, and is then responsible for approving future subscription requests for that group calendar. Perform the following steps to approve a group calendar request.

Note: If you are running Calendar integrated with Oracle Sales Online (OSO), you are able to view notifications from your worklist in HTML.

Prerequisites

- You must configure your Personal Home Page (PHP) and create a worklist to receive notifications.
- The user must be a Calendar Administrator. See [Creating a Calendar Administrator](#) section of the *Oracle Common Application Components Implementation Guide* for details.

Responsibility

System Administrator

CRM Application Foundation User (or the JTF HTML Calendar User)

Workflow User Web Application

Preferences

Navigation

Navigate to your homepage worklist in Forms.

Steps

1. Click on any request link.
The Notification Details window opens.
2. Review the request.
3. In the lower portion of the window, select **No** in the response drop-down list if you want to deny the request, or select **Yes** to accept it.
4. Click the corresponding button to approve or deny the request.

See Also

- [Viewing and Approving Subscription Requests](#)
- [Viewing Group Calendar Subscription Information](#)
- [Updating Group Calendar Subscription Information](#)

31.2 Viewing and Approving Subscription Requests

Note: The following procedure must be done inForms.

When you receive an approval for a new group calendar, you become the owner of that calendar and are responsible for responding to all future subscription requests. Perform the following steps to respond to a request to subscribe to your group calendar.

Prerequisites

You must configure your Personal Home Page (PHP) and create a worklist to receive notifications.

The user must be a Group Calendar Administrator who has the administrator access privileges

Responsibility

CRM Application Foundation User

JTF HTML Calendar User

Navigation

Navigate to your homepage worklist in Forms.

Steps

1. Click on any request link.
The Notification Details window opens.
2. Review the request.
3. In the lower portion of the window, select read-only access from the Response drop-down list and click **Approve**, to grant the request, or click **Reject**, to deny it.
4. Click the corresponding button to approve or deny the request.
Your worklist reappears in the window.

See Also

- [Viewing and Approving New Group Calendar Requests](#)
- [Viewing Group Calendar Subscription Information](#)
- [Updating Group Calendar Subscription Information](#)

31.3 Viewing Group Calendar Subscription Information

In order to be able to review group calendar subscription information, the Calendar Administrator, but not any other users, can see an additional drop-down menu, besides the **Request New Group** and **Subscribe to Group** buttons, with the following choices listed in the Calendar Group Subscription window:

- Show Subscribed (Default)
- Show All

The default for the drop-down menu is Show Subscribed. This lists the group calendars that HTML Calendar Administrator is currently subscribed to. The Calendar Group Subscription window appears with Group Calendar Name, Description, Color, and Prefix information. If Show All is selected, then all group calendar's names and descriptions will be shown in the Calendar Group Subscription window.

Prerequisites

You must be the Calendar Administrator. See [Creating a Calendar Administrator](#) for more information on defining user roles.

Responsibility

System Administrator

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** icon.

Steps

1. In the Calendar Personal Preferences window, click **Group Calendar** in the side navigation bar.

The Calendar Group Subscription window opens with Show Subscribed selected in the drop-down menu next to the **Subscribe to Group** button.
2. Review the group calendar information that HTML Calendar Administrator has subscribed to in the Calendar Group Subscription window.
3. (Optionally) select Show All from the drop-down list to review all group calendars.

See Also

- [Viewing and Approving New Group Calendar Requests](#)
- [Viewing and Approving Subscription Requests](#)
- [Updating Group Calendar Subscription Information](#)

31.4 Updating Group Calendar Subscription Information

After approvals from the Calendar Administrator for a new group calendar request or from the Group Calendar Administrator for a subscription request, any users can update their subscribed group calendars shown in the Calendar Group Subscription window.

However, the level of calendar updates is based on the user types. An average user who is neither a Calendar Administrator nor a Group Calendar Administrator can have basic group calendar subscription updates. A user who is a Calendar Administrator or a Group Calendar Administrator can further update the list of Group Calendar Administrators (owners) shown in a table format for a selected group calendar besides the basic updates.

Basic Group Calendar Subscription Updates

After opening the subscribed group calendar, a user can modify the subscription information by changing the color and prefix event title information for the selected group calendar. Click **Update** to save the changes. The Color and Prefix Event Title fields are used to differentiate which activities displayed in your personal calendar belong to the subscribed group calendar. Additionally, click **Unsubscribe** to revoke the selected group calendar subscription.

It is important to note that there is also a table listing all the Group Calendar Administrators for the selected group calendar. However, an average user cannot modify any of them. All the information in this table is read only.

Add or Remove Group Calendar Administrators

Besides the basic group calendar updates, a user who is a Calendar Administrator or a Group Calendar Administrator can see an extra Remove check box shown in the table next to the Name field if the administrator has been identified. A user with administrator role can add more Group Calendar Administrators from the Name LOV if necessary. Any changes made to the administrators will be confirmed by a message indicating your update is successful.

Note: each group calendar must have at least one Group Calendar Administrator.

Before removing existing administrators, you must make sure that each group calendar must have at least one Group Calendar Administrator listed in the table. Otherwise, an error message pops up, "You have to select a new group calendar administrator before you remove all of the existing ones!" If a duplicate name (administrator) is selected, then an error message also pops up, "The resource you selected is already a group calendar administrator."

After you update the administrators, if a group calendar has more than one Group Calendar Administrator, then a subscriber's request will be sent to all of the Group Calendar Administrators. However, the access privilege of the subscriber to the group calendar is based on the level granted by the first approver. For example, if one of them approves the request and grants the subscriber an access level, such as Read, the system will ignore the approvals from other administrators. This means that even if another administrator grants the subscriber Full Access later, the access level for the subscriber is still Read.

Tips: Although you can have more than one Group Calendar Administrator for a group calendar, for the backup purposes, it is suggested that grant only one additional user the Administrator access. Users who have the administrator access privileges become the Group Calendar Administrators. Do not have too many Group Calendar Administrators for the same group calendar.

While responding to the group calendar subscription requests, the Group Calendar Administrator can grant the Full Access to the user who needs to create or update the group calendar's appointments, or the Administrator access to the user who acts as the Group Calendar Administrator. Otherwise, the administrator should always grant the Read Only access to the rest of subscribers.

Prerequisites

Users with the administrator role (a Calendar Administrator or a Group Calendar Administrator) can update administrators for a given group calendar.

Responsibility

CRM Application Foundation User

JTF HTML Calendar User

Navigation

Navigate to the Calendar Personal Preferences window by clicking the **Profile** icon.

Steps

1. In the Calendar Personal Preferences window, click **Group Calendar** in the side navigation bar.

The Calendar Group Subscription window opens with a list of your subscribed group calendars.

2. Click the group calendar name to open the Group Calendar Subscription Update window.
3. To update the group calendar subscription information:
 - a. Change the color and prefix event title information for the selected group calendar.
 - b. Click **Update** to save the changes.
4. To unsubscribe the selected group calendar, click **Unsubscribe** to revoke the subscription.
5. To update the administrators if you are a Calendar Administrator or a Group Calendar Administrator:
 - a. Select the Remove check box next to the administrator whom you want to remove.
 - b. Use the Name LOV and click **Go** to retrieve the administrator whom you want to add to the calendar.
 - c. Click the **Update** to save the changes.

See Also

- [Viewing and Approving New Group Calendar Requests](#)
- [Viewing and Approving Subscription Requests](#)
- [Viewing Group Calendar Subscription Information](#)

Palm and Outlook Synchronization

This chapter covers the following topics:

- [What Is the Synchronization Process](#)
- [Required Setups and Configuration](#)
- [Terms and Definitions](#)
- [Synchronization of Appointments](#)
- [Synchronization of Tasks](#)
- [Synchronization of Business Contacts](#)
- [Palm and Outlook Synchronization FAQs](#)
- [Troubleshooting Tips](#)
- [Field Mappings](#)

32.1 What Is the Synchronization Process

Synchronization is a process by which information that you enter once, in either Oracle Common Application Components or your offline device, will be immediately available in both places.

Through our partner, Pumatech Inc.'s "Intellisync® for Oracle", Oracle provides a two-way synchronization process for uploading and downloading critical business and personal data between Oracle applications and the offline device (a Palm or Outlook) connected to the user's personal computer.

Note: An offline device refers to where data will be seen and maintained outside the Oracle e-Business Suite through the usage of Intellisync software. However, an offline device in this release is synonymous to either Palm OS or Microsoft Outlook.

The information supported for the synchronization includes the appointments, tasks, and Trading Community Architecture (TCA) business contacts available to the logged-in user based on Oracle Sales Online security.

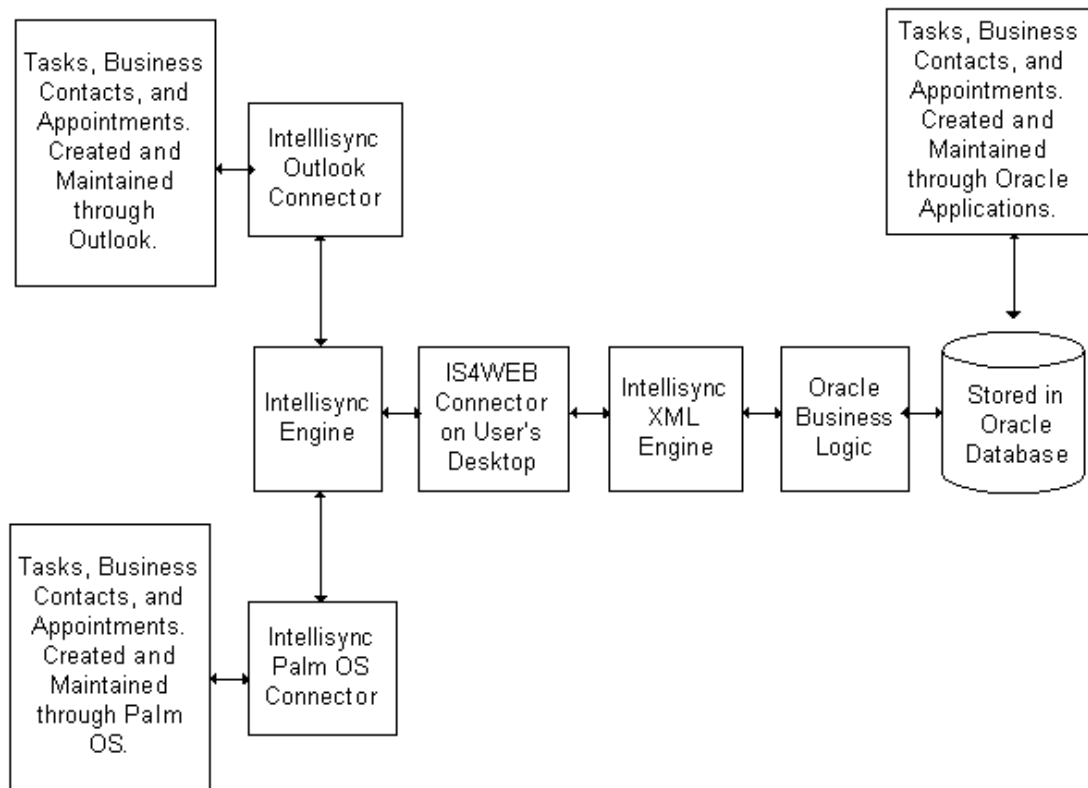
Once the synchronization process is triggered, Oracle applications retrieve the records to be synchronized based upon certain business rules for each area (business contacts, appointments, and tasks). These records are then passed through the Intellisync engines and software on the user's desktop. Finally, Intellisync passes the data to the corresponding connector chosen by the user (Microsoft Outlook or Palm OS), creating and updating the data in those applications accordingly. The process functions in reverse, gathering any new information created, updated or deleted since the last synchronization on the offline device and passing this data back to be handled by the Oracle business rules for each area (business contacts, appointments, and tasks).

During the synchronization process, the Intellisync software provides the user with detailed information on how many records can be synchronized after the last synchronization. The user can have an option to view the details of those records or to cancel the synchronization process.

Note: Oracle applications do not certify synchronizations to the Palm Pilot Desktop. Synchronizations from the Palm Pilot Organizer and the Palm Pilot Desktop must be handled using the Palm Pilot synchronization software.

Please note that the synchronization process supports the Oracle Sales Online customers as well as existing Oracle Sales Online hosted customers.

The following diagram illustrates the functional flow of the synchronization process:

Figure 32-1 Synchronization Process Functional Flow

32.2 Required Setup and Configuration

Before starting the synchronization process, you need to download and install the Intellisync Client software and configuration file from the Pumatech Inc.'s web site (<http://www.pumatech.com>) and put them in the same directory.

Warning: Users should not modify the Config file (DCSSettings.cfg) while trying to configure the system. The Config file can only be modified by System Administrator.

After installation, you should see an Intellisync icon on the desktop. Click on the icon to open the main banner window.

Click **Setup** to try to log on to the configuration settings page and further identify configuration details.

You must complete the following steps prior to synchronization:

- Required Setups
- (Optional) Advanced Setups

Once the setups are complete, you can initiate a synchronization of the data chosen and start the synchronization process.

32.2.1 Required Setups

After clicking **Setup**, you are directed to the configuration settings window where you can enter Oracle application login information to connect to the Oracle server. This login information is required so that you can connect to Oracle applications.

You must complete the following steps before starting synchronization:

1. Specify your Oracle application login information in the configuration settings window:
 - a. Enter the company name.
 - b. Enter the username in the User ID field.
 - c. Enter the password in the Password field.
 - d. Enter the server address in the Server Address field.

For example, enter "http://your_address.com:your_port_number/oa_servlets/oracle.apps.jtf.sync.common.SyncServlet"

 - Replace "your_address.com" with the right URL.
 - Replace "your_port_number" with the right port number.
 - e. If you are using secured server connection, click on proxy server settings button and click intellisync help button for setting up details.
2. Identify which conduit (Palm Pilot Organizer or Microsoft Outlook) you use for synchronization, and what items (appointments, tasks, and contacts) are to be synchronized by using the following steps:
 - a. Click **Configure Applications**.

