

Oracle® Common Application Components

User's Guide

Release 11*i*

Part No. B12395-01

August 2004

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Glossary

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

Part No. B12395-01

Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

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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.

See Related Documents on page xv for more Oracle Applications product information.

Documentation Accessibility

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

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Related Documents

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 11i versions of those guides.

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

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

The following documents are related to installation or 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 explains how to define periodic and event alerts to monitor the status of your Oracle Applications data. Oracle Applications Developer's Guide This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the Oracle Applications User Interface Standards for Forms-Based Products. It also provides

information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

- Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

- 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 [OracleMetaLink](#)

- Oracle Manufacturing APIs and Open Interfaces Manual

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

- Oracle Order Management Suite APIs and Open Interfaces Manual

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

- Oracle Applications Message Reference Manual

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

- Oracle Common Application Components Implementation Guide

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

Training and Support

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

Support: From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Common Application Components working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

Introduction to Oracle Resource Manager

This chapter covers the following topics:

- Overview of the Oracle Resource Manager
- Oracle Resource Manager Integrations
- Terms and Definitions
- Resource Manager Rules for HTML

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?, page 1- 2
- What are Resources?, page 1- 2
- Understanding Roles, page 1- 3
- Understanding Groups, page 1- 5
- Determining Group Hierarchy, page 1- 6
- Understanding Teams, page 1- 6
- What is a Salesperson?, page 1- 6
- How are the Different Resource Names Fields Used?, page 1- 7

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.

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.

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.
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.

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.

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.

Example of Roles, Role Attributes, and Role Types

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

See Also

- Understanding Groups, page 1- 5
- Understanding Teams, page 1- 6

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.

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.

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.

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 resource you can create, and not import, is a salesperson in HTML.

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

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.

Terms and Definitions

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

Resource Manager Terms and Definitions

Term	Description
Employee	An employee is a person who has been hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).
Resource Manager	A single place for defining, accessing, and maintaining all CRM and ERP resources.
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.
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	Within a category in Skills Management, there could be numerous problems. A resource can be rated individually for each of those problems. Problems can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.

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: • 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

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 direct's 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.
 - The UI is available as an option in the tool bar from the Customer Service responsibility in the Service Request form.

Overview of Using Oracle Resource Manager

This chapter covers the following topics:

- Accessing Oracle Resource Manager Interface
- Summary of Oracle Resource Manager Tasks

Accessing Oracle Resource Manager Interface

The Resource Manager can be called from other applications. The HTML version of Resource Manager is accessed from other applications or modules by navigating to the **Resources** tab. Therefore the responsibilities and navigation path will vary. All of the Resource Manager user functions described in this book can also be performed by administrators that have the Resource Self Service Administration responsibility. The following tables describes how you can access the Resource Manager:

Resource Manager Navigation Paths

Description	Responsibility	Navigation Path
The Standalone Forms-based Resource Manager	• CRM Administrator or • CRM Resource Manager responsibility	Select Resource Manager in the Navigator window.
The Standalone 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.
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.

Summary of Oracle Resource Manager Tasks

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

- Chapter 3, Managing Employee Resources, page 3- 1
- Chapter 4, Managing Group Resources, page 4- 1
- Chapter 5, Searching for Resources, Groups, and Teams, page 5- 1

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

Viewing 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.

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab and click the appropriate subtab depending on the category with which the resource information is associated. Categories include:
 - Employees
 - Parties
 - Partners
 - Supplier contacts
2. You can also view the following details by clicking your resource name:
 - Picture (if available)
 - Phone/Email
 - Work Address (visible to employees only)
 - Salesperson Details

- Service (visible to employees only)
- Active Roles
- Group Membership

Note: Some information imported from HRMS such as Business Group and Work Fax cannot be updated.

See Also

- Defining Your Personal Information, page 3- 2
- Viewing Your Organizational Structure, page 3- 2

Defining Your Personal Information

Only you or a resource administrator with the Resource Self Service Administrator responsibility can maintain your personal information. Your direct manager can view your personal information but cannot update it. Perform the following to define your personal information.

- Fields can only be updated if set by the administrator.
- If any changes to your personal information require prior management approval, then those changes will not appear until the appropriate manager grants approval for the changes. Changes that do not require management approval will appear upon completion.

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab and then click the **Employees** subtab.
2. Click the **Advanced Search** button, search for your resource name and then click the **Update** icon next to your resource name in the search results page.
3. Optionally modify the following and then click the **Update** button:
 - Resource Name
 - Service Information including Time Zone, Primary Language, Cost Per Hour, Support Site, and Secondary Language

See Also

- Viewing Your Personal Information, page 3- 1
- Viewing Your Organizational Structure, page 3- 2

Viewing Your Organizational Structure

Perform the following to view your organizational structure:

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab click the **Employees** subtab, and then click the **Advanced Search** button.
2. Click the **Organization** icon next to your resource name in the search results page.

See Also

- Viewing Your Personal Information, page 3- 1
- Defining Your Personal Information, page 3- 2

Defining Your Skill Rating

Using Skills Management, resources can maintain their skill ratings at descending levels from highest, which is broader, to lowest, which is more granular. Levels include:

- category (such as CRM or ERP)
- product name (1198 – Oracle Common Application Components),
- product component (JTF_RES)
- platform (Sun Server)
- problem code (such as fix server, install problem, or documentation problem).

Skill ratings are used by customer support teams to select the most qualified resource to assign to a service request. Skill ratings cascade in a hierarchical fashion in which the higher level elements, include the lower level ones. For example if you define a resource's skill rating for a category, but not a product, Resource Manager cascades the skill rating to include the product with the category. If you define the skill rating for the category and product, but not the component, then Resource Manager cascades the skill rating to include the category, product, and component. This behavior is dictated by the available options in the UI.

There are many different scenarios in which a resource's skill may be rated. Perform the following steps to rate the resource skill at the category level. Resources can also remove their skill ratings by selecting "Not Applicable" from the list of available skill levels.

- 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.

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab, click the appropriate subtab depending on the resource category with which your personal information is associated and then click the **Advanced Search** button. Categories include:
 - Employees
 - Parties
 - Partners
 - Supplier Contacts
2. Click the **Skills** icon next to your resource name in the search results page and then click the **Add New Skill** button.
3. Click the **Go** button next to the Category text field and then choose the category you want to use.
4. 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.

Note: You can choose to rate a category only by performing any of the following:

- choosing a category from the list of values
 - selecting a Skill Level
 - Choosing No Cascade option.
5. Click the **Go** button 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. If you selected a product in the preceding step then the name is not required.
 6. Click the choice you want to use.