- [Synchronization Conflict Resolution Rules](#)
- [Synchronization Confirmation Messages](#)

Synchronization Data Options

Users can determine what amount of data will be synchronized based on the following sets of options provided by the Intellisync software:

- Appointments:
 - Transfer all scheduled items (Default)
 - Transfer only future items
 - Transfer items within a range of days
 - * Days prior to today
 - * Days after today
- Tasks
 - Transfer all items (Default)
 - Transfer only pending items (e.g., not completed To Dos or tasks)
- Business Contacts: Intellisync does not provide options for business contacts.

Synchronization Filters

With the Intellisync software, users can create custom filters for additional constraints on the synchronized data. This restricts the scope of the data that will be synchronized using advanced filters. Filters can be constructed separately for the individual functional areas (appointments, tasks, and business contacts).

For example, use the Exclude Private Data filter to filter out personal tasks or appointments upon synchronization.

Intellisync does not provide any defaulted filters currently.

Synchronization Conflict Resolution Rules

The Intellisync software product provides rules that govern how data conflicts are handled during the synchronization process. The rules can be determined separately for the individual functional areas (appointments, tasks, and business contacts). However, the list of available options and defaults are the same.

- Add all conflicting items

- Ignore all conflicting items
- Notify me when conflicts occur (Default)
- Oracle wins
- Palm or Microsoft Outlook wins

Synchronization Confirmation Messages

The Intellisync software product provides an option to allow the user to request a confirmation dialog when the actual records are synchronized. The confirmation options can be determined separately for the individual functional areas (appointments, tasks, and business contacts). However, the list of available options and defaults are the same.

- Confirm record deletions
- Confirm record changes and additions

The default value is to have both of these items selected.

32.3 Terms and Definitions

The following table provides terms and definitions associated with the synchronization process:

Table 32–1 Synchronization Terms and Definitions

Term	Definition
PIM – Personal Information Manager	A program or device that manages information locally (PDA or laptop) for an individual user.
Intellisync	Provided by Pumatech Inc., "Intellisync® for Oracle" is a service that Oracle will utilize to allow users to sync from the Oracle applications to their Palm OS or to Microsoft Outlook.
Party	An entity that can enter into a business relationship and can be of the four types: Person, Organization, Group, and Relationship. An alternate description is any entity that can be assigned to a CUSTOMER ACCOUNT. Parties can be individual persons or organizations like companies.
Task	A task is the lowest unit of work. A task must have an owner and can have any number of assignees. A task can be owned by an individual or a group.

Table 32–1 Synchronization Terms and Definitions

Term	Definition
To Do	A To Do is a Palm specific term. Oracle Common Application Components interpret this term, for the purpose of synchronizing, as a task that is assigned to no one and is owned by the creator.
Appointment	An appointment is a task that is associated with a start time and end time and that has a source of appointment in the Oracle Common Application Components framework.
Business Contact	A business contact is defined as being a party of type relationship where the subject of the relationship is a party of type person and the object of the relationship is a party of type organization. The relationship code must be equal to "contact of".
Offline Device	An offline device refers to where data will be seen/maintained outside the eBusiness Suite through the usage of Intellisync software. For this release an offline device is synonymous to either Palm or Microsoft Outlook.
OSO	OSO stands for Oracle Sales Online and is a product, part of 11i, that currently has screens to maintain organizations, persons, and any (business) contact relationships for those persons or organizations.
TCA	TCA stands for Oracle Trading Community Architecture that holds the actual physical schema used to store Customers and other trading partners in the eBusiness suite.
Download	Download refers to the direction of the synchronization process. For download the data is being copied from the Oracle applications and synchronized down to the offline devices.
Upload	Upload refers to the direction of the synchronization process. For upload the data is being copied from the offline devices and synchronized up to the Oracle applications.
Repeating Series	Repeating Series is a group of appointments bound by the rule which states the occurrence pattern of the appointment. For example, a meeting can happen on every Monday from 1st Jan. to 1st Dec. 2002.
Exclusion List	Exclusion list is the list of dates for a given repeating series when the appointment will NOT occur. For example, a meeting can happen on 4th of every month. However if the appointment does not occur on the 4th July and 4th Dec., then these dates together form the exclusion list.

32.4 Synchronization of Appointments

Oracle supports two-way synchronization for the appointments that appear on the user's HTML Calendar. This includes appointment invitations, repeating appointments, and appointments shown from group calendar subscriptions.

The synchronization process for appointments covers the following topics:

- [Synchronization Business Rules](#)
- [Synchronization Scenarios](#)
- [Synchronization Methods](#)

32.4.1 Synchronization Business Rules

In general, the business rule for appointment synchronization is that the appointments that appear on the user's HTML Calendar Daily View will be synchronized to the offline devices as appointments. However, there are two exceptions to this rule:

Exceptions

- Tasks that appear on the user's HTML Calendar Daily view will be synchronized to the offline devices as tasks. Therefore, the user will not be able to view these items on their offline device in the appointment/calendar area. However, the user can view those tasks in the offline device in the task/to do areas. See [Synchronization of Tasks](#) for details.
- The appointments of others to which the current logged-in user has access, will not be synchronized to the offline device.

For example, a sales representative, Sally Smith, has access to fellow teammate Raul Sanchez's calendar. When Sally synchronizes her appointments, she will not receive any of Raul's appointments on her offline devices.

How to grant another user view only or full access to your personal calendar. See [Defining Privileges for Your Calendar](#) for details.

32.4.2 Synchronization Scenarios

Users can synchronize appointments between Oracle applications and an offline device for various reasons. Typical scenarios are the creation or modification of an appointment from the offline device.

For example, while on the road meeting with a client, a sales representative creates a one-hour appointment for the following week to meet with the client on the Palm. Upon returning to the office, the representative synchronizes data with Oracle applications. The synchronization process completes successfully and the appointment created on the Palm now exists on sales representative's HTML Calendar.

Another example can be due to the appointment updates. A sales representative downloads her appointments to Microsoft Outlook before she leaves for a series of business meetings. While attending the meetings, the sales representative moves her 3 pm meeting to 5 pm and schedules a new 3 pm meeting with a potential client. Upon returning to the office, she connects with Oracle applications and synchronizes her data with Microsoft Outlook. Navigating to the daily view, she confirms that the original 3 pm appointment has been moved to 5 pm, and the new 3 pm appointment has been created successfully.

In addition, synchronization for appointments can happen for the following reasons:

- Creation of new appointments from either the Palm or Microsoft Outlook.
- Updating existing appointments from either the Palm or Microsoft Outlook.
- Deleting existing appointments from either the Palm or Microsoft Outlook.
- Supporting repeating functionality for appointments as part of the two-way synchronization.
- Accepting or rejecting appointment invitations from either the Palm or Microsoft Outlook.

32.4.3 Synchronization Methods

The appointment synchronization between Oracle applications and an offline device can be achieved by the following two ways:

- [Downloading the Appointments to the Offline Devices](#)
- [Uploading the Appointments from the Offline Devices](#)

32.4.3.1 Downloading the Appointments to the Offline Devices

Downloading appointments to the offline device is based upon the user's login information. In other words, the appointments appearing on your HTML Calendar can be automatically included for download. This includes appointment invitations,

group calendar appointments, and the repeating frequency and series of repeating appointments can be downloaded to the offline device.

Note: Tasks that appear on the logged-in user's HTML Calendar will not be selected for the appointment synchronization. These tasks will be included in the task synchronization.

Note the following information to further understand the synchronization process:

Appointment Invitation: Appointment invitations can be synchronized to the offline devices. Therefore, users can see "INVITE:" precede with the appointment name in their offline devices. They can either accept or reject the invitation in their offline device prior to next synchronization.

To accept the invitation in the offline device, users can remove the prefix "INVITE:" from the appointment name. To reject the invitation, simply delete the appointment from their offline device.

Appointment Category: For appointment categories that exist in both the offline device and the HTML Calendar, upon synchronization, the category should be downloaded to the offline device. If a user creates an appointment in the HTML Calendar with a category even it does not exist in the offline device, after synchronization, the category will still be created in the offline device.

Time Zone: While creating appointments in the HTML Calendar, a user can specify specific time zone information for a particular appointment. For example, you can have the time zone preference set to Pacific Standard Time (PST), but create an appointment in the HTML Calendar at 2:00 pm Eastern Standard Time (EST). Oracle applications can interpret the time zone information and display the appointment in your calendar daily view at 11:00 am PST.

However, in the offline devices, users do not specify a time zone, but rather set their local time. Upon synchronization of this appointment, the user should see the appointment created in the offline device at 11:00 am PST.

In addition, appointment reminders, private appointments, and un-timed (all-day) appointments can also be downloaded to the offline device.

See Also

- [Changing Your Personal Preferences](#)
- [Receiving an Invitation](#)

- [Adding and Removing Task Categories](#)
- [Defining Your Time Zone](#)

32.4.3.2 Uploading the Appointments from the Offline Devices

Users can upload the appointments created in the offline devices to the HTML Calendar. Note the following information to further understand the synchronization process:

Appointment Name: In Microsoft Outlook, the user can create an appointment without specifying a title (appointment name). In the HTML Calendar, Oracle requires an appointment name. Therefore, an appointment created without an appointment name in the offline device will not be uploaded to Oracle applications. All other appointments created in the offline device will be supported for synchronization. This includes appointments that are created with an appointment name "_".

Additionally, the appointment name field in Microsoft Outlook is 255 characters. However, the appointment name field in the HTML Calendar is 80 characters. If the user has entered an appointment name in the offline device that is greater than the 80 characters supported in the HTML Calendar, then Oracle will truncate the appointment name to the first 80 characters.

Appointment Invitation: As mentioned earlier, appointment invitations can be synchronized to the offline devices. If a user rejects or accepts any appointments in the offline device, after synchronization, the accepted appointments in the offline device will have the Accepted attendee status shown in the HTML Calendar. Meanwhile, the rejected appointments will be removed from the HTML Calendar, and the user will not be able to find them.

Group Calendar Appointment: Group calendar appointments can be downloaded to the offline devices. However, updates made to a group calendar appointment in the offline device will not be synchronized to the HTML Calendar, regardless of whether the user is the group calendar owner.

Appointment Category: For categories that exist in both the offline device and the HTML Calendar, upon synchronization, the category will be uploaded to the HTML Calendar. If the user creates an appointment in the offline device with a category that does not exist in the HTML Calendar, upon synchronization, the category specified on the offline device will be automatically created for the user in their personal preferences. The appointment will be created or updated with this new category in the HTML Calendar.

For appointments created or updated in Microsoft Outlook with multiple categories, then only the first category listed in an alphabetical order will be synchronized.

Repeating Appointments: Repeating appointments created or updated in the offline device can be uploaded to the HTML Calendar with the same repeating frequency as specified in the offline device.

Time Zone: The time information for an appointment created in the offline device will be converted to GMT first, and then be translated to the server time zone stored in Oracle database. At the end, the time information displayed in the HTML Calendar (or in the Task Manager for a task) is interpreted based on the client or user time zone specified in the HTML Calendar's user preferences.

For example, a user creates an appointment at 2:00 pm PST in the offline device. After synchronization, the appointment will also be shown at 2:00 pm PST in the HTML Calendar if American_Los/Angeles is the default user time zone set in the user preferences page.

Appointment Reminder: Appointment reminders can be uploaded to the HTML Calendar if the reminder increment is supported both in Oracle applications and the offline device. If reminder increments (such as "remind me 10 minutes before") supported in the offline devices, but not in Oracle applications, then this reminder can not be synchronized to the Oracle applications. It is important to note that the reminder in the HTML Calendar should be set to "Do not remind me".

Appointment Priority: Appointment priorities in the HTML Calendar module are converted to the offline device based on the corresponding values in the Importance field of the priority setup page.

Private Appointment: Private appointments created or updated in the offline device can be uploaded to the HTML Calendar with the private check box selected.

Un-timed Appointment: An appointment which does not have start date and end date specified is considered an un-timed appointment.

Un-timed (all-day) appointments created or updated in the offline device can be uploaded to the HTML Calendar. Prior to uploads, the duration in the HTML Calendar should be set to "Not Timed". After synchronization, users can see the un-timed appointments in the top section of the HTML Calendar daily view.

See Also

- [Creating an Appointment](#)
- [Defining Attendees for an Appointment](#)

- [Receiving an Invitation](#)
- [Creating Repeating Task or Appointment](#)
- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)
- [Defining Your Time Zone](#)
- [Viewing and Approving Group Calendar Requests](#)

32.5 Synchronization of Tasks

Oracle supports a two-way synchronization process for the tasks that appear in the HTML Task Manager to the offline devices. This includes all of the open tasks that are owned or assigned to the logged-in user.

The synchronization process for tasks covers the following topics:

- [Synchronization Business Rules](#)
- [Synchronization Scenarios](#)
- [Synchronization Methods](#)

32.5.1 Synchronization Business Rules

In general, the business rule for task synchronization is that the tasks that appear on the user's HTML Task Manager summary page can be synchronized to the offline devices as tasks. However, there are two exceptions to this rule.

Exceptions

- Other user's tasks that the logged-in user has been granted access to will not be synchronized to the offline device even if the user has full access privileges.
How to grant another user view only or full access to your personal calendar. See [Defining Privileges for Your Calendar](#) for details.
- Repeating tasks cannot be synchronized to the offline device.

32.5.2 Synchronization Scenarios

Users can synchronize tasks to the offline device after task creation, modification, and deletion.

Typical scenarios for task synchronization are as follows:

While on the road meeting with her client, a sales representative creates a task on her Palm to send the client tomorrow some information via email. Upon returning to the office, the representative synchronizes her data with Oracle applications. The synchronization process completes successfully and the task created on the Palm now exists on her Task Manager, with the correct due date of tomorrow.

Another example can be that a sales representative downloads her tasks to Microsoft Outlook before she leaves for a series of business meetings. While attending the meetings, the sales representative updates her tasks, marking several as complete. Upon returning to the office, she connects with Oracle applications and synchronizes her data with Microsoft Outlook. Navigating to the Task Manager Summary view, she confirms that her tasks have been updated correctly, according to her updates in Microsoft Outlook.

32.5.3 Synchronization Methods

The task synchronization between Oracle applications and an offline device can be achieved by the following two ways:

- [Downloading the Tasks to the Offline Devices](#)
- [Uploading the Tasks from the Offline Devices](#)

32.5.3.1 Downloading Tasks to the Offline Devices

Whether tasks can be downloaded to the offline device or not is based on the current user's login information. As mentioned earlier, all of the open tasks that are owned or assigned to the logged-in user can be downloaded to the offline devices. However, repeating tasks and tasks that are accessible to the user because of privileges granted will not be synchronized to the offline device. Note the following information to further understand the synchronization process:

Task Status: For synchronization purposes, the task status used for synchronization will be the task header status. As the offline devices do not have the concept of header and assignee statuses for tasks, Oracle Common Application Components have determined to synchronize the task header status to the offline device.

If there are status transition rules in place for the responsibility of the logged-in user, then Oracle Common Application Components will not support changing the task status from the device. This is to ensure that the business rules that customers have identified for their users will not be overwritten during synchronization. See the [Defining Task Status](#) section and the [Defining a Status Transition and Assigning Rules](#) section in the *Oracle Common Application Components Implementation Guide* for details.

Oracle Common Application Components will not synchronize new tasks that are created in the Oracle application with the status of "Completed" to the offline devices. If a previously synchronized task is updated in the Oracle application with a status of "Completed", then upon synchronization, this task will be removed from the offline device.

The values for task statuses are synchronized based upon the following mapping. As the Palm device only supports the completed status, tasks that are not completed in the Palm are considered "Open". Microsoft Outlook supports the five statuses listed here. Oracle Common Application Components convert the statuses based upon the following mapping.

Table 32–2 Task Status Mapping

Oracle Common Application Components Task Status Name	Offline Device Status Name
Completed	Completed
On Hold	Deferred
Not Started	Not Started
In Progress	In Progress
Interrupted	Waiting on Someone Else

User defined statuses in the HTML Task Manager are converted to the offline device based upon the following table as well as the following two business rules:

- New tasks that have been created on the server with a status that has a status flag equal to "Rejected" or "Cancelled", will not be synchronized to the device. If a previously synchronized task is updated on the server to a status that has a status flag equal to "Rejected" or "Cancelled", then the task will be removed from the offline device.
- If there are multiple task status flags selected for the user-defined status, then Oracle Common Application Components select only the first status flag for evaluation.

Table 32–3 User Defined Task Status Flag Mapping

Oracle Common Application Components Task Status Flag	Offline Device Status Name
Assigned	Not Started
Working	In Progress

Table 32–3 User Defined Task Status Flag Mapping

Oracle Common Application Components Task Status Flag	Offline Device Status Name
Schedulable	Not Started
Accepted	In Progress
On Hold	Deferred
Approved	In Progress
Completed	Completed
Closed	Completed

Category: If task categories exist in both the offline devices and the HTML Calendar, upon synchronization, the category can be uploaded to the HTML Calendar. If the user creates a task in the offline device with a category that does not exist in the offline device, upon synchronization, the category specified on the offline device will be automatically created for the user in their personal preferences. The task will be created or updated with this new category in the HTML Calendar. For tasks created or updated in Microsoft Outlook with multiple categories, only the first category listed in an alphabetical order is synchronized. See the [Adding and Removing Task Categories](#) section for details.

Start and End Dates: For the purpose of smooth synchronization, Oracle Common Application Components use the profile option *Task Manager: Copy Task Start Date to End Date* to set the default date for start and end date. If it is set to Yes (default) which means the start date is copied to the end date, then the task start date is defaulted from the system date and the task end date is defaulted to the task start date. However, this profile will only affect the task creation screens, not the update screen. If this profile is set, then any change the user makes to the task start date while the user is in the task creation screen is automatically populated to the task end date field.

Whether the date chosen is planned, scheduled, or actual date is based on the profile option *Task Manager: JTF Tasks default date selected*.

It is important to note that a task with start date, but without the end date (an open-ended task), will not be downloaded to the offline device. Tasks can be downloaded if they have either both start and end dates specified or without both dates. If a previously synchronized task become open-ended in the HTML Tasks, then it will be deleted in the offline device when synchronized.

Task Priority: Task priorities in the HTML Task Manager are converted to the offline device based on the corresponding values in the Importance field of the priority setup page.

See the [Defining Task Priority](#) section in the *Oracle Common Application Components Implementation Guide* for details.

See Also

- [Defining Task Status](#)
- [Defining a Status Transition and Assigning Rules](#)
- [Defining Task Priority](#)
- [Creating a Task](#)
- [Associating a Task with a Customer](#)
- [Defining Dates for a Task](#)
- [Assigning a Resource to a Task](#)
- [Creating a Repeating Task or Appointment](#)
- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)
- [Defining Your Time Zone](#)

32.5.3.2 Uploading Tasks from an Offline Device

In general, all tasks created in the offline device can be uploaded to Oracle applications.

After uploads, the logged-in user becomes the owner of these tasks, but there are no assignees identified.

Note the following information to further understand the synchronization process:

Task Name: The task name field in Microsoft Outlook is 255 characters. However, the task name field in Oracle Common Application Components is 80 characters. Therefore, during synchronization, if the user enters a task name in the offline device that is greater than the 80 characters supported in Oracle Common Application Components, then Oracle Common Application Components truncates the task name to the first 80 characters.

Task Status: The task status created in the offline device should be matched following the same business rules for download. For the creation of the task, the owner status is defaulted to the same status as the task header.

Time Zone: Users do not specify a time zone, but set their local time in the offline devices. Upon synchronization, Oracle Common Application Components interpret the date and time created from the offline to be the time zone listed in the user preferences.

Start and End Dates: After synchronization, the due date specified in the offline device becomes the end date in the Task Manager. The start date is based upon the value selected in the device. As to whether this date is considered as planned, scheduled, or actual date displayed in the User for Calendar field, it is based on the value in the *Task Manager: JTF Tasks Default Date Selected* profile option. In addition, only the task with both start and end dates specified can be displayed in the owner's personal calendar.

It is important to note that if one of the dates is not specified, then the task will not be displayed in the personal calendar. This is because the display on calendar flag cannot be set for the task owner from the offline device.

When uploading tasks from Palm, the start date is set to the date that the task is created in Palm.

Category: The task category selected in the offline device will be uploaded to the Oracle application. If the category exists in the offline device, but does not exist in the Oracle application, then the category is created automatically for that user in the Oracle application after synchronization.

It is important to note that if the user uploads the tasks created for the first time that have no category, then these tasks can still be created in Oracle applications with the category of "Unfiled". However, upon the next synchronization, the user will receive a notice of a change for these same tasks in the offline device. This change reflects the update of the tasks' category to "Unfiled" in the offline device. This behavior is expected and is due to the Intellisync software.

See Also

- [Defining Task Status](#)
- [Defining a Status Transition and Assigning Rules](#)
- [Creating a Task](#)
- [Associating a Task with a Customer](#)
- [Defining Dates for a Task](#)

- [Assigning a Resource to a Task](#)
- [Creating a Repeating Task or Appointment](#)
- [Changing Your Personal Preferences](#)
- [Adding and Removing Task Categories](#)
- [Defining Your Time Zone](#)

32.6 Synchronization of Business Contacts

Oracle Common Application Components support the synchronization of specific Trading Community Architecture (TCA) business contacts that are available to a user. This includes uploading and downloading the business contacts from Oracle Common Application Components to offline devices.

The synchronization process for business contacts covers the following topics:

- [What Is Business Contact?](#)
- [Synchronization Scenarios](#)
- [Downloading Business Contacts to an Offline Device](#)
- [Uploading Business Contacts from an Offline Device](#)

32.6.1 What Is Business Contact?

A business contact that Oracle supports is based on the concept of TCA model. The notion of TCA includes not just customers, but also suppliers, internal organizations and employees. It holds the actual physical schema used to store customers and other trading partners in the eBusiness Suite.

For example, if company XYZ is both your customer and your supplier, most applications would store two separate representations of company XYZ with no link between them. This fragmented architecture prevents you from knowing, and thus benefiting from, the complete relationship you have with your trading partners. With the concept of TCA model, the same single data of an entity will be linked to any or all types of relationships enabling a full, 360 degree view of your trading partners.

A business contact is best defined as:

A party type "relationships" where the subject is the relationship is a party type "person" and the object of the relationship is a party type "organization".

Note: A party is an entity that can enter into a business relationship and can be of the four types: Person, Organization, Group, and Relationship.

Using this definition, Oracle Common Application Components synchronize all relationship types available between a "person" (subject) and "organization" (Object) that is part of Group PARTY_REL_GROUP_CONTACTS. Currently, TCA seeds four relationship types: "contact of", "employee of", "board member of", and "benefactor of". For example, John Smith works for Vision Corporation, and Marsha Abbott is the corporation's business contact. Based on the definition of TCA model, we can say that John is the employee of Vision Corporation and Marsha is the contact of Vision Corporation.

See Also

- [Associating a Task with a Customer](#)
- [Defining Task Contacts](#)
- [Viewing Task Contact Information](#)

32.6.2 Synchronization Scenarios

Business contacts can be synchronized between Oracle applications and an offline device for various reasons including the creation or modification of business contacts.

For example, a sales representative creates a new contact, "Sanjay Patel", for a new customer "Business World" on their Palm device while traveling. Upon returning to the office, the sales representative synchronizes her Palm device to the Oracle applications using the Intellisync software. The synchronization process gathers the information from the Palm device and creates the new organization, person, and relationship records in the Oracle applications. After synchronization, the representative navigates to their contact list and can view the newly added contact in the Oracle applications.

Another example includes a sales representative who downloads business contacts to Microsoft Outlook in preparation for a series of business meetings. While attending the meetings, one of the business contacts has new cell and pager contact numbers. The representative enters these numbers on the laptop in Microsoft Outlook. Upon returning to the office, the representative connects with Oracle applications and synchronizes data with Microsoft Outlook. The representative can

then navigate to contact and view the updated information entered on Microsoft Outlook.

In addition, synchronization process can happen for the following reasons:

- Creation of new business contacts from either Palm or Microsoft Outlook.
- Creation of new organizations (customers) from either Palm or Microsoft Outlook.
- Updates for business contacts from either Palm or Microsoft Outlook.
- Inactivating business contacts from either Palm or Microsoft Outlook.

32.6.3 Downloading Business Contacts to an Offline Device

This section covers the following topics:

- [Business Rules for Downloads](#)
- [Synchronization Behavior](#)

32.6.3.1 Business Rules for Downloads

Some business contacts cannot be downloaded to an offline device. The synchronization rule is based on the definition of business contacts that Oracle Common Application Components support, and on the existing Oracle Sales Online (OSO) security.

Definition of Business Contacts

As mentioned previously, the business contacts are defined as party type "relationships" where the subject is the "person" and the object is the "organization". In order to download valid business contacts to an offline device, Oracle Common Application Components use the following criteria to produce a clean list of business contacts for synchronization. Any records which do not match the criteria will be ignored and will not be downloaded to offline devices:

- Business contacts are defined as party type "relationships" where the subject is the "person" and the object is the "organization".
- The status of the party "relationship" is active.
- The status of the party "person" and "organization" are active.
- All relationship types available between a "person" (subject) and "organization" (Object) that is part of Group PARTY_REL_GROUP_CONTACTS.

Note: The synchronization criteria for business contacts that Oracle Common Application Components use is slightly different from the criteria used by Oracle Sales Online.

Based on the synchronization criteria for business contacts, Oracle Common Application Components will not synchronize inactive business contacts (party type relationship) to the offline device if they have never been synchronized previously. However, Oracle Common Application Components will remove a business contact (party type relationship) on the offline device once it has been inactivated in the Oracle application. This reduces the amount of unnecessary business contacts being synchronized to the offline device.

Oracle Common Application Components will confirm the status for both the subject and object of the relationship are all active before synchronization. Otherwise, the contact will not be synchronized.

For the last criterion, based on the concept of TCA, Oracle Common Application Components will synchronize all relationship types available between a "person" (subject) and "organization" (Object) that is part of Group PARTY_REL_GROUP_CONTACTS. The seeded values are: contact of, employee of, board member of, and benefactor of. Only party types of "relationship" that have a relationship type equal to these seeded values will be synchronized to the offline device. In addition, Oracle Common Application Components also support synchronizing the specific details from the "relationship" record to the offline device. The details supported for synchronization for the "relationship" record include only those items that are provided by Intellisync. This includes address information. Oracle Common Application Components will only synchronize the identifying address from the "relationship" record to the offline device. See the [Field Mappings](#).

See Also

- [Associating a Task with a Customer](#)
- [Defining Task Contacts](#)
- [Viewing Task Contact Information](#)

Oracle Sales Online Security

Who has access to what data and who can update data in the Oracle Sales Online security structure is based upon a combination of responsibilities, profile values, and the user's sales team. Oracle Common Application Components utilize these same rules and conditions for the creation and maintenance of business contacts

from the offline device. See *Oracle Sales Online Implementation Guide* for detailed information.

32.6.3.2 Synchronization Behavior

After downloading business contacts to the offline device, all business contacts should be created with the category of "Oracle Business". This is because the profile option *JTF Sync: Category Value* has the default value "Oracle Business" set at the system level. The value for the profile option can be changed in the Lookup code (*JTF Sync: Category Value*) by your system administrator based on your business needs.

Phone information is copied from the "relationship" record to the offline device. Phone types (e.g., inbound, outbound) that exist in the Oracle Sales Online application, but do not exist in the offline device, will not be synchronized. However, there is one exception to this rule that if the user has specified the phone type of general as "display on Oracle Sales Online", then Oracle Common Application Components will default this phone to "main/business" in the offline device.

Since there are more phone numbers supported in Oracle applications than the offline devices can support, Oracle Common Application Components will download the maximum amount possible from the application to the offline device as supported by Intellisync. In addition, Oracle Common Application Components will always download the "display on Oracle Sales Online" phone type from the application to the offline device.