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

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

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

3. 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 they 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.
8. Use the drop-down list to select your Skill Level. Options include: Not Applicable, Basic, Functional, Experienced, Knowledgeable, Expert.

Note: If you wish to delete your skill rating, select **Not Applicable** from the drop-down list of skill levels.
9. Click **Create**.

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.

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab, click the appropriate subtab depending on the category with which the resource whose skill rating you wish to view is associated and then search for the resource using the Simple Search page. Categories include:
 - Employees
 - Parties
 - Partners
 - Supplier Contacts
2. Click the skills icon next to the resource in the search results page and then click the skills whose ratings you wish to view.

See Also

Defining Your Skill Rating, page 3- 3

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. Using this functionality, logged in users can set whether or not web service requests can be assigned to them. 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 Group Hierarchy
- Viewing Your Group Membership History

Viewing Your Group Membership Information

Perform the following steps to view your group membership information.

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab, click the appropriate subtab depending on the category with which your personal information is associated and click the **Advanced Search** button. Categories include:
 - Employee
 - Party
 - Partner
 - Supplier Contact
2. Click your resource name in the search results page and then click the **Group Membership** icon in the resulting page.

See Also

- Defining Your Group Membership Information, page 4- 2
- Defining Group Hierarchy, page 4- 3
- Viewing Your Group Membership History, page 4- 4

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. A member with these roles can add members to groups, add roles, add child groups to the groups hierarchy and perform these functions for any child groups. These roles do not enable a group member to create groups or change parent groups.
- 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

Steps

1. Navigate to the **Resources** tab, click the **Groups** subtab and then click the **Create** button.
2. Enter the required information in the Create Groups window including the name of the group and the date from which it becomes active.
3. Optionally enter the following information for the group:
 - **Description.** A description of the group.
 - **Parent Group.** If you are creating a child group, use the search tool to locate the parent group to which it belongs.
 - **Email.** The group's email address.
 - **Active To.** The date on which the group is no longer active.
4. Optionally configure group membership information:
 - **Add members.** To add group members, click the **Add Members** button and use the search window to locate and select the desired resources.
 - **Assign roles to members.** Click the search icon next to each group member to locate and assign it the appropriate role.

- **Dates active.** Use the Active To and Active From fields next to each member to optionally specify when it is active. The Active To field is required.
 - **Remove members.** Click the **Remove** icon next to each group member that you wish to remove.
5. Optionally specify the applications in which the group is used by clicking the **Used In** icon and entering the required information.
 6. Optionally specify any child groups that belong to this group by clicking the **Child Group** icon and entering the required information. A child group cannot have overlapping date ranges with its parent group.

See Also

- Viewing Your Group Membership Information, page 4- 1
- Defining Group Hierarchy, page 4- 3
- Viewing Your Group Membership History, page 4- 4

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.

The ability to define and maintain group hierarchy information is limited to users who are assigned the Admin or Manager role. In addition, the JTFRS: Group Update Access profile option must be set to None. The Admin or Manager role attribute can be identified by clicking 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.

- 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.

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab click the **Groups** subtab and search for the group for which you wish to define group hierarchy..
2. In the search results page, click the **Update** icon next to the group whose hierarchy you wish to define.
3. Click the **Child Groups** icon, click the **Add Another Row** button and search for the group that you wish to add as a child group.

4. Specify the active dates for the child groups. A child group cannot have overlapping date ranges with its parent group.
5. Add as many rows as required and then click the **Apply** button.

See Also

- Viewing Your Group Membership Information, page 4- 1
- Defining Your Group Membership Information, page 4- 2
- Viewing Your Group Membership History, page 4- 4

Viewing Group Hierarchy

The HTML version of the group hierarchy feature provides a more conceptual, graphical display of group hierarchy.

Responsibility

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

Steps

1. Navigate to the **Resources** tab, click the **Groups** subtab and search for the group whose hierarchy you wish to view.
2. In the search results page, click the **Hierarchy** icon next to the group whose hierarchy you wish to view.
3. You can optionally expand and collapse group hierarchy information by clicking the nodes in the Group Name column.

Viewing Your Group Membership History

Perform the following steps to view your group membership history.

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab, click the **Groups** subtab and search for the group whose membership you wish to view.
2. In the search results page, click the group name and then click the **Members** icon.

See Also

- Viewing Your Group Membership Information, page 4- 1

- Defining Your Group Membership Information, page 4- 2
- Defining Group Hierarchy, page 4- 3

Searching for Resources Groups and Teams

This chapter covers the following topics:

- Performing a Simple Search
- Performing an Advanced Search

Performing a Simple Search

The simple search tool is the default start page for resources of category Employee, Party, Partner, and Supplier Contact as well as for Groups and Teams. To perform a simple search, navigate to the **Resources** tab and then click the appropriate subtab for the resource category, group or team you wish to locate. Enter the resource, group, or team name in the search field and click the **Go** button.

Performing an Advanced Search

Perform the following to launch an advanced search for resources, groups, or teams:

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

Responsibility

CRM Application Foundation User

Steps

1. Navigate to the **Resources** tab click the appropriate subtab depending on the resource category, group or team you wish to locate and click the **Advanced Search** button. Categories include:
 - Employees
 - Parties
 - Partners
 - Supplier Contacts
 - Groups
 - Teams

2. Enter the appropriate search criteria and click the **Go** button. Typically the advanced search feature includes several additional fields such as Manager, Email, or Active Dates.

Introduction to Oracle Common Application Calendar

This chapter covers the following topics:

- Overview of Oracle Common Application Calendar
- Understanding Oracle Task Manager in Oracle Applications Framework
- Understanding Oracle Calendar in Oracle Applications Framework
- Understanding Oracle Notes in Oracle Applications Framework

Overview of Oracle Common Application Calendar

In order to provide calendar functionalities that can effectively manage your daily activities generated by various Oracle E-Business Suite applications and provide a central place for resource schedules and time reservations, Oracle Common Application Calendar is developed based on Oracle Applications Framework, the standard HTML development and deployment platform for Oracle HTML Applications, to provide common look and feel. As a result, all components within Oracle Common Application Calendar including the Tasks, Notes and Calendar modules are developed using the Oracle Applications Framework to provide new sets of HTML user interfaces with new features in order for integrated applications, such as Oracle Sales Online or Customers Online, to uptake these features while re-building their functions.

Oracle Common Application Calendar allows you to reserve resources for appointments, tasks, and other business activities based on the resource availability. In addition, you can also view any scheduled appointments in personal calendar views, and add necessary notes or attachments to the scheduled activities.