As Intellisync provides only one field for the country, area code, main phone number, and extension, in order to preserve the phone fields, Oracle Common Application Components use the following phone format to synchronize to and from the offline device:

+ *country code (area code) phone number <extension>*

All phones synchronized to the offline device should appear on the device in this format. If the phone number is entered in the offline device in the same format, then it will be parsed during the synchronization and be placed in corresponding columns. Otherwise, it will be placed in the phone number column.

32.6.4 Uploading Business Contacts from an Offline Device

Not every contact in the offline device can be uploaded to the Oracle applications. The synchronization rule is based on the existing Oracle Sales Online security. In addition, only contacts with category of "Oracle Business" are eligible for upload.

This is to avoid retrieving personal contacts from the offline device and uploading them to become corporate data.

Note: Category "Oracle Business" does not exist in the Master Category List in Microsoft Outlook. Therefore, to upload contacts from Microsoft Outlook to Oracle applications, users either have to enter "Oracle Business" for every contact in the Category field or add "Oracle Business" category to the Master Category List manually.

For downloads, the category of "Business Contact" is automatically created for the contact in the Outlook. This is because the profile option *JTF Sync: Category Value* has the default value "Oracle Business" set at the system level.

Upon synchronization, business contacts can be created or updated in the following ways:

- [Creating a New Contact for a New Company](#)
- [Creating a New Contact for an Existing Company](#)
- [Updating Business Contacts from Palm or Outlook](#)

Creating a New Contact for a New Company

When Oracle Common Application Components create a new business contact (relationship) for a new organization, Oracle Common Application Components also create subject (person) and object (organization) of the relationship. The party type "person" for the subject should have first name or last name identified in the offline device.

The creation of party "person" and party "organization" can be driven by the following two profile options defined in Oracle Sales Online:

- OS: Address Required for Organization:
This requires an address specified for an "organization" record upon creation of that organization. However, if a new contact for a new organization is created without a business address specified in the offline device, then this record will not be uploaded to the Oracle Common Application Components regardless of the value set in the profile.
- OS: Address Required for Person

This requires an address specified for a "person" record upon creation of that person.

In summary, to be able to upload a new business contact to Oracle Common Application Components, a contact must have the following information provided in the offline device:

- A country name and the address line one if one of the following profile options are set to Yes in Oracle Sales Online:
 - OS: Address Required for Organization
 - OS: Address Required for Person
- An organization name
- A business contact's name with either the first name or last name

If the required information is not specified in the offline device, business contacts will not be synchronized to the application.

Phone information will only be copied to the "relationship" record. Phone types (e.g., Home, Other) that exist in the offline device, but do not exist in the Oracle Sales Online application, will not be synchronized. However, there is one exception to this rule. If the user has specified the phone type of business/work in the offline device, then Oracle Common Application Components will default this phone to "display on Oracle Sales Online" in the Oracle Sales Online application.

As to the phone format, Oracle Common Application Components use the same format for both upload and download. If the user creates a new number (or updates an existing number) on the offline device using the same format, the number will be parsed accordingly. If the user does not utilize the format provided on the device, then the entire number will not be parsed and will be placed into the main phone number field in Oracle applications.

Address information provided in the offline device can be copied to all three party records. Upon creating a new address for any of the party types (person, relationship, and organization), Oracle Common Application Components use the profile option *OSO: Default Address Type* to determine the address type value. Additionally, the "relationship" address must be kept in sync with the party type "person" address.

Users can create an address for both "business" and "home" in Microsoft Outlook, for the purpose of creating an address for the organization and person records, Oracle Common Application Components choose the "business" address and mark it as primary address. The "home" address can be copied to the "person" and "relationship" records, but will not be marked as primary.

Oracle Common Application Components support a multi-line address for a business contact created in the offline devices. For example, a user creates a business contact with the following address information entered in the multiple address lines:

- 123 Street
- 67th Floor
- Mail Stop 6701

Upon synchronization, this multi-line address is parsed out into separate address fields supported in TCA (Address 1, Address 2, Address 3, and Address 4). After synchronization, the example address appears in TCA should read: Address 1 = 123 Street, Address 2 = 67th Floor, Address 3 = Mail Stop 6701.

Instead of creating one new contact for a new company, a user creates five new contacts in the offline device. Three of them have different address information identified. Both of the address required profiles are set to "yes". As all three addresses are different, it is not possible to know which of these addresses will be used to create the organization's address in TCA. Once the organization is created upon synchronization, all future addresses for the rest of the three contacts with addresses will be created for the person and relationship record only. The two new contacts without addresses will not be created because the address required profiles were set to "yes".

Note: The customer category field in Oracle Sales Online is not the same category field (Oracle Business) used for the synchronization. Upon creating a new organization in TCA, Oracle Common Application Components use the profile option *OSO: Default Customer Category* to default customer category value in Oracle Sales Online.

Creating a New Contact for an Existing Company

Oracle Common Application Components support creating a new contact for an existing company. In order to make sure that the company is not duplicated on the server, Oracle Common Application Components utilize the TCA public API, "HZ_FUZZY_PUBLIC". This API provides simple de-duplication, catching duplicates based on simple misspellings of common words, names, switched characters, and is case insensitive.

Updating Business Contact from Palm/Outlook

While updating business contacts in the offline device, be aware of that not every change you made can be uploaded to Oracle applications. Whether your changes can be synchronized or not depends on the following conditions:

- Changes to the Company

Oracle Common Application Components support updating only the "relationship" information from the offline device to the application. Updates to the "organization" (company's name) are ignored from the offline device. If a user changes the company name and address information in the offline device, then only the address information can be updated to the application. The changes made to the company's name will be ignored. Therefore, it is recommended that you only make changes to a company name in the Oracle applications.

- Changes to Business Contacts

If a user deletes a business contact in the offline device, then this contact will not be deleted in the Oracle applications, but it becomes inactive. This results in placing the relationship record as inactive in the Oracle applications. Similarly, if a previously synchronized contact is inactivated in the Oracle applications, then this contact will be deleted in the offline device during synchronization.

- Changes to Business Contact's Category

As stated earlier, only business contacts with category of "Oracle Business" in the offline device are eligible for upload. However, various updates made to the business contact with category of "Oracle Business" can result in the following different outcomes due to the way of the Intellisync software processes the data to the Oracle applications:

- If the user changes the contact with category of "Oracle Business" in the offline device to any category other than the "Oracle Business". Upon synchronization, the change is not uploaded to the server and the category will still be "Oracle Business".
- If the user changes the contact to any category other than the "Oracle Business" and then deletes the contact in the offline device. Upon synchronization, the contact becomes inactivated in the Oracle applications.

- Changes to Business Contact's Address and Phone Information

Oracle Common Application Components support the updates made to the address and phone information in the offline device. After uploads, the updated address information can be copied to both the "relationship" and "person" record in TCA. This is because Oracle Common Application Components keep the party "person"

address in sync with the party "relationship" address. This applies to updates made for both "home" and "business" address in Microsoft Outlook. Updated phone information in the device is updated only on the "relationship" record in the application.

See Also

- [Associating a Task with a Customer](#)
- [Defining Task Contacts](#)
- [Viewing Task Contact Information](#)

32.7 Palm and Outlook Synchronization FAQs

What is synchronization?

Synchronization is a process by which information that you enter once, in either Oracle applications or your offline device, will be immediately available in both places. You can synchronize appointments, tasks, and Trading Community Architecture (TCA) business contacts available to the logged-in user.

Is synchronization a two-way process?

Yes, synchronization is two-way allowing you upload and download critical business and personal data between Oracle applications and an offline device (a Palm OS or Microsoft Outlook) connected to your personal computer.

How is synchronization achieved?

Through our partner, Pumatech Inc.'s "Intellisync® for Oracle", Oracle provides a two-way synchronization process for uploading and downloading critical business and personal data between Oracle applications and your offline device (Palm OS or Microsoft Outlook).

Does Palm and Outlook need to be installed before Intellisync?

You must install either Palm OS or Microsoft Outlook before configuring the Intellisync software.

Should I back up my data before synchronizing?

It is highly recommended that you take a minute to back up your offline data before synchronizing for the first time. In the future, we recommend that you back up your data regularly.

Will all data from my offline device be synchronized?

In general, all of your appointments, tasks, and business contacts will be synchronized. However, some of the related information (notes/memos, attachments, references, and attendees) will not be synchronized. Additionally, you can restrict the offline data that is being synchronized by configuring the "Intellisync® for Oracle" software during the setup process.

How do I restrict the data that is being synchronizing from my offline device?

Data from your offline device can be restricted by creating filters (such as Exclude Private Data) while setting up the Intellisync software. All filters should only be created before performing your initial synchronization. Creating or modifying filters at a later stage may potentially lead to loss of shared data.

When is the start date for the data to be synchronized?

The first time you install Intellisync or you synchronize data for the first time, the default date is January 1st, 1970. Thereafter, default date is reflected for the synchronized item whenever the syncing process occurs. If the synchronization process does not complete successfully which means you receive unexpected synchronization errors, then the default date for a specific item will be reset to the date when the process completed last time.

For example, you have synchronized tasks and appointments from Oracle applications to your palm three times since the first time you installed Intellisync software. The default start date changes each time after the process is complete successfully as follows:

1. June 15, 2002: Change from January 1st, 1970 to June 15, 2002
2. June 30, 2002: Change from June 15, 2002 to June 30, 2002
3. August 10, 2002: Change from June 30, 2002 to August 10, 2002

If you receive unexpected errors for tasks, but not appointments, on the third time, then the default start date for tasks will be reset to June 30, 2002 when is the last time the process complete successfully. The default start date for appointments would still be August 10, 2002.

What happens if I cancel the synchronization process?

If you cancel the synchronization process during processing or when prompted to accept/decline the changes, then Intellisync will reset the synchronization date back to the original January 1st, 1970 date. When you attempt to synchronize after this,

Intellisync will treat this as your first synchronization and some data duplication may occur.

Should the Hot Sync Manager be running in order to synchronize?

The Hot Sync Manager should be running only if you are synchronizing to Palm device.

What happens if a contact in my offline device has not been associated with a company or has a missing business street address?

If a business contact in your offline device has a missing company name or missing business street address, then this contact will not be created in the Oracle applications. During synchronization, a warning message will be issued for these records.

Can I create customers from my offline device?

Customers can be created in the Oracle applications upon synchronization if the following information is provided in your offline device:

- A country name and the address line one if one of the following profile options are set to Yes in Oracle Sales Online:
 - OS: Address Required for Organization
 - OS: Address Required for Person
- An organization name
- A business contact's name with either the first name or last name

If the requirement information is not specified in the offline device, customers will not be synchronized to the application.

What happens if I change the company's name associated with a contact in my offline device?

If you change the company's name in the offline device, then the Intellisync engine will synchronize this change to the Oracle applications, but the Oracle applications ignore this change to the company name and this will not be reflected in the Organization information. Therefore, it is recommended that you only make changes to a company name in the Oracle applications.

Can I modify information about a customer site address form my offline device?

Yes, you can. Any changes made to a previously synchronized contact's business address in the offline device will be captured in the Oracle Common Application Components.

What happens if I delete a previously synchronized contact from my offline device?

If you delete a previously synchronized contact from your offline device, then during synchronization, this contact will be made inactive in Oracle Common Application Components. Similarly, if a previously synchronized contact is inactivated in Oracle Common Application Components, then this contact will be deleted in the offline device during synchronization.

How does de-duplication of contact work?

If a new contact is created in the offline device, then during synchronization, Oracle Common Application Components utilize the TCA public API, "HZ_FUZZY_PUBLIC", to de-duplicate contacts by catching duplicates based on simple misspellings of common words, names, switched characters, and is case insensitive.

Is the Home Phone number I specified in the offline device synchronized to the Oracle applications?

No. The Home Phone number in your offline device will not be synchronized to the Oracle applications.

Which tasks are synchronized between my offline device and Oracle Common Application Components?

In general, all tasks created in your offline device can be uploaded to Oracle Common Application Components. For downloads, all of the open tasks that either you own, or are assigned to can be downloaded to your offline device.

Please also be aware of that not all the tasks that appear on your HTML Task Manager summary page can be synchronized. The tasks that you have been granted access to will not be synchronized even with the full access privileges. Additionally, repeating tasks will not be synchronized to the offline device.

What happens if my previously synchronized task is assigned to a different user in Oracle applications?

If you reassign a previously synchronized task to a different user in Oracle applications, then during synchronization, this task will be deleted from your offline device.

Can I synchronize repeating tasks between the offline device and Oracle applications?

The repeating tasks cannot be downloaded from Oracle applications to your offline device. However, if a repeating task is created in your offline device and uploaded to Oracle applications, then only the first task can be created in the Oracle applications.

What happens if I do not define start and end dates for a task?

If a task is created in the HTML Tasks with no start or end date, the record will still be synchronized to the offline device. However, if a task with start date, but without the end date (an open-ended task), then this task will not be downloaded to the offline device.

If a previously synchronized task become open-ended in the HTML Tasks, then it will be deleted in the offline device when synchronized.

Can I synchronize task or appointment notes, attachments, references?

No. None of the notes, attachments, or references that are associated with an appointment or task will be synchronized to your offline device.

Can I attach items to an appointment or task in Outlook and have those synchronized to Oracle applications?

Attachments to an existing appointment or task in Microsoft Outlook that appear in the "description/note" section will not be uploaded to the Oracle applications.

However, since the name of the file or note is listed in the "description/note" section in Microsoft Outlook, the name will be reflected in the Oracle application. The actual file, however, will not be synchronized.

Which appointments are synchronized between my offline device and Oracle Common Application Components?

In general, all the appointments, not tasks, that appear on your HTML Calendar daily view can be synchronized to the offline device as appointments except the appointments that you have been granted access to will not be synchronized. For

uploads, all appointments created in your offline device can be synchronized to the HTML Calendar.

Can I synchronize appointment attendees?

No. Apart from being invited to a specific appointment, none of the appointment attendees will be downloaded to your offline device.

Why does some of the appointment or task related information seem to disappear after I synchronize?

There are a few situations where Intellisync treats an update to an appointment or a task as a deletion of the original and creation of a new appointment or task. In these situations, some of the related information (attendees, references, notes, attachments) will be removed in the Oracle applications.

The situations mentioned include:

- Altering a previously synchronized non-repeating appointment or task in the offline device to make it repeat.
- Altering a previously synchronized all-day appointment in the offline device to make it span across days.
- Changing repeating rules for appointments
- Changing a repeating appointment to non-repeating

Can I synchronize my group calendar appointments?

You can download your group calendar appointments that appear in your HTML Calendar to the offline devices. However, if you update your group calendar appointments in your offline device, then these changes will not be uploaded to the HTML Calendar.

How can I identify an invitation to a group calendar appointment in my offline device?

If you are invited to a group calendar appointment in the HTML Calendar, then during synchronization "INVITE:" will precede the appointment name in your offline device.

To accept the invitation, you can remove the prefix "INVITE:" from the appointment name in your offline device. To reject the invitation, simply delete the appointment from your offline device.

Can I synchronize recurring appointments?

Yes, you can synchronize recurring appointments. However, updating certain attributes of the recurring appointment, such as frequency or end date, may produce inconsistent results.

Can you sync appointments that span two or more days?

Appointments that span two days, e.g. 11pm to 1am cannot be synced.

Can you synchronize past appointments?

Yes, you can synchronize past appointments if the Transfer all scheduled items radio button is selected during the setups.

What happens if there is an error during synchronization?

Under normal circumstances, synchronization will not produce an error. However, if for some reason an error occurs (such as connection to the internet abnormally disconnected), then you will have to perform a fresh synchronization. For example, the synchronization will be performed without the history of previously synchronized records, like a first time synchronization.

Can multiple users synchronize their data at the same time?

No. Multiple users working on the same computer will not be able to synchronize their data without causing an error to occur.

Can I update the information about an appointment to which I have been invited?

No. While you can update the information in the offline device, none of those updates will be reflected in the Oracle applications.

The Intellisync engine will synchronize these changes to the Oracle applications, but the Oracle applications ignore these changes and they are not reflected in the appointment.

32.8 Troubleshooting Tips

This section contains information on some of the common problems associated with the synchronization process.

32.8.1 The Synchronized Tasks Are not Displayed in HTML Task Manager

Cause: This may be caused by the wrong value in the profile option Task Manager: Default Task Type.

Action: Contact your System Administrator to change the profile option to have a valid task type.

32.8.2 Session Validation Error

Error Message: Session Validation Error. It could be because either your session timed out or you entered an Invalid Username/Password combination. Please try to login again. If you have not yet registered, please Register before trying again. If the problem persists please contact your System Administrator.

Cause: This Oracle server login problem is usually caused by wrong username and password.

Action: If you have not yet registered, register your username and password in Oracle application before trying to log in again. If you have already registered, then verify your username and password entered in Intellisync.

Tips: You can validate your login information by trying to log on to other Oracle applications using the same login name and password. If it works, then you know it could relate to the registration issue.

32.8.3 Problem Logging on to the Web Server (ERR-214)

Error Message: Problem logging on to the web server. (ERR-214) Please check your user name and password. If the problem persists, contact Customer Support.

Cause: This Intellisync server login problem is caused by wrong configuration for Connection or when the middle-tier server is down.

Action: Use the following steps to troubleshoot the problem:

1. Check if apache is down.
2. If apache is working, check [Connection] section in the file DCSSettings.cfg.
3. Make sure the Use secured server connection check box in the configuration settings window is unchecked if not using the secured server.

32.8.4 Problem Configuring Web Connection

Error Message: You must configure web connection information prior to selecting this function.

Cause: This Intellisync error message is caused by not selecting your conduits and items before clicking the **Synch** button.

Action: Use the following steps to configure necessary items for synchronization:

1. After entering company name, username, and password information, select **Configuration Applications** in the configuration settings window.
2. In the configuration window, select the check box next to the item name that you want to synchronize.
3. Click **Choose** to select the conduit (either PalmPilot Organizer or Microsoft Outlook) for your selected item.
4. Highlight the item that you want to synchronize first if you have more than one items selected.
5. (Optional) Click **Advanced** to further customize the setups.
6. Click **OK** to return to the configuration settings window.
7. Click **Save** to return to the main banner window.
8. Click **Synch** to start synchronizing your data if Microsoft Outlook is selected. Otherwise, push the Synchronization button on the PalmPilot cradle.

32.9 Field Mappings

Intellisync supports the following data mapping during the synchronization.

Note: The Start Date, End Date, Start Time and End Time fields factor in time zone conversion during synchronization.

Table 32–4 Data Mappings

Functional Area	Oracle Applications	Outlook	Palm
Appointments			
	Name	Subject	Description

Table 32–4 Data Mappings

Functional Area	Oracle Applications	Outlook	Palm
	Description	Description	Note
	Start Date	Start Date	Start Date
	Start Time	Start Time	Start Time
	End Time	End Time	End Time
	End Date	End Date	N/A
	Priority	N/A	N/A
	Category	Category	N/A
	Remind Me	Reminder	Alarm
	Private	Private	Private
	Daily Repeating	Daily Repeating	Daily Repeating
	Weekly Repeating	Weekly Repeating	Weekly Repeating
	Monthly Repeating	Monthly Repeating	Monthly Repeating
	Yearly Repeating	Yearly Repeating	Yearly Repeating
Tasks			
	Name	Subject	Description
	Description	Description	Note
	Start Date	Start Date	N/A
	Start Time	Start Time	N/A
	End Time	End Time	N/A
	End Date	Due Date	Due Date
	Priority	Priority	Priority
	Category	Category	Category
	Private	Private	Private
	Status	Status and % Complete	Completed Flag
	Status	Status	N/A

Table 32–4 Data Mappings

Functional Area	Oracle Applications	Outlook	Palm
Business Contacts			
	Category	Category	Category
	Title	Title	N/A
	First Name	First Name	First Name
	Last Name	Last Name	Last Name
	Middle Name	Middle Name	N/A
	Organization	Company	Company
	Job Title	Job Title	N/A
	Business Street	Business Street	Address
	Business City	Business City	City
	Business State	Business State	State
	Business Zip	Business Zip	Zip
	Business Country	Business Country	Country
	Home Street	Home Street	N/A
	Home City	Home City	N/A
	Home State	Home State/ Providence	N/A
	Home Zip	Home Zip/ Postal Code	N/A
	Home Country	Home Country	N/A
	Email	Email	Email
	Business Phone	Business	Work
	Mobile Phone	Mobile	Mobile
	Fax	Business Fax	Fax
	Pager	Pager	Pager

Part VI

Forms-based Calendar

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Introduction to the Oracle Forms-based Calendar](#)
- [Overview of using the Oracle Forms-based Calendar](#)
- [Managing the Forms-based Calendar](#)

Introduction to the Oracle Forms-based Calendar

This chapter covers the following topics:

- [Overview of the Oracle Forms-based Calendar](#)
- [Oracle Forms-based Calendar Integrations](#)
- [Process Flow for the Oracle Forms-based Calendar](#)

33.1 Overview of the Oracle Forms-based Calendar

Calendar is a scheduling tool used to define and view available and non-available time for a resource or group of resources. You can create a calendar for yourself or another resource, associate work shifts to a calendar, and assign a resource to a shift, depending on availability. The following topics provide additional information on calendar setup and the datebook:

- [Calendar Setup Window](#)
- [Calendar Datebook](#)

33.1.1 Calendar Setup window

Use the Calendar Setup window to create time periods in a Calendar Datebook for yourself or another resource. Calendar setup uses shifts and patterns to define time availability and accommodate the most complex situation for a resource. You can define both your working hours and your unavailable hours such as holidays and vacations.

What is Available Time?

Available time is defined using shifts and patterns. It is the time a resource is available for scheduled work.

What is a Shift?

A shift defines when a person is available to work. For example, a shift can be created that defines the default working week Monday to Friday 8:30 to 17:00.

Note: The Forms-based version of Calendar includes the ability to support a 24 hour shift, which makes it possible for graveyard shifts to be covered with one shift instead of two. In previous versions, two separate shifts had to be created to cover a shift which spanned between two separate days, such as, 10:00pm-2:00am.

What is a Shift Pattern?

A set of shifts that are set as a pattern.

Example

- Shift A, Field Support, starts at 8:00 and lasts 9 hours.
- Shift B, Stand By, starts at 20:00 and lasts 12 hours.
- On days 1 through 4, the resource can be assigned shift A, and then days 6 and 7 shift B, and day 5 can be free.

What Is Non-available Time?

Non-available time is a defined block of time when a resource is not available to accept a task.

Non-available time includes:

- Personal appointment
- Public holidays
- Meetings
- Vacations
- Illness

33.1.2 Calendar Datebook

Use the Calendar Datebook to view time availability for yourself, a resource, or a group of resources. In the datebook, a resource's schedule can be viewed in a daily, weekly, or monthly format.

In your Datebook you can view:

- Working hours
- Assigned tasks
- Personal appointments
- Official holidays and vacation days

In addition, you can:

- Create a ToDo list for the day, week, or month
- Access the Tasks application to edit a task

33.2 Oracle Forms-based Calendar Integrations

The Forms-based Calendar uses the following Oracle modules to provide functionality:

- Task Manager (Forms) to create a personal ToDo List (tasks) and different calendar views.
- Resource Manager to locate a specific resource for different calendar views.

The Forms-based Calendar is widely used by various modules across Oracle e-Business Suite:

- TeleService and Field Service uses Calendar to access the Calendar Datebook to view a specific resource's availability and assign task information.
- Assignment Manager uses Calendar to display resource work shift information through the Gantt chart. Service applications can then use Assignment Manager to locate appropriate resources for a service request or a task.

33.3 Process Flow for the Oracle Forms-based Calendar

The following table describes the order and process of using the Forms-based Calendar.

Table 33–1 Forms-based Calendar Process

Steps	Description
Create Tasks and Todos in a Calendar	Access your personal calendar to create and edit tasks and Todos.
View a Datebook	View a work shift, task, or time off for yourself, a resource, or a group of resources.
Create a ToDo List	Create a personal ToDo list for yourself in your personal calendar.

Overview of Using the Oracle Forms-based Calendar

This chapter covers the following topics:

- [Accessing the Oracle Forms-based Calendar Interface](#)
- [Summary of Oracle Forms-based Calendar Tasks](#)

34.1 Accessing the Oracle Forms-based Calendar Interface

Perform the following steps to log in to the Forms-based Calendar.

Prerequisites

You must be an employee type resource to use calendar.

Responsibility

Telesales Agent

Navigation

Navigate to the eBusiness Center.

Steps

Click the Datebook icon from the application icon menu to access the Calendar Datebook.

34.2 Summary of Oracle Forms-based Calendar Tasks

Use the Oracle Forms-based Calendar to perform the following tasks:

Chapter 35, Managing the Forms-based Calendar

Managing the Oracle Forms-based Calendar

This chapter covers the following topics:

- [Creating Tasks and ToDos in a Calendar](#)
- [Viewing a Datebook](#)
- [Creating a ToDo List](#)

35.1 Creating Tasks and ToDos in a Calendar

Use the Calendar Datebook functionality in the Oracle Telesales application to view scheduled activities and create ToDos in Calendar.

Please note that the Calendar Datebook also uses the task status transition rules. 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. Therefore, when creating a private task, you will only see the task statuses defined in the status transition rule that is associated with your logging-in responsibility populated in the Status list of values.

For example, a Service Request transition rule is associated with the Field Service Dispatcher responsibility. Only when you logged on with the associated responsibility, you will be able to see the task statuses based on the Service Request transition rule displayed in the list of values.

See [Defining Task Statuses and Status Transition Rules](#) section about task status transition rules in Task Manager of the *Oracle Common Application Components Implementation Guide*.

Perform the following steps to gain access to your personal calendar and create and edit tasks and ToDos.

Prerequisites

You must have a personal calendar.

Responsibility

Telesales Agent

Navigation

Navigate to **eBusiness Center**.

Steps

1. Click the Calendar Datebook icon from the eBusiness Center.
2. Select any group in the Role and Group field of the Choose Role and Group window and click **OK** if necessary.
3. (Optional) Select **All Tasks** option button and click **New** to create a task.

The Tasks window opens.

See [Creating, Updating, and Finding Tasks](#) for more information on creating tasks.

4. (Optional) Select **ToDo** and click **Private Tasks** option button and click **New** to create or edit a **ToDo**.

The Create/Edit **ToDo** form opens. Fill in the appropriate information and click **OK**.

See [Creating a **ToDo** List](#) for more information on creating a **ToDo** list.

5. Save your changes and close the Calendar.

35.2 Viewing the Datebook

Use the Datebook window to view a work shift, task, or time off for yourself or another resource, or a group of resources. The Calendar Datebook is specific to the Telesales application. Perform the following steps to view the datebook.

Prerequisites

None

Responsibility

Telesales Agent

Navigation

Navigate to **eBusiness Center**.

Steps

1. From the Calendar Name field, select the calendar name you want to view. For example, a personal or work calendar.
2. From the drop-down list next to the Resource Employee field, select the resource or group of resources available for the chosen calendar.
3. Select either the Day, Week, or Month tab depending on the time period you want to view.

35.3 Creating a ToDo List

You can create a personal ToDo list for yourself. Please note that you will only see the task statuses defined in the status transition rule that is associated with your logging-in responsibility populated in the Status list of values.

Perform the following steps to create a ToDo list.

Prerequisites

None

Responsibility

Telesales Agent

Navigation

Navigate to **eBusiness Center**.

Steps

1. Select the **Private Tasks** option button.
2. Click **New**. The Create/Edit ToDo window appears.
3. Enter the name of your ToDo. This entry appears in the ToDo region.
4. Enter a description of the ToDo.
5. Enter the priority.
6. Enter the status.
7. Enter the effective dates and click **OK**.