For example, a sales manager tries to schedule a meeting with his team. He can check the availability of desired resources from calendar availability view. If any of the team members has schedule conflict for the meeting, he can contact the member directly by locating the e-mail and phone number from the availability view window. Relevant notes and attachments can be added to the appointment. Each meeting invitee can respond to the invitation by accepting or rejecting it. This accepted or declined appointment can be displayed in the calendar views along with other scheduled activities including open invitations and other events if desired.

Oracle Common Application Calendar Components

To accomplish the feature of using Oracle Common Application Calendar as a personal productivity tool, Oracle Common Application Calendar contains the following modules:

- Tasks
- Calendar
- Notes

Tasks

Task Manager provides methods for quantifying, responding to, and managing units of work generated by Oracle E-Business Suite applications. Using the Tasks features, Oracle Common Application Calendar allows you to create a contextual task for a source object or a personal todo task through an integration application, such as Oracle Sales Online or Customers Online, and assign resources to the task based on resource availability. Task Manager developed for Common Application Calendar is based on existing task concepts with some enhancements.

See: Understanding Oracle Task Manager, page 6- 3 .

Calendar

The Calendar module which is one of the essential components for the Common Application Calendar in helping people manage their daily activities, appointments, and other calendar events generated by various Oracle E-Business Suite applications. Using these features, you can create a single or a repeating appointment, invite resources based on their availability, accept or reject appointment invitations, and view scheduled activities through personal calendar daily view.

Additionally, you can customize personal calendar preferences by setting default and view preferences.

See: Understanding Oracle Calendar, page 6- 4 .

Notes

The Notes module provides a quick and easy way to enter any information for a business object. Using the Notes features, Common Application Calendar allows you to add unlimited information as a note to an appointment or a contextual task. You can also add attachments to a note if needed.

See: Understanding Oracle Notes, page 6- 5 .

Be aware that the Tasks, Notes, and Calendar modules developed for Oracle Common Application Calendar are based on existing task, note and calendar concepts with new enhancements in order for integrated applications, such as Oracle Sales Online or Customers Online, to uptake these features while re-building their functions. Therefore, these Oracle Applications Framework based Tasks, Notes and Calendar modules are not fully compatible with the HTML versions of Tasks, Notes, and Calendar.

For example, task templates, mass tasks creation and reassignment, as well as task hierarchical view are not used in the Oracle Applications Framework based Tasks. Group calendars, public calendars, and grant calendar privileges to other users are not used in the Oracle Applications Framework based Calendar so that you cannot switch calendars. For Notes in Oracle Applications Framework, you can enter unlimited free text while creating notes for a source object.

For detailed product specific implementation and use features for the Oracle Applications Framework based Tasks, Notes, and Calendar modules, see the integrated product documentation.

The Forms-based, HTML, and Oracle Applications Framework Based Tasks, Notes, and Calendar Modules

Compared to the Oracle Applications Framework based versions, the HTML version of Tasks, Notes, and Calendar is developed based on Oracle CRM Technology Foundation (JTT) framework, the java-based development platform for developing applications with HTML and java, and the Forms-based version is developed based on Application Object Library (AOL), the standard development environment for the Forms-based applications.

Depending on various development platforms, different versions of the Tasks, Notes, and Calendar modules are addressed individually in relevant chapters within this book. Detailed information of how to use these modules are contained in the chapters described in the following table:

Comparison of the Forms, HTML, and Oracle Applications Framework Based Versions

User Interfaces	Development Platforms	Where to Find
The Oracle Applications Framework based version	Oracle Applications Framework, the standard HTML development and deployment platform for Oracle HTML Applications	Chapter 8 - Managing Notes in Oracle Applications Framework Chapter 9 - Managing Tasks in Oracle Applications Framework Chapter 10 - Managing Appointments in Oracle Applications Framework
The HTML-based version	Oracle CRM Technology Foundation (JTT) framework, the java-based development platform for developing applications with HTML and java	Chapters 11 to 16 for HTML Notes Chapters 22 to 28 for HTML Tasks Chapters 31 to 37 for HTML Calendar
The Forms-based version	Application Object Library (AOL), the standard development environment for the Forms-based applications	Chapter 17- Using Forms-based Notes Chapters 29 to 30 for the Forms-based Tasks Chapters 38 to 40 for the Forms-based Calendar

Understanding Oracle Task Manager in Oracle Applications Framework

Task Manager provides methods for quantifying, responding to, and managing units of work generated by Oracle E-Business Suite applications. The unit of work is defined in Task Manager in the form of a task. A given task may be defined and bound by units of time, may be assigned to one or more qualified resources, and can be tracked and statused by the application that the work was generated from.

Task Manager developed for Oracle Common Application Calendar is based on existing task concepts with some enhancements. It is currently integrated with Oracle Customers Online, Service Online, Sales Online, Product Lifecycle Management (PLM), and Notes developed for Common Application Calendar. It provides the following task features if integrated applications uptake these features while re-building their functions:

- Ability to manage work assignment for service related tasks that have specific time requirements
- Ability to manage sales related tasks that do not have specific time requirements, such as standalone tasks or personal to dos
- Ability to create a contextual task for a service request, lead or opportunity
- Ability to create a standalone task, such as a personal to do, for a sales agent from Sales Online
- Ability to view all tasks created for a source document, such as a service request, lead, or an opportunity, from the task summary contextual page
- Ability to view standalone tasks for a given source from the personalized task search and result page
- Ability to create personalized saved searches for standalone tasks
- Ability to provide customer contacts information for a contextual task
- Ability to provide repeating function for appointments
- Ability to provide "related to" or references information for appointments

These task features are also in alignment with the Task data security rules.

Note: These Oracle Applications Framework based Task features are uptaken by different applications while re-building their functions. Task Manager in Oracle Applications Framework is not fully compatible with the HTML Task user interface. For detailed implementation and use features of the integrated applications, please consult product specific documentation.

How to use Tasks in Oracle Applications Framework, see Managing Task Manager in Oracle Applications Framework chapter.

For more Tasks information in Forms and HTML, see all Task Manager chapters both in the *Oracle Common Application Components User's Guide* and *Oracle Common Application Components Implementation Guide*.

Understanding Oracle Calendar in Oracle Applications Framework

Use Calendar to manage daily activities, appointments, and schedules of applications resources from various Oracle E-Business Suite applications. Using the calendar features, a user may create appointments and notes, invite attendees for the appointment, and view scheduled activities through calendar daily and monthly views.

The Calendar module is integrated with Task Manager and Notes in Oracle Applications Framework that allows you to associate notes, attachments, and relevant business objects with an appointment or a task. Additionally, it is also integrated with Oracle Sales Online, and a licensed install of Oracle Financials/Oracle Property Manager to provide

essential appointment or calendar screens for them to uptake calendar functionality for their development needs.