Part VII

Escalation Management

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Introduction to Oracle Escalation Management](#)
- [Overview of Using Oracle Escalation Management](#)
- [Overview of Reactive Escalations: Escalation Manager](#)
- [Overview of Proactive Escalations: Business Rule Monitor](#)
- [Using Escalation Manager](#)

Introduction to Oracle Escalation Management

This chapter covers the following topics:

- [Overview of Oracle Escalation Management](#)
- [What's New in This Release](#)
- [Oracle Escalation Management Integrations](#)
- [Process Flow for Oracle Escalation Manager](#)
- [Terms and Definitions](#)

36.1 Overview of Oracle Escalation Management

A company, using Escalation Management, can reprioritize, reassign, and monitor a situation to a satisfactory completion. There are two types of escalations: reactive and proactive. Each are discussed in the subsequent sections. Escalation Manager is the "reactive" end of Escalation Management. The Business Rule Monitor (BRM) is the "proactive" escalation process. The following can be escalated in either modules:

- A task
- A service request
- A defect

The following sections describe an escalation.

- [What is an Escalation?](#)
- [What is a Reactive Escalation?](#)
- [What is a Proactive Escalation?](#)

- [What Are Some of the Features of an Escalation?](#)

36.1.1 What is an Escalation?

An escalation is actually a process used to highlight or flag certain issues within an organization, so that the appropriate personnel can respond to these situations and monitor the resolutions. Escalations occur in support centers for a variety of reasons. An escalation management system allows an organization to identify, track, monitor, and manage situations that require increased awareness and swift action.

In a reactive escalation, a customer calls and reports a problem and you must **react** to it and resolve the issue. In a proactive escalation, you notice a **potential** issue and you resolve it before the customer contacts you. In other words, did you catch a potential problem before a customer complained? The following sections describe each type of escalation in greater detail.

36.1.2 What is a Reactive Escalation?

In a reactive escalation, a business must take the necessary action to resolve a situation. Most businesses want to track issues such as: which customer complained, when the complaint was logged into the system, who was assigned to fix the problem, was the problem fixed or did it need to be manually assigned to someone else, and is the problem finally resolved.

Example

Business World, a customer of Vision Corporation, complains that a hardware problem reported one week ago is still not completely repaired. Vision Corporation assigns different resources, that are more experienced, to handle this hardware problem immediately. Manually assigning escalation resources is possible through the Escalation Manager.

36.1.3 What is a Proactive Escalation?

A company that values great customer service may implement systems that monitor situations alerting them before a crisis occurs. What criteria do they use for monitoring these situations? Usually, this is based on established business rules of the company. However, proactive escalation can also be set up as a follow-up action.

Example

Vision Corporation wants to enforce the rule that any open task must be closed within five business days. If it has been four days since the task is opened, then the

owner of this task must send an e-mail to the assignee as a reminder and also check if any assistance is needed. The Business Rule Monitor (BRM) is used to raise awareness. It provides a centralized place to define and monitor business rules on a regular basis.

Vision Corporation has also set up a business rule that seven days after closing a service request, it will send an e-mail to verify that the customer is satisfied and thanks them for doing business with them.

Note: In summary, a proactive escalation is usually initiated by the Business Rule Monitor (BRM) system based on business rules. Therefore, it is considered an automated escalation. A reactive escalation is primarily initiated by a person in response to customer's needs. Therefore, it is considered a manual escalation.

36.1.4 Escalation Features

The following are some features of Escalation Management:

- Escalation situation tracking information
- Service Request, task, and defect linking capability
- Ownership assignment
- Resolution plan definition with associated tasks and notes
- Automatic notification of escalation progress to identified contacts
- De-escalation and closure

Basic information is captured in an escalation document which includes the requester, the required resolution date, and additional contacts that are involved.

An escalation is managed by creating an escalation document, assigning an escalation owner, defining the actions needed to resolve the escalation, and communicating the progress. Once a situation is de-escalated, the escalation closure note is captured and a final communication is sent to the contacts involved.

36.2 What's New in This Release

Group owners can now be enabled in this release of Escalation Manager.

36.3 Oracle Escalation Management Integrations

Escalation Manager

- **Trading Community Architecture (TCA)** information, such as business contacts, is pulled into escalated documents.
- **Oracle Quality Online (OQO)** is where defects are created and they can manually be escalated through Escalation Manager.
- **Service Request** is where service requests are created and they can manually be escalated through Escalation Manager.
- **Oracle Workflow** is used to send out workflow notifications to relevant resources when an escalation document is created or updated.
- **Territory Manager** is used to automatically retrieve qualified resources identified in the escalation territories as the owner of an escalation document when using Assignment Manager with territory assisted assignment option.
- **Task Manager** (Forms-based) is used to attach additional tasks to an escalation document. Tasks created in Forms can also be manually escalated through Escalation Manager.
- **Assignment Manager** is used to automatically assign a qualified resource identified in the escalation territories as the owner of an escalation document.
- **Notes** (Forms-based) is used to attach additional notes information to an escalation document.

Business Rule Monitor (BRM)

- **Oracle Quality Online (OQO)** is where defects are created and they can automatically be escalated through BRM.
- **Service Request** is where service requests are created and they can automatically be escalated through BRM.
- **Oracle Workflow** is used by the seeded workflow processes to send out workflow notifications to relevant document owners.
- **Territory Manager** 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.
- **Task Manager** is used by the seeded workflow processes to create an automated escalation task. This is generally through the seeded Automated

Escalation Template Group for Task Manager (Service Request or Defect Management) defined in the Forms-based Task Manager. Tasks created in Forms can also be automatically escalated when a business rule is violated.

36.4 Process Flow for Oracle Escalation Manager

The following table describes the order and process of using Escalation Manager.

Table 36–1 Escalation Manager User Process

Step	Description	Required	Performed By
Manage a Service Request	A service request is a document that tracks information regarding a customer's product and service problems.	Yes	All Users
Manage a Task Escalation	A task is a document that tracks work to be done by a support center.	Yes	All Users
Manage a Defect Escalation	A defect is a document which tracks product problems and resolutions. This is escalated through Oracle Quality Online.	Yes	All Users
Add a Note to an Escalation Document	Notes allow additional information to be attached with the escalation document.	Optional	All Users
Add a Task to an Escalation Document	Use an attached task to document any follow-up activity or possible resolution for the escalation.	Optional	All Users
Changing an Escalation Status	Manually changing an escalation status generates a notification to the designated contacts.	Yes	All Users

36.5 Terms and Definitions

The following table describes Escalation Management terms and definitions.

Table 36–2 Escalation Management Terms and Definitions

Term	Description
BRM module	The Business Rule Monitor (BRM) provides a User Interface (UI) and functionality that an organization can use to proactively manage escalations. It consists of two components: <ul style="list-style-type: none"> ■ Business Rule Monitor ■ Business Rule Workbench

Table 36–2 Escalation Management Terms and Definitions

Term	Description
Business Rule Monitor	The Business Rule Monitor is the engine that monitors documents over a period of time against the user-defined business rules.
Business Rule Workbench	It is used to define a business rule.
Customer Relationship Escalation	A customer relationship escalation is an escalation document that escalates multiple support requests, defects, or tasks.
Defect	A defect is a document that tracks product problems and resolutions. A defect can be escalated without an associated service request. It is escalated in the HTML-based application Oracle Quality Online (OQO), formerly known as the Defect Management System.
Escalation	An escalation is the increase in the focus and process required to successfully complete a task and its associated components such as documents.
Owner	An escalation owner is the employee or group resource responsible for managing an escalated task or document.
Escalation Plan	An escalation plan is a series of follow up tasks that are attached to the escalation document.
Escalation Territory	An escalation territory is a territory that provides the resources responsible for managing an escalation.
Reference Document	A reference document is a document that is linked to an escalation document. For example, a service request (number 9229) is escalated to Jane Doe in escalation document (number 11749), This service request (number 9229) is a reference document.
Reference Type	A reference type specifies whether or not a reference document is escalated or used to provide additional information.
Service Request	A service request is a document that tracks information about a customer’s product and service problems.
Workflow	Workflow defines what actions occur if a business rule is violated. There are two workflows: Oracle Workflow and the BRM workflow.
Workflow Attributes	Workflow attributes set the variable parameters. They control the behavior of the workflow.

Table 36–2 Escalation Management Terms and Definitions

Term	Description
Workflow Monitor	Workflow Monitor is a Java-based tool used for administering and viewing workflow process.

Overview of Using Oracle Escalation Management

This chapter covers the following topics:

- [Accessing the Oracle Escalation Manager Interface](#)
- [Summary of Oracle Escalation Management Tasks](#)

37.1 Accessing the Oracle Escalation Manager Interface

There are several ways to access Escalation Manager. Typically, you would access Escalation Manager through a task or service request that you want to escalate. In general, service requests, tasks, and defects can be escalated. Use Oracle Quality Online (OQO), formerly known as Defect Enhancement Management System (DEMS) to create and escalate a defect.

- Log in using the CRM Administrator responsibility, for setting up tasks. Use the Forms-based Task module to escalate a task.
- You can access Escalation Manager through a task, defect, or service request that you want to escalate.

Administrative Path

To access the administrative tasks indicated through the Forms-based CRM Administrator responsibility, select **Task and Escalation Manager > Setup**.

Escalation administrative tasks are defined in the Form from **Define Escalation Reason to Define Reference Type**.

General Usage Path

Search for a task (or defect or service request) then use the following navigation path to invoke Escalation Manager:

- From a stand-alone task in the Forms-based Task Manager: **Tools > Manage Escalation**
- From a service request: **Tools > Request Escalation**
- From a service request: **Tools > Task Escalation**
- From the CRM Administrator responsibility: **Task and Escalation Manager > Manage Escalations**
- From a defect HTML window, select the Escalation button for defect escalation. See Oracle Quality Online documentation for details on how to escalate a defect from the application.

37.2 Summary of Oracle Escalation Management Tasks

Use Oracle Escalation Management to perform the following types of tasks:

- [Chapter 38, Reactive Escalations: Escalation Manager](#)
- [Chapter 39, Proactive Escalations: Business Rule Monitor](#)
- [Chapter 40, Using Escalation Manager](#)

Overview of Reactive Escalations: Escalation Manager

This chapter covers the following topics:

- [What is the Escalation Manager](#)
- [Workflow Notifications](#)
- [Escalation Territories](#)

38.1 What is Escalation Manager?

You can manually escalate a business problem to the appropriate level where it can be solved in Escalation Manager. It has a user interface (UI) where you can manage situations that require awareness and possible actions. An escalation is managed either by creating an escalation document, or by assigning an escalation owner, or by defining the actions needed to resolve the escalation.

Example

Lorraine Abbott, a support agent for Vision Corporation, receives a call from Cindy Miller, a primary contact for Business World, complaining that their hardware problems are not completely fixed. Lorraine finds the service request, creates an escalation document, and also reassigns herself as the owner for this document. In addition, Lorraine can also utilize the following features in this escalation document:

- Escalation level: Specify the degree of urgency for this escalation.
- All relevant documents: Link the relevant documents to this escalation, such as link the service request in this document.

- Relevant contacts: Identify the employee and customer contact information, such as Lorraine Abbott and Cindy Miller.
- Notes: A note can be created about Lorraine's contact number if the assignee needs to contact her while she is on vacation.
- Tasks: A task can be created, such as a update meeting with her manager.

38.2 Workflow Notifications

Notifications are an integral part of the Escalation functionality. Oracle Workflow is used to process and deliver the notifications regarding the escalation activity.

Notifications are sent for the following reasons:

- Escalation creation
- Escalation status changes
- Escalation owner assignment changes
- Escalation level changes
- Escalation target date changes

Notifications are sent to people (employees or customers) that are identified on the Contacts tab, and for which the Notify Check Box is selected.

Typical recipients include:

- Owner of the object (Service Request, Task, or Defect) that is being escalated
- Human Resource (HR) manager of the owner of the Escalation document
- Owner of the Escalation document

38.3 Escalation Territories

An escalation territory provides the resources responsible for managing escalations. Use Escalation territories to define the escalation path with appropriate resources which the escalation owner identified for the territory in the event of exceptions. In case of automatic assignment by using an escalation territory, the Assignment Manager is used in conjunction with the Territory Manager. The escalation can be automatically assigned to an owner if the escalated document (such as a service request, tasks, or defect) has an escalation territory defined.

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

- a. A service team assigned to a repair does not take action within five business days, so now that repair can be assigned automatically to another group.
- b. A service engineer cannot successfully resolve a request within a certain time frame, which is set up in the Business Rule Monitor (BRM), so now the service request will be automatically escalated to another resource.

Ensure that you have a resource assigned to an Escalation territory. The Escalation territory can be a catch all for all escalations.

38.4 Escalation Owners and Owner Types

Each escalation must be assigned an owner and this owner must be a specified owner type.

38.4.1 Owners

An escalation owner is a person who manages an escalated task, or document. Once a task or document is escalated, the responsibility for either one is transferred from the original owner to the escalation owner. For example, a support service center can assign a defect to an employee resource, John Smith. If John Smith fails to correct the defect the support service center can escalate the defect and assign another employee resource, Rhonda Abbott as its escalation owner. When this occurs, the original owner, John Smith is no longer responsible for the defect.

38.4.2 Owner Types

An escalation owner can be an employee resource or a group resource. When an escalation is owned by a group, any member of that group can manage the escalation.

Overview of Proactive Escalations: Business Rule Monitor

This chapter covers the following topics:

- [What is a Business Rule?](#)
- [What is the Business Rule Monitor?](#)
- [Workflow and Workflow Attributes](#)
- [Resource Types](#)
- [General Tips for Defining Rules](#)

39.1 What is a Business Rule?

A business rule is a user-defined condition. When the condition is not met, the rule triggers a workflow process. The process is enforced by the business rule owner.

A business rule can be as simple as "A service request cannot be left open for more than two days." This rule can be defined according to an organization's needs or an agreement between its customers.

Example

Vision Corporation, a service organization, is eager to provide efficient customer service, so the Service Department Director for Vision Corporation, defines a business rule based on the company's goal. This rule is that if a task with a high priority is open for four hours, then the task owner should be notified to proactively manage potential issues. Effective immediately, the director is the owner of this business rule as he is responsible for any future updates and necessary confirmation.

Additional examples include:

- A service request is assigned within half an hour. Otherwise, the owner of this request receives a warning notification.
- A task with a high priority is closed within two days. Otherwise, a manager investigates why it cannot be done within that time frame.
- An open defect is closed within three business days. Otherwise the assignee should meet with her manager one day prior to the due date to discuss possible solutions to this defect.

39.2 What is the Business Rule Monitor?

The Business Rule Monitor (BRM) provides a User Interface (UI) and functionality that an organization uses to proactively manage escalations. It consists of two components:

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

The BRM module integrates with Oracle Workflow to provide possible action taken if the condition defined in the rules is not met.

Note: The functionality of BRM is not limited to only detect potential problems. It can also be used as a reminder of positive reinforcement, such as to remind employees of a company's annual events or an employee's birthday.

39.3 Workflow and Workflow Attributes

When defining your rules, you must also specify the workflow information for actions that can occur when the rule is violated. There are four seeded workflow processes:

- [Notification Only](#)
- [Create a Task Only](#)
- [Notification and Create Task](#)
- [Escalated Object](#)

39.3.1 Notification Only

An Oracle Workflow notification is sent. The person who receives this notification selects from the Value field in the Workflow Attributes window. Click the "..." button to display this attributes window.

39.3.2 Create a Task Only

An automated escalation task is created. This is generated through the seeded Automated Escalation Template Group for Task Manager (Service Request or Defect Management.) The owner and assignee of this task select from the Value field in the Workflow Attributes window.

39.3.3 Notification and Create Task

In addition to the sent workflow notifications, an automated escalation task is also created. The owner and assignee of this task are specified in the Value field.

39.3.4 Escalated Object

An escalated document is created. The owner of this escalated document can be specified in the Value field. The selection in the Value field can be a document owner, the document owner's Human Resource manager, an escalation territory primary contact, or the business rule owner. If this value is not specified, it defaults to the business owner.

Note: The selection in the Value field can be document owner, document owner's HR manager, escalation territory primary contact, and business (rule) owner. If this value is not specified, it defaults to the business owner.

If the unassigned option is selected in the Automated Escalation Notification Task Assignee Role field in the Workflow Attributes window, then the task that is created has no assignee, but it has an owner specified because you cannot find the unassigned option from the List of Values in the task owner role field.

39.3.5 Workflow Attributes

In addition to the Workflows which provide standard escalation activities, each of the seeded Workflow processes has its own Workflow attributes, which can be

accessed in the Business Rule Workbench window. The value chosen for each attribute is saved as part of the Business Rule and allows you to control the behavior of the escalation activity for that rule.

Workflow attributes in the Business Rule Monitor seeded workflows are specific to the workflow process. The following table lists each seeded workflow process, the attributes it has, the meaning of that attribute, and possible values. Attributes are the same regardless of whether or not the Workflow is for a task, defect, or service request.

Table 39–1 Workflow Attributes Defined

Workflow Name	Attribute	Meaning	Possible Values
Send Notification	Automated Escalation Notification Role	Send the notification to the person who fulfills the role indicated by the value selected.	<ul style="list-style-type: none"> ■ Business Owner ■ Document Owner ■ Document Owner’s HR Manager ■ Escalation Territory Primary Contact
Create Task	Automated Escalation Notification Task Assignee Role	Assign the task to the person who fulfills the role indicated by the value selected.	<ul style="list-style-type: none"> ■ Business Owner ■ Document Owner ■ Document Owner’s HR Manager ■ Escalation Territory Primary Contact ■ Unassigned
Create Task	Automated Escalation Notification Task Owner Role	The task owned by the person who fulfills the role indicated by the value selected.	<ul style="list-style-type: none"> ■ Business Owner ■ Document Owner ■ Document Owner’s HR Manager ■ Escalation Territory Primary Contact
Create Task	Automated Escalation Task Template	The template that is used to create the task.	Any Task Template

Table 39–1 Workflow Attributes Defined

Workflow Name	Attribute	Meaning	Possible Values
Send Notification and Create Task	Automated Escalation Notification Role	Send the notification to the person who fulfills the role indicated by the value selected.	<ul style="list-style-type: none"> ■ Business Owner ■ Document Owner ■ Document Owner’s HR Manager ■ Escalation Territory Primary Contact
Send Notification and Create Task	Automated Escalation Notification Task Assignee Role	Assign the task to the person who fulfills the role indicated by the value selected.	<ul style="list-style-type: none"> ■ Business Owner ■ Document Owner ■ Document Owner’s HR Manager ■ Escalation Territory Primary Contact ■ Unassigned
Send Notification and Create Task	Automated Escalation Notification Task Owner Role	The task owned by the person who fulfills the role indicated by the value selected.	<ul style="list-style-type: none"> ■ Business Owner ■ Document Owner ■ Document Owner’s HR Manager ■ Escalation Territory Primary Contact
Send Notification and Create Task	Automated Escalation Task Template	The template that is used to create the task.	Any Task Template
Escalate Object	Automated Escalation Document Owner Role	The escalation document owned by the person who fulfills the role indicated by the value selected.	<ul style="list-style-type: none"> ■ Business Owner ■ Document Owner ■ Document Owner’s HR Manager ■ Escalation Territory Primary Contact

39.4 Resource Types

A document owner can be of any resource type other than an employee resource. Some examples of other types of document owners are: parties or partners and supplier contacts. Since the automated escalation can happen to the document

owner of any resource type, the person who will receive the notifications is determined as follows:

Document Owner

The Document Owner is selected as the value in the workflow attributes.

- If the document owner type is an employee resource, then the document owner will receive notifications.
- If the document owner resource is of any other type, then the primary contact with the employee resource type in the escalation territory is used. If there is no resource that satisfies this criteria, then the primary contact with the employee resource type in the catch-all territory is used. Again, if there is no resource that satisfies this criteria, then the Business Rule Owner is used because the business rule owner is guaranteed to be an employee resource.

Document Owner's HR Manager

The Document Owner's HR Manager is selected as the value.

- If the document owner is an employee resource, then the notification is sent to the HR manager of that resource. If there is no resource that satisfies this criteria, then the primary contact with the employee resource type in the escalation territory is used. Otherwise, the primary contact with the employee resource type in the catch-all territory is used, and then the Business Rule Owner is selected.
- If the document owner resource is a group resource, then the notification is sent to the first employee resource within the resource group who has a manager. If there is no resource that satisfies this criteria, then the primary contact with the employee resource in the escalation territory is used. Otherwise, the notification is sent to the primary contact with the employee resource in the catch-all territory, and then the Business Rule Owner.
- If the document owner resource is of any other type other than employee or group resources, then the same rule is used: the primary contact with the employee resource type in the escalation territory, then the primary contact with the employee resource type in the catch-all territory, and then the Business Rule Owner.

Escalation Territory Primary Contact

The Escalation Territory Primary Contact is selected as the value.

- The notification is sent to the primary contact with employee resource in the escalation territory.
- If there is no resource that satisfies this criteria, then the notification is sent to the primary contact with employee resource in the catch-all territory. Otherwise, the Business Rule Owner receives the notification.

39.5 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.

Guidelines

Refer to the chapter "Verify the Implementation" to see additional details on troubleshooting the Business Rule Monitor.

Using Escalation Manager

This chapter covers the following topics:

- [Creating Escalations](#)
- [Creating a Document Whose Owner is a Group](#)
- [Managing a Service Request Escalation](#)
- [Managing a Task Escalation](#)
- [Managing a Defect Escalation](#)

40.1 Creating Escalations

An escalation is initiated by a person using a service channel (telephone, web, or e-mail). An escalation can also be initiated by the system based on pre-defined rules that are established to monitor business situations.

To initiate an escalation, you must:

- Accept a request for an escalation
- Review the situation
- Create an escalation document
- Notify the involved parties (this is performed automatically)

An escalation request can be initiated on behalf of a customer, an employee, or other involved party. Perform the following steps to create an Escalation document.

Prerequisites

A task, defect, or service request exists.

Responsibility

CRM Administrator

Navigation

Navigate to the Escalations window.

Steps

1. If the Escalation Manager is launched directly from a service request, task, or defect, then the customer information should be populated automatically. Otherwise, manually enter it. If you open the Escalation Manager as a stand-alone application, from the CRM Administrator responsibility, select **Task and Escalation Manager > Manage Escalations**.

Note:

- Status, reason, escalation level, and reference type information is set up during the implementation process.
 - You must have the appropriate information entered into the Reference Documents and Contacts tab before you can assign an owner.
-
-

2. Enter the customer's name and number.
3. Select the Reference Documents tab.
 - a. Enter all relevant information if it has not already been automatically populated in the Type field.
 - b. Enter all relevant information if it has not already been automatically populated in the Document and Details fields.
4. Select the **Contacts** tab.
 - a. Enter all contacts (customer or employee).
 - b. Specify if the contact is a requester or the escalation is for notification purposes.

In addition to the owner of the escalation document, recipients can include the Human Resource manager of the owner of the escalation document, the owner of the escalated object, and the selected employee and customer contacts.

5. (Optional) Select the Audit tab to view all the changes once you are finished.

6. Click **Assign**, in the Escalation Owner Information region, to assign ownership. You can assign either automatically or manually.
 - **Automatic Assignment**

An owner can be automatically assigned by using the Assignment Manager if the escalated source document is assigned to a resource defined in a territory and this territory has an escalation territory attached to it.
 - **Manual Assignment**

If the document does not contain a territory, or if you want to override the recommended escalation resource by the escalation territory, then either select an owner from the List of Values or use the Assignment Manager to assist in owner selection.

See Also

[Managing Different Types of Escalations](#)

40.2 Creating a Document Whose Owner is a Group

Not only an individual can be a document owner. Perform the following steps to define an owner of an escalated document whose owner is a group.

Prerequisites

A group must exist. If it does not, then define one in Resource Manager.

Responsibility

CRM Administrator

Navigation

Navigate to the Find Tasks window.

Steps

1. Click **New** to create a new task.
2. Enter a name in the Name field.
3. In the Owner Type field, choose Group Resource from the List of Values (LOVs).
4. In the Owner field, select a previously created owner.

5. Save the Task.

40.3 Managing Different Types of Escalations

The following sections describe the process of managing different types of escalations:

- [Managing a Service Request Escalation](#)
- [Managing a Task Escalation](#)
- [Managing a Defect Escalation](#)

40.4 Managing a Service Request Escalation

A service request is a document that tracks information regarding a customer's product and service problems. Perform the following steps to manage a service request escalation.

Prerequisite

A service request exists in the system.

Responsibility

CRM Administrator

Navigation

Navigate to the View Service Request window.

Steps

1. Query the existing service request.
2. Verify that the service request has never been escalated. In the Request Information area of the header, verify that "Never Escalated" appears in the Escalation Level field.

You may have to scroll down in the Request Information header region to see the Escalation Level field.

3. From the Tools menu, choose **Request Escalation**.

The customer and account information fields are automatically populated, along with the reference document information (service request).

4. Select or enter the following information:
 - a. A Status
 - b. A Reason
 - c. Target date
 - d. The escalation level
5. Assign the escalation to yourself or another existing resource using one of the two methods listed:

Manual Assignment

- a. Select a resource from the LOV.

Automatic Assignment

- a. Click **Assign** to choose an escalation owner from the Assignment Manager.
- b. Select the **Assisted Assignment** option and select **Territories**.
- c. Click **Search**.

Note: Only click **Search** in the Selection Criteria region. Leave the other fields in the default settings.

The resources from the Escalation Territory of the escalated document become visible. If there are no Escalation Territories setup, then the resources from the Catch All territory are in view.

6. Select the resource name and click **OK**.
7. Enter an escalation summary.
8. Enter the name of the customer or employee contact (requester), and select the **Requester** check box.

There can be more than one contact, but only one requester.

 - a. (Optional) Enter any additional contact points.
 - b. (Optional) Add more reference documents to the escalation in the Reference Documents tab.
9. Save the escalation, and make a note of the escalation number.
 - a. (Optional) Click **Notes** to create a note about the escalation.

- b. (Optional) Click **Tasks** to create a follow up task for the escalation.
10. Close the Escalation window to return to the Service Request window.
Re-query the service request to view the updated escalation level.

40.5 Managing a Task Escalation

Perform the following steps to manage a stand-alone task escalation.

Prerequisite

A task exists in the system.

Responsibility

CRM Responsibility

Navigation

Navigate to the Task window.

Steps

1. Find the task to be escalated.
2. From the Tools menu, choose **Manage Escalation**.
3. Verify that the task has never been escalated.
If the task has already been escalated, then the escalation document will automatically appear in the escalation window.
4. Enter the following information:
 - a. A Status
 - b. A Reason
 - c. Target date
 - d. The escalation level
5. Assign the escalation to yourself or another existing resource using one of the two methods listed:

Manual Assignment

- a. Select a resource from the LOV.

Automatic Assignment

- a. Click **Assign** to choose an escalation owner from the Assignment Manager.
- b. Select the **Assisted Assignment** option and select **Territories**.
- c. Click **Search**.

Note: Only click **Search** in the Selection Criteria region. Leave the other fields as defaulted.

The resources from the Escalation Territory(s) of the escalated document(s) become visible. If there are no Escalation Territories set up, then the resources from the Catch All territory display.

- d. Select the resource name and click **OK**.
6. Enter an escalation summary in the Escalation Summary field.
7. Enter the name of the customer or employee contact (requester), and select the **Requester** check box.
There can be more than one contact, but only one requester.
8. (Optional) Enter any additional contact points.
9. Save the escalation and query the escalated task to view the updated escalation level.

40.6 Managing a Defect Escalation

A defect is a document which tracks product problems and resolutions. A defect can be escalated without an associated service request. Any employee can escalate a defect from the HTML-based Oracle Quality Online (OQO) application.

See the OQO documentation for the procedures on escalating a defect.