The Calendar module developed for Oracle Common Application Calendar is based on existing calendar concepts with some enhancements which allows you to:

- View all scheduled appointments in calendar daily and monthly views
- View details of all scheduled activities in an accessibility daily view
- Search for the availability of resources in an availability view
- Create, update, and view a single appointment
- Create, update, and view a repeating appointment
- Add notes and attachments to an appointment and an invitation
- Update notes and attachments based on Notes data security rules
- Accept a previously rejected invitation or to reject a previously accepted invitation
- Customize calendar personal preferences

Note: These Oracle Applications Framework based Calendar features are uptaken by different applications while re-building their functions. Calendar in Oracle Applications Framework is not fully compatible with the HTML Calendar user interface. For detailed implementation and use features of the integrated applications, please consult product specific documentation.

How to use Calendar in Oracle Applications Framework, see Managing Appointments in Oracle Applications Framework chapter.

For more Calendar information in Forms and HTML, see all Calendar chapters both in the *Oracle Common Application Components User's Guide* and *Oracle Common Application Components Implementation Guide*.

Understanding Oracle Notes in Oracle Applications Framework

The Notes module provides a quick and easy way to enter in any information for an Oracle Applications business object. It is useful for attaching information such as directions, special instructions, or reminders. One or more people with access to the business object may enter in a note; therefore, it is collaborative in nature. It is historical and archivable, and may be further linked to Oracle Attachments.

The Oracle Applications Framework based Notes module created for Oracle Common Application Calendar is based on existing notes concepts with some enhancements which allows you to:

- View all notes and their attachments created for a source document.
- Create a contextual note with unlimited text for a source document, such as a task or a service request.
- Update an existing note attributes, such as note type and visibility.
- Update an existing note text if you have appropriate access privileges.
- Add attachments in the format of text, URL, and file to a note when trying to update the note.

- Delete an existing note if you have appropriate access privileges.

These notes features are also in alignment with the Notes data security rules.

Currently, Notes created for Common Application Calendar can only be accessed through the integrated applications, such as Oracle Service Online, Oracle Sales Online, or contextual task screens developed for Common Application Calendar.

Note: These Oracle Applications Framework based Notes features are uptaken by different applications while re-building their functions. The Notes module in Oracle Applications Framework is not fully compatible with the HTML Notes user interface. For detailed implementation and use features of the integrated applications, please consult product specific documentation.

How to use Notes in Oracle Applications Framework, see Managing Notes in Oracle Applications Framework chapter.

For more Notes information in Forms and HTML, see all Notes chapters both in the *Oracle Common Application Components User's Guide* and *Oracle Common Application Components Implementation Guide*.

Overview of Using the Oracle Common Application Calendar

This chapter covers the following topics:

- Accessing the Oracle Common Application Calendar Interface
- Summary of Oracle Common Application Calendar Tasks

Accessing the Oracle Common Application Calendar Interface

Oracle Common Application Calendar contains Tasks, Notes, and Calendar modules and these modules can be accessed through integrated applications, such as Oracle Sales Online, and Oracle Customers Online.

Additionally, Tasks, Notes, and Calendar are integrated with each other. As a result, you can associate notes and attachments with a task or an appointment.

Perform the following steps to access Oracle Common Application Calendar.

Responsibility

Responsibilities of accessing an integrated application, such as Oracle Sales Online, to access the contextual Tasks, Notes, and Calendar modules in Oracle Applications Framework.

Navigation

Navigate to the appropriate login page.

Steps

1. Enter your user ID and password.
2. Click the Calendar tab to access the daily view.

Summary of Oracle Common Application Calendar Tasks

Use Oracle Common Application Calendar to perform the following types of tasks:

- Chapter 8, Managing Notes in Oracle Applications Framework
- Chapter 9, Managing Tasks in Oracle Applications Framework

- Chapter 10, Managing Appointments in Oracle Applications Framework

Managing Notes in Oracle Applications Framework

This chapter covers the following topics:

- Overview of the Oracle Applications Framework Based Notes
- Using the Add Note Region
- Viewing and Updating the Notes History Region
- Viewing and Updating the Note Details Page

Overview of the Oracle Applications Framework Based Notes

The Notes module for Common Application Calendar adopts the Oracle Applications Framework, the standard HTML development and deployment platform for Oracle HTML Applications. It provides Notes functionality for integrated applications such as Service Online, as well as the Oracle Applications Framework based Appointments and Task Manager contextual screens.

The Notes module in Oracle Applications Framework provides a new look and feel with the following features:

- View all notes and their attachments created for a source document.
- Create a contextual note with unlimited text for a source document, such as a task or a service request.
- Update existing note attributes, such as note type and visibility.
- Update existing note text if you have appropriate access privileges.
- Add attachments to a note when updating the note.
- Delete an existing note if you have appropriate access privileges.

Note: Notes created for Common Application Calendar can only be accessed through the integrated applications, such as Oracle Service Online, Oracle Sales Online, or contextual task screens developed for Common Application Calendar, and are not available in standalone format. Users who can access the integrated applications can access the contextual notes for which they have permissions.

Using the Add Note Region

Use the Add Note region to create notes for a source object such as a task, service request, or appointment.

For Oracle Applications Framework based Tasks, a service agent can add notes to a contextual task either during task creation or update. An agent can create notes to record descriptive information including questions, reminders, directions, or any text that might be reused or referenced later by the attached contextual task.

Creating Notes

To create a note, enter the following information in the Add Note region:

- **Notes Attributes:**
 - **Note Type:** Note type is used to categorize your note. Note types can be mapped to a source object, such as Task or Service Request. After mapping note types to a source, users will see only the mapped note types displayed in the list of values. Note types that are not mapped to any source object are considered general note types and are also shown for all source objects.

Since system administrators can use a profile option to set the default value of the Note Type field during implementation, if the profile option is not set or the default note type is not mapped to a source, then there will not be a default value in this field during note creation. You can select the desired note type from the drop-down list. Otherwise, you can find the default note type set by the system administrators appears in the field.
 - **Visibility:** Visibility is used to determine the accessibility of a note within Oracle Applications. There are three values in the drop-down list:
 - **Private:** Only the creator has the privilege to read and update the note.
 - **Internal Only (Default):** It is visible only to the Oracle E-Business Suite users, not to external users such as guest users, parties, partners, and supplier contacts.
 - **Publish to All:** It is publishable and visible to everyone if the integrated application decides to publish the note.
- **Actual Note Text:** Enter descriptive information in the text box. The length of the note text is unlimited.

Be aware that you cannot create attachments while creating your note in the Add Note region, but you can add attachments later while updating your note in the Note Details window.

Note Text Storage Methods

For the Forms-based and HTML Notes, you can create a note with the following two separate formats:

- **Text Note:** A note stored in a text format is known as a text note or regular note.
- **CLOB Note:** A note stored in a binary format is known as a CLOB Note, large note, or detail note. The CLOB allows you to view a full note with a limit of 4GB in size.

For the Oracle Applications Framework based Notes, you can enter unlimited free form text and all note text can be stored or retrieved from the following locations depending on the note function:

- **Create Notes and Update Notes:** In general, all note text can be entered or updated only in one field and is stored in a CLOB Note.

If your note text is less than or equal to 2000 characters, then the note is stored in both the Text Note and CLOB Note. If it exceeds 2000 characters, then the first 2000 characters are still stored in the Text Notes field, but the complete note text is also stored in the CLOB Note.

- **View Notes:** The first 40 characters are retrieved from the Text Note. All detailed note text is retrieved from CLOB Note.

Creating a Contextual Note

You must have responsibilities to access an integration application such as Oracle Sales Online and create a source document first in order to create a contextual note.

1. Navigate to the Add Note region from the source document.
2. Select appropriate note type and visibility fields from the drop-down menus.
3. Enter descriptive information for your note.

Viewing and Updating the Notes History Region

Use the Notes History region to view the contextual notes that you have access to, and to update note attributes where you have appropriate access privileges.

Through the Notes History region, you can also access the entire note text by clicking the appropriate icon.

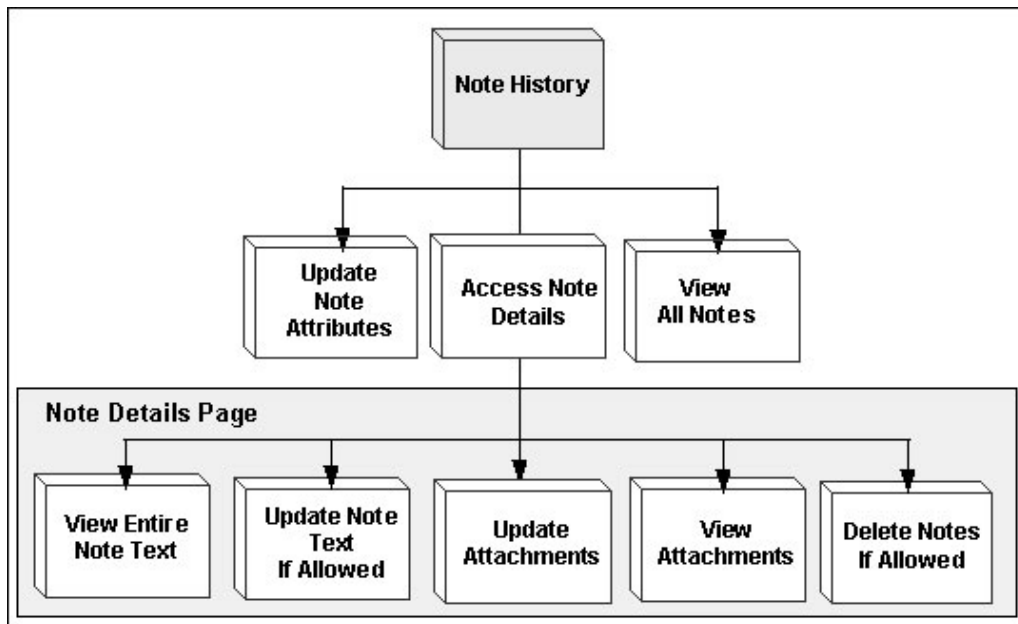
Accessing the Notes History Region

Like the Add Note region, you can access the Notes History region through the integrated applications, such as the Oracle Applications Framework based Task Manager and Oracle Service Online.

To locate the Notes History region, click the Notes History (+) icon to unhide the Notes History region.

The following diagram illustrates the navigation flow of the Notes History region:

Notes History Navigation Flow



Viewing All Contextual Notes

You will see all public notes listed for a specified source object in tabular format with the following fields:

- **Details:** Each note in the Notes History table can be viewed in Hide or Show mode. Click the Show link to see the expanded row region with the following fields:
 - **Note Text field:** This displays the first 2000 characters of the selected note text.
 - **Full Note icon:** Click this icon to access the Note Details region and view the full note text. See: Viewing and Updating Note Details Page, page 8- 5 .
- **Note:** Displays the first 40 characters of the selected note in the note summary row followed by three dots (...) if the note has more than 40 characters. The first 2000 characters are shown in the Note Text field.
- **Date Added:** Displays the date the note was attached to a source object.
- **User:** Displays the creator of the note.
- **Note Type:** Displays the note type information for the selected note.
- **Visibility:** Displays the note accessibility information.

Initially all notes are sorted in descending order based on the Date Added. You can also re-sort the notes by User, Note Type, and Visibility.

Updating Note Attributes

In addition to viewing the actual note, you can also update the note type and visibility fields using the drop-down lists if you have appropriate access privileges. Otherwise, these fields are displayed in read-only format.

Viewing All Notes History

You must have responsibilities to access an integrated application such as Oracle Sales Online and have at least one note exists in order to view all notes history.

1. Navigate to the Notes History region from the source document.
2. Click the Show link to see the first 2000 characters of your selected note.
3. Click the Full Note icon to see the entire note text in the Note Detail window.
4. Update the Note Type and Visibility fields from the drop-down lists if you have appropriate access privileges.

Viewing and Updating the Note Details Page

Use the Note Details window to display existing notes and attachments in read-only or updatable mode depending on your security access.

With appropriate privileges, you can perform the following tasks after clicking the Full Note icon in the Notes History region:

Viewing Note Text and Attachments

You can view the note details including date added, user, note type, visibility, and entire note text in addition to existing attachments listed in the Attachments region.

Updating Note Text

You can update the note text by adding unlimited text.

Deleting Notes

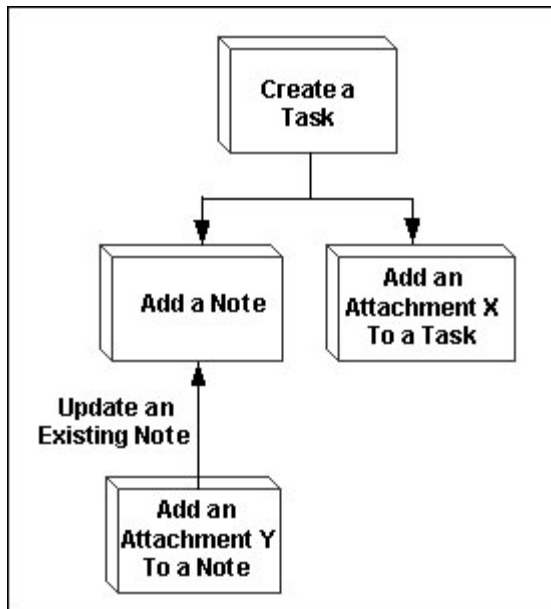
You can delete notes if the Delete button is visible.

Updating Note Attributes and Attachments

You can update note attributes by changing the note type and visibility from the drop-down lists, as well as update attachments by adding, modifying, and deleting attachments to an existing note.

Please note that attachments that are attached to a note can only be accessed from the note, not from a task that the note is currently attached to. If attachments are added to a task, these attachments can only be accessed from the task. The following diagram illustrates the relationship of an attachment to a note and a task:

Attachments Added to a Note and a Task



- *Attachments can be added to a task and to a note that is attached to a task. However, when viewing attachments from a task, you can only view Attachment X, not Attachment Y, as Attachment Y is attached to a note.*

In the Attachments region, you can create an attachment with the format of text, file, or URL. You can also update, delete, or search for existing attachments.

Viewing and Updating Note Details

You must have responsibilities to access an integration application such as Oracle Sales Online and have at least one note exists in order to view or update note details.

1. Navigate to the Note Details window.
2. Click **Full Note** to view the entire full note text.
3. Change the Note Type and Visibility fields from the drop-down lists.
4. Update and delete the note.
5. Click **Add Attachment** to add an attachment to the selected note.
6. Enter a description and select an appropriate option button to correspond to the format of the attachment you want to add.
7. Add your attachment.

Managing Tasks in Oracle Applications Framework

This chapter covers the following topics:

- Overview of the Oracle Applications Framework Based Task Manager
- Using the Personalized Task Search and Result Page
- Using the Task Summary Contextual Region
- Creating Tasks
- Updating and Viewing Tasks
- Using the Task Header or General Region
- Using the Details Region
- Using the Owner and Assignee Region
- Using the Contacts Region
- Using the Schedule or Dates Region
- Viewing the Related Items Region
- Using the Repeating Region

Overview of the Oracle Applications Framework Based Task Manager

Task Manager for Common Application Calendar adopts the Oracle Applications Framework, the standard HTML development and deployment platform for Oracle HTML Applications. It provides Tasks functionality for integrated applications such as Oracle Service Online, Oracle Customers Online, and Oracle Sales Online.

Task Manager for Common Application Calendar provides the following task features if integrated applications use these features:

- Manage work assignment for service related tasks that have specific time requirements
- Manage sales related tasks that do not have specific time requirements such as standalone tasks or personal to dos
- Create a contextual task for a service request, lead or opportunity
- Create a standalone task such as a personal to do for a sales agent from Sales Online

- View all tasks created for a source document, such as a service request, lead, or an opportunity, from the task summary contextual page
- View standalone tasks for a given source from the personalized task search and result page
- Create personalized saved searches for standalone tasks
- Provide customer contacts information for a contextual task
- Provide repeating function for appointments
- Provide "related to" or references information for appointments

Task Manager in Oracle Applications Framework is not fully compatible with the HTML Task Manager's user interface. For example, some HTML Tasks features of creating tasks by using task templates, mass creating tasks and reassignment, as well as viewing task hierarchy are not available in the Oracle Applications Framework based Tasks.

Accessing Task Manager Developed for Common Application Calendar

Task Manager developed for Common Application Calendar can only be accessed through integrated applications, such as Oracle Service Online, Sales Online, Product Lifecycle Management (PLM), or the Calendar module. Users of the integrated applications can access the tasks if they have appropriate access privileges.

Although Task Manager provides a standalone task page allowing you to perform a personalized task search, there is no standalone Oracle Applications Framework based Tasks user interface currently available for you to create personal tasks, such as to dos. The standalone tasks such as personal to dos for sales agents are created only through Oracle Sales Online and Oracle Customers Online.

Documenting Task Features Based on Individual Task Region or Page

All task features developed for Common Application Calendar can be integrated with Oracle Applications. However, depending on each individual application's needs, you might not see every task feature in your screens unless the integrated application has implemented them.

For example, when creating a task, you can see the customer contacts region only if the task is created for a sales related task. It will not be visible if the task is created for a sales agent as a personal to do. For Service Applications, when creating a service related task in Service Online, you might find the Dates region in the task screen specifically used to manage time sensitive work assignments for service engineers. This region allows entry of multiple dates (planned, scheduled, and actual) for tracking purposes. This dates region might not be used in Sales Applications.

Therefore, all task features provided in the Oracle Applications Framework based Tasks are documented based on each embeddable region or page as follows:

- Personalized Task Search and Result Page
- Task Summary Contextual Region
- Task Header or General Region
- Details Region
- Owner and Assignee Region

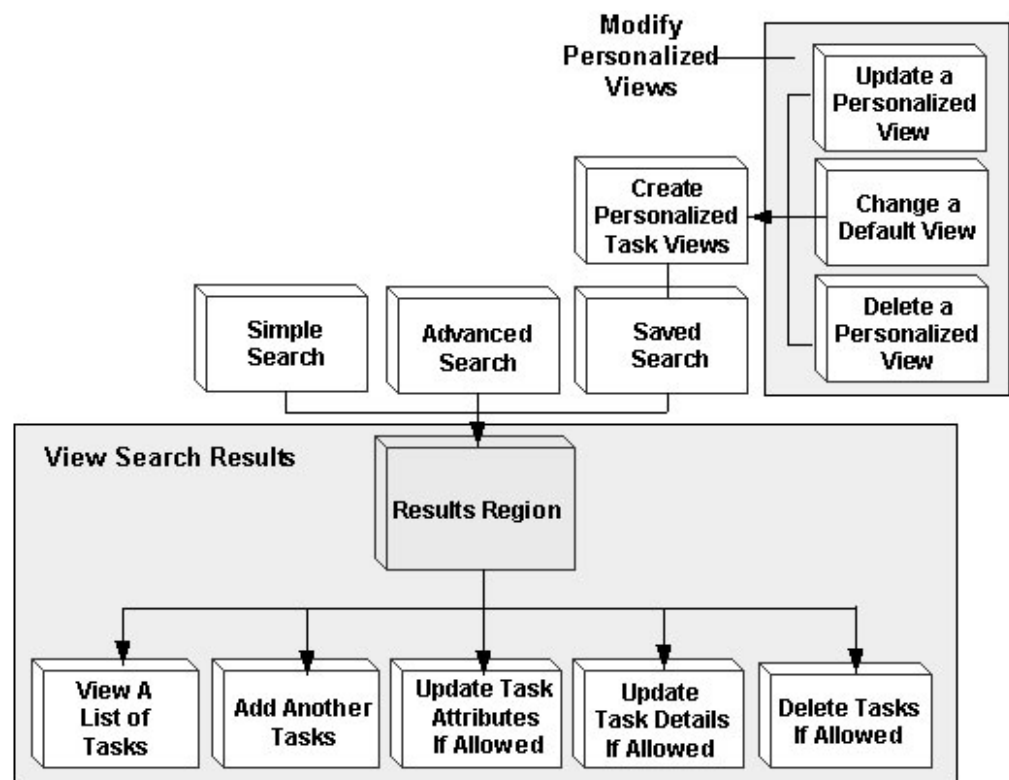
- Contacts Region
- Schedule or Dates Region
- Related Items Region
- Repeating Region

Using the Personalized Task Search and Result Page

Use the Personalized Task Search and Result page to perform a simple or an advanced search for standalone tasks, such as personal to dos, and to view the search results in the Results region with tabular summary format. In addition, you can customize the search result's display options, save searches, and modify personalized search views.

The following diagram illustrates the navigation flow of the Personalized Task Search and Result region:

The Personalized Task Search and Result Page Navigation Flow



You can perform the following tasks in this page:

- Perform a simple task search
- Perform an advanced task search
- Create a personalized save search or task view by specifying appropriate search criteria and display options
- Perform a saved search using a previously created personalized task view

- Modify previously saved personalized task views or change a default task view
- View all tasks that match the search criteria listed in the Results region
- Modify a selected task from the Results region if you have appropriate privileges

Currently, this page is integrated with Oracle Sales Online (OSO) for sales agents to create standalone tasks, such as personal to dos. Please note that the creation of new personal tasks should be done in this summary page, as it is an updatable table.

See Using the Task Summary Contextual Region, page 9- 8 for content sensitive tasks.

Using a Simple Search

Perform a simple task search by entering task subject to find a specific task in the search results region.

In addition, you can perform an advanced search and view search results through the use of personalized saved searches.

Using an Advanced Search

Use the Advanced Search feature to specify more search criteria including task subject, type, status, a specific task due date, and before or after the specified date to locate your tasks. Additionally, you can add one more search criterion by selecting it from the "Add Column" drop-down list.

Before performing a search, you must specify how you want the search data to be retrieved. This can be done either by meeting all the search criteria or any of them.

Viewing Search Results

In the Results region, you can view tasks that are retrieved from your default search displayed in the tabular summary format. This table includes the task Subject, Due Date, Type, and Status fields. If you have appropriate access privileges, you can update task attributes using the drop-down lists, update task details, and delete a task. Otherwise, these attribute fields will be displayed in read-only format, and the "Update More Details" and "Delete" icons are disabled.

Use the Results region to perform the following tasks:

- View a list of tasks based on the selected query or task views
- Add another row by clicking the "Add Another Row" button
- Update task attributes using the drop-down lists if you have appropriate access privileges
- Update task details by clicking the "Update More Details" icon if you have appropriate access privileges
- Remove tasks by clicking the Delete icon if it is not disabled

To perform a search, you can either use a simple or an advanced search. Furthermore, you can use predefined search criteria saved as personalized task views for your search. In the Views region, select a personalized view from the View drop-down list and then execute the query. All tasks that match the selected search are displayed in the Results region.

Click the Personalize button to access the Personalize Views page where you can modify existing views and change the default view.

Creating Personalized Task Views

In addition to simple search and advanced search, Task Manager developed for Common Application Calendar also allows you to use the Create Task View window to create personalized task views that contain your frequently used search criteria, column display options, and sort criteria.

To personalize your task views, enter the following search criteria:

- General Properties
- Column Properties
- Column Display Options and Order
- Sort Settings
- Search Query to Filter Data in Table

General Properties

Use the General Properties region to specify a personalized task view's name, description, and number of rows displayed in the search results region. Select the "Set View as Default" check box if you want this task view to be set as the default value when clicking the Views button in the Personalized Task Search and Result page.

Column Properties

Use the Column Properties region to update the appropriate column attributes as desired by clicking the "Advanced Settings" button. You can rename column names that will be displayed in your search results region. Select the "Show Total" check box if you want the renamed column to be displayed in the Results region.

Column Display Options and Order

Use the Columns Shown and Column Order region to select the desired columns with the display order you like them to be shown in the search results table after performing a search.

For example, select "Customer" and "Creation Date" from the Available Columns if you want the Results region to display these two fields. Use the ">" button to move these fields to the Columns Displayed box. In addition, use the following buttons to make your selection easier:

- Use the ">" button to move the selected fields or the ">>" button to move all the fields in the Available Columns to the Columns Displayed
- Use the "<" button to move the selected fields or the "<<" button to move all the fields in the Columns Displayed to the Available Columns

To arrange the columns displayed order, select one item from the Columns Displayed box, use the "v" button to move the selected item down one in the row. In addition, use the following buttons to arrange the columns displayed order:

- Use the Up Arrow button ("^") to move the selected field up one in the row or use the Top Arrow button to move it to the top of the list
- Use the Down Arrow button ("v") to move the selected field down one in the row or use the Bottom Arrow ("v") button to move it down to the bottom of the list

Sort Settings

Use the Sort Settings region to define sort criteria for your search results. You can manage the results for a selected field sorted by an ascending, a descending, or no sort order.

To define the sort settings, select column names using the drop-down lists for the First Sort, Second Sort and Third Sort fields, and then select appropriate sort orders, such as ascending, descending, or no sort order, respectively. For example, first sort by type with an ascending order, then second sort by priority with an ascending order, and third sort by owner with no sort order.

Search Query to Filter Data in Table

After specifying columns displayed and sort criteria, you can define query in the Search Query to Filter Data in Table region for task owner, due date, type, subject, status, and priority.

For example, use the drop-down list to select a desired connecting value for a task field, such as task owner "contains" a selected owner name, "John", or due date is "greater than" a selected date, "07/23/03". Use the [Control] key to select multiple values for task status and priority fields. For example, status "equals to" selected statuses "Open", and "In Planning". Priority "does not equal to" selected priorities, "Low", and "Optional".

Optionally, use the drop-down list next to the Add button to add another search criterion.

In addition, you can execute the query in either of the following conditions:

- Show table data when all conditions are met.
- Show table data when any conditions are met.

After saving your query, you can find the newly created query added to the Personalize Views table where you can modify existing task views or reset a default view.

Use the "Apply and View Results" button to save your query and display the search results in the Results region simultaneously.

Modifying Personalized Views

After saving your personalized task views, you can use the Personalize Views page to view all task views, change the default view, and redefine your saved searches if necessary. Task Manager developed for Common Application Calendar allows you to modify the existing views in the following ways:

- Update an existing task view
- Delete an existing task view
- Change a default task view
- Create a new personalized task view

Before updating your task view, you can select the view name link to execute the query and retrieve the search results in the Results region displayed along with the Simple Search region.

In addition to modifying existing views, you can create a duplicate copy of a selected task view by clicking the Duplicate button and then modify the copy with desired criteria.

Perform the following steps to view tasks in the Results window, and to create personalized task views.

Responsibility

Responsibilities to access the Oracle Sales Online and Oracle Product Lifecycle Management.

Navigation

Navigate to the Personalized Task Search and Result page.

Steps

1. In the Personalized Task Search and Result page, view all tasks that match the default search criteria. Additionally, you can:
 - Add another row.
 - Click **Update More Details** to update a selected task details.
 - Remove tasks.
2. Use the Advanced Search region to enter multiple search criteria.
3. Perform simple search by entering task subject.
4. Click **Views** to view or modify existing personalized task views.
5. Click **Saved Search** to create personalized task views.
6. Enter the following information in the Create Task View page:
 - **General Properties:** Specify the View Name, Description, and Number of Rows Displayed fields. Select the "Set View as Default" check box to set the default task view.
 - **Column Properties:** Click **Advanced Settings** to rename column names and totaling. Select the "Show Total" check box if you want the renamed column to be displayed in the Results region.
 - **Column Display Options and Order:** Select columns from the Available Columns that you want them to be displayed in the Results region. Click appropriate icons to select your display columns and to rearrange the Columns Displayed order.
 - **Sort Settings:** Select column names using the drop-down list for the First Sort, Second Sort, and Third Sort fields and then select appropriate sort orders respectively.
 - **Search Query to Filter Data in Table:** Specify the task owner, due date, type, subject, status, and priority using the drop-down lists. Select an appropriate connecting value between each field and the corresponding value. Use the drop-down list to add another criterion to your query. Specify an appropriate radio button for the query with either all conditions or any conditions are met.
7. Click **Apply and View Results** to save your query and display the search results in the Results region simultaneously.
8. In the Personalize Views page, you can:
 - Change a default task view.

- Create a new task view.
- Create a duplicate task view.

See Also

- Using the Task Summary Contextual Region, page 9- 8
- Creating Tasks, page 9- 9
- Updating and Viewing Tasks, page 9-10

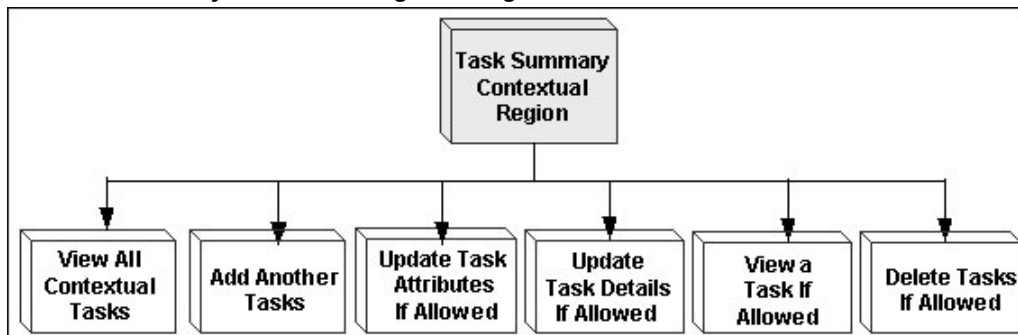
Using the Task Summary Contextual Region

Use the Task Summary contextual region to display tasks created for source objects, such as service requests, sales, leads, or opportunities, in the tabular summary format containing task subject, due date, type, and status. If you have appropriate access privileges, you can update these fields using the drop-down lists. Otherwise, these fields will be displayed in read-only format.

With appropriate privileges, you can also view a selected task, update the task details, and delete the task if the "View More Details", "Update More Details", and "Delete" icons are enabled.

The following diagram illustrates the navigation flow of the Task Summary contextual region:

The Task Summary Contextual Region Navigation Flow



You can perform the following tasks from this embedded task summary contextual region:

- View all contextual tasks related to your source document, such as a service request, sales, lead, or an opportunity
- Update task subject and attributes using the drop-down list if you have appropriate privileges
- Update task details by clicking the "Update More Details" icon to drill down to the Update Task window if you have appropriate privileges
- View a selected task by clicking the "View More Details" icon if you have appropriate access privileges
- Add another task by clicking the "Add Another Row" button

- Delete an existing task if the Delete icon is enabled

While adding a new task using the "Add Another Row" button, you can only delete the new task once it is added to the table. You cannot view or update any existing tasks because the "View More Details" and "Update More Details" icons are disabled.

Task security access can be enforced for the contextual tasks if the profile option "Task Manager: Set Context Data Security" is set to "Security Access" which turns the security ON. This allows users to have either Full Access or Read Only security access to the task.

Perform the following steps to view the embedded Task Summary window.

Responsibility

Responsibilities to access an integrated application, such as Oracle Service Online, Oracle Sales Online, and Oracle Product Lifecycle Management.

Navigation

Navigate to the Task Summary window

Steps

1. View all contextual tasks related to a source document in the Task Summary window.
2. Modify the task subject and attributes using the drop-down lists if you have appropriate access privileges.
3. Update other task details by clicking the **Update More Details** icon to drill down to the Update Task window if you have appropriate access privileges.
4. View a task details by clicking the **View More Details** icon if you have appropriate access privileges.
5. Add another task by clicking **Add Another Row**.
6. Delete a selected task if you have appropriate access privileges.

See Also

- Using the Personalized Task Search and Result Page, page 9- 3
- Creating Tasks, page 9- 9
- Updating and Viewing Tasks, page 9-10

Creating Tasks

Use the Create Task window to create a task.

Depending on business needs of each integrated application, different task regions are implemented in the Create Task window. As a result, you might not see every task feature in your screens unless the integrated application has implemented them.

For example, when creating a sales related task, you can see the customer contacts region. This contacts region will not be visible if the task is created for a sales agent as a personal to do. For Service Applications, when creating a service related task in Service

Online, you might find the Dates region in the task screen specifically used to manage time sensitive work assignments for service engineers. This region allows entry of multiple dates (planned, scheduled, and actual) for tracking purposes. This