Part VIII

User Management

This part of the Oracle Common Application Components User's Guide contains the following chapters:

- [Working with Oracle User Management](#)

Working with Oracle User Management

This chapter covers the following topics:

- [Introduction](#)
- [Logging into User Management](#)
- [Pending Approvals](#)
 - [Approving Pending User Requests](#)
 - [Viewing Your Notifications](#)
 - [Approving Requests from the Notification Window](#)
- [User Maintenance](#)
 - [Viewing All Users](#)
 - [Searching for a User](#)
 - [Creating a User](#)
 - [Editing a User's Details](#)
 - [Deleting a User](#)
 - [Defining a User's Roles](#)
 - [Defining a User's Account](#)
 - [Defining a User's Enrollment](#)
- [What's New in This Release](#)

41.1 Introduction

The Users tab in the System Administration Console provides functionality for setting up the User Management framework and for registering users. The Registration menu in the main navigation bar enables administrators to manage approvals, and to setup, modify, or delete users. This chapter contains instructions for performing these steps. The Setup menu in the main navigation bar enables administrators to implement User Management by creating and managing approvals, enrollments, user types, and templates. Instructions for implementing User Management including the steps performed in the Setup Menu of the Users tab are located in the Oracle Common Application Components Implementation Guide.

41.2 Logging into User Management

The following modules use User Management to register users:

- Oracle iStore
- Oracle iSupport
- Oracle Partners Online

Perform the following steps to log into the System Administrator Console.

Note: All fields marked with an asterisk are required.

Prerequisites

- You must have a valid username and password.
- You must have the appropriate administrative responsibility such as the CRM HTML Administration responsibility or CRM Primary User.

Steps

1. Navigate to the Login window.
2. Enter your username.
3. Enter your password and click **Go**.

41.3 Approving Pending User Requests

Pending user account requests must be approved by an approver, a system administrator or the primary user for an organization.

The following sequence of events occurs if notifications are set to time out after a specified amount of time in the JTF_UM_APPROVAL_TIMEOUT profile option:

- If the time-out period passes without an approval or rejection, a reminder is sent to the same approver.
- If the approver still does not respond, the request is sent to the next approver specified in the Approval Setup window.
- If the last approver does not respond, or there are no more approvers on the list, then the notification is sent to the user specified in the JTF_UM_APPROVAL_OWNER profile option.

Perform the following steps to accept or reject user approval requests, edit user information, and assign accounts to the user.

Note: Any pending user requests submitted before User Management was applied do not appear in the Pending Request window. Instead, you must click on the link in the window to respond to these requests.

Prerequisites

You must be an approver, system administrator, or primary user of a company with the appropriate permissions, to approve a request.

Navigation

Navigate to **Users > Registration > Pending Approvals**

Steps

1. (Optional) Select the Delegation check box next to the user to provide the user with delegation ability. The Delegation column is only visible to users with the appropriate role.
2. (Optional) Review the user's details before accepting or rejecting Click the username in the Username column to review the request before accepting or rejecting it.

3. Select the check box next to the user and click **Accept** or **Reject** to answer the request from this window

A notification is sent to the user when the last approver from the approval definition approves it.

41.4 Viewing Your Notifications

A merchant administrator, system administrator, or a primary user for an organization can approve or reject a users request except when they are generated by a Workflow approval process. Whether the request is granted or rejected, the user receives a notification. Perform the following steps to view your user requests.

Prerequisites

You must set up your Personal Home Page (PHP) and have the workflow and self service responsibilities to receive notifications.

Steps

1. Log in as the System Administrator.
2. Set up your Personal Homepage (PHP) to show workflow notifications.
3. Select the Main Menu tab.
4. Click **Workflow**.
5. Click **View Notifications**.

Your notifications appear in the Worklist window.

See Also

- [Approving Requests from the Notification Window](#)

41.5 Approving Requests from the Notification Window

Note: When an approver receives a registration request in their Notifications, they have the option to reassign it. However, it is the approvers responsibility to confirm that the person to whom you are reassigning the request has the correct approver responsibilities and permissions. The list provided includes application users that may or may not have the appropriate responsibilities to approve user requests.

For user type approval, the system administrator receives a URL in their notifications. The approver follows the URL to approve or reject the request. Perform the following steps to approve or reject a user requests.

Prerequisites

You must set up your Personal Home Page (PHP) and have the workflow and self service responsibilities to receive notifications.

Steps

1. Log in as the System Administrator.
2. Set up your Personal Homepage (PHP) to show workflow notifications.
3. Select the Main Menu tab.
4. Click **Workflow**.
5. Click **View Notifications**.

Your notifications appear in the Worklist window.

6. Click the link to respond to the request.
The Notification Details window opens.
7. Review the users details and click **Approve** to accept the request or click **Reject** to deny the request.
8. To reassign the request:
 - a. Click **Reassign**.
 - b. Enter the Approvers name or click the Up arrow icon to search for an approver.

You are responsible for verifying

- c. Select the **Delegate Authority for responding to this notification** option button to send the request to an approver who transfers ownership of this notification
- d. Enter any comments you want the new approver to view.
- e. Click **OK**.

41.6 Viewing All Users

Perform the following steps to view all users in the system.

Note: If you are the primary user for your organization, you will only be able to view users for your company.

Prerequisites

You must be the merchant administrator, system administrator, or the primary user of a company with the appropriate permissions, to view all users.

Steps

1. Log in to the CRM System Administrator Console as a system administrator or primary user.
2. Select the Users tab.
3. Click **Registration** on the main navigation bar, if it is not already selected.
4. Click **User Maintenance** on the side navigation bar.

The Users window opens.

5. Enter a minimum of three characters into to the search field.
The "%" and "_" (underscore) symbols are wildcards.
6. Click **Go**.

All users that match your search criteria are listed.

See Also

- [Searching for a User](#)
- [Creating a User](#)

- [Editing a User's Details](#)
- [Deleting a User](#)
- [Defining a User's Roles](#)
- [Defining a User's Account](#)
- [Defining a User's Enrollment](#)

41.7 Searching for a User

Perform the following steps to search for a user.

Note: If you are the primary user for your organization, you are only able to query users for your company.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to search for a user.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Registration** on the main navigation bar, if it is not already selected.
4. Click **User Maintenance** on the side navigation bar.

The Users window opens.

5. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.
6. Enter a minimum of three characters into to the search field.
The "%" and "_" (underscore) symbols are wildcards.
7. Click **Go**.

A list of search results appears in the window.

Note: To search for all users in the system, enter three spaces followed by "%". This search may take a long time.

See Also

- [Viewing All Users](#)
- [Creating a User](#)
- [Editing a User's Details](#)
- [Deleting a User](#)
- [Defining a User's Roles](#)
- [Defining a User's Account](#)
- [Defining a User's Enrollment](#)

41.8 Creating a User

Certain types of users may only be created by a system administrator. For example, a system administrator creates primary users or other system administrators.

Oracle User Management ships out-of-the-box the following user types:

- Users who represent an organization that is already registered, and want to register themselves as a user.
- Users who represent themselves only (for individuals).
- Users who want to register their organization.

Perform the following steps to create a new user.

Note: Do not create user names starting or ending with any special characters, such as %, _, or *.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to create a new user.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.

2. Select the Users tab.
3. Click **Registration** on the main navigation bar, if it is not already selected.
4. Click **User Maintenance** on the side navigation bar.
The Users window opens.
5. Click **Create**.
The User Registration window opens.
6. Select the type of user that you want to create.
7. Enter information about the organization (if you are creating a user type associated with an organization), and click **Next**.
This information includes the name, location of the organization, and relevant telephone numbers.
8. Enter the user's information into the fields provided and click **Next**.
This information includes name and contact information, as well as a password.
9. Select available enrollments as appropriate.
10. Enter supporting information, depending on the enrollment(s) that you selected, and click **Next**.
The User Registration Summary page opens and displays a confirmation number.
11. Click **Continue** to return to the main User Maintenance page.

See Also

- [Viewing All Users](#)
- [Searching for a User](#)
- [Editing a User's Details](#)
- [Deleting a User](#)
- [Defining a User's Roles](#)
- [Defining a User's Account](#)
- [Defining a User's Enrollment](#)

41.9 Editing a User's Details

Perform the following steps to edit a user's information.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to edit a user's details.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Registration** on the main navigation bar, if it is not already selected.
4. Click **User Maintenance** on the side navigation bar.
The Users window opens.
5. If you do not need to search for the user, then skip to step 7.
6. If you need to search for the user, then:
 - a. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.
 - b. Enter a minimum of three characters into to the search field.
The "%" and "_" (underscore) symbols are wildcards.
 - c. Click **Go**.
A list of search results appear in the window.
7. Click the username.
The User Details page opens.
8. Edit fields as desired.
Fields marked with an asterisk are mandatory.
9. (Optional) Click **Roles** to view or update the roles associated with this user.
See [Defining a User's Roles](#) for details.
10. (Optional) Click **Enrollments** to view or update the enrollments associated with this user.
See [Defining a User's Enrollment](#) for details.

11. (Optional) Click **Default Responsibility** to view or update the default responsibility associated with this user.
12. (Optional) Click **Accounts** to view or update the accounts associated with this user.
See [Defining a User's Account](#) for details.
13. click **Update** when you have completed your modifications.

See Also

- [Viewing All Users](#)
- [Searching for a User](#)
- [Creating a User](#)
- [Deleting a User](#)

41.10 Deleting a User

Perform the following steps to delete a user.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to delete a user.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Registration** on the main navigation bar, if it is not already selected.
4. Click **User Maintenance** on the side navigation bar.
The Users window opens.
5. If you do not need to search for the user, then skip to step 7.
6. If you need to search for the user, then:
 - a. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.
 - b. Enter a minimum of three characters into to the search field.

The "%" and "_" (underscore) symbols are wildcards.

- c. Click **Go**.

A list of search results appear in the window.

7. Select the check box which corresponds to the user you want to delete.

8. Click **Delete User**.

The Delete User window opens.

9. Deselect any user names that you do not wish to delete at this point.

10. Click **Delete**.

The selected user is deleted from the system. If successful, a confirmation message is generated. The system also attempts to send a notification to the email address associated with that user.

See Also

- [Viewing All Users](#)
- [Searching for a User](#)
- [Creating a User](#)
- [Editing a User's Details](#)
- [Defining a User's Roles](#)
- [Defining a User's Account](#)
- [Defining a User's Enrollment](#)

41.11 Defining a User's Roles

Perform the following steps to define a user's role information.

Note: If you are the primary user of an organization, you are not able to define their role from this window.

Prerequisites

You must be the merchant administrator or a system administrator, of a company with the JTF_SECURITY_ASSIGN_ROLE permission to define a user's roles.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Registration** on the main navigation bar, if it is not already selected.
4. Click **User Maintenance** on the side navigation bar.
The Users window opens.
5. Find the user who's role you want to define.
6. Click the username.
The User Details window opens.
7. Click **Roles** to edit the user's role information.
The User- Role Mapping window opens.
8. Select the name of a role in one list and click > or < to move it to the other list.
You can hold down the [CTRL] key and use your mouse to select multiple roles.
The administrator can only assign roles that they are assigned themselves.
9. Repeat step 8 as desired.
10. (Optional) Click >> to move all Available Roles to the Assigned Roles list, or click << to move all Assigned Roles to the Available Roles list.
11. Click **Update** to modify the information or click **Restore** to reset the original values in the window.

See Also

- [Viewing All Users](#)
- [Searching for a User](#)
- [Creating a User](#)
- [Editing a User's Details](#)
- [Deleting a User](#)
- [Defining a User's Account](#)
- [Defining a User's Enrollment](#)

41.12 Defining a User's Account

Perform the following steps to define a user's account information.

Note: If the user is not defined as a user type in the user management framework, then you can not define the account from this window.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to define a user's account.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Registration** on the main navigation bar, if it is not already selected.
4. Click **User Maintenance** on the side navigation bar.
The Users window opens.
5. Find the user who's account you want to define.
6. Click the username.
The User Details window opens.
7. Click **Accounts** to view or modify the account(s) associated with this user.
The Accounts window opens.
8. Perform one of the following actions:
 - Select the check box next to an account that you want to assign to the user.
 - Enter a new account name in the account description field and click **Create**.
The new account is added to the table.
 - Deselect next to an account that you no longer want to assign to the user.
9. Select the account and click **Update**.

See Also

- [Viewing All Users](#)

- [Searching for a User](#)
- [Creating a User](#)
- [Editing a User's Details](#)
- [Deleting a User](#)
- [Defining a User's Roles](#)
- [Defining a User's Enrollment](#)

41.13 Defining a User's Enrollment

Perform the following steps to define a user's enrollment.

Note: If the user is not defined as a user type in the user management framework you are not able to define their enrollments from this window.

Note: If you are viewing your own enrollments, you have access to available enrollments, that you can register for, depending on your roles and responsibilities.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to define a user's enrollment.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.
The Users window opens.
4. Find the user who's role you want to define.
5. Click the username.
The User Details window opens.

6. To edit the user's enrollments, click **Enrollments**.
The User Enrollment Details window opens.
7. Select the checkbox next to the enrollments you wish to provide and click **Apply**. An individual user can sign up for enrollments. The administrator can also add, revoke, and review a user's pending enrollments.
8. To cancel enrollment, remove the selection for the enrollments you wish to remove and click **Apply**.
9. (Optional) To grant the user delegation capability select the checkbox in the Delegation column for the enrollment that you want the user to be able to delegate and click **Apply**.

Note: The Delegation column only appears if you have the appropriate role to grant delegations with enrollments.

See Also

- [Viewing All Users](#)
- [Searching for a User](#)
- [Creating a User](#)
- [Editing a User's Details](#)
- [Deleting a User](#)
- [Defining a User's Roles](#)
- [Defining a User's Account](#)

41.14 What's New in This Release

The following are new User Management features subsequent to the 11.5.8 release:

Flexible Address Fields

User Management contains flexible address fields that display the required address fields for different countries on the User Detail page, `jtfUserSummary.jsp`, 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

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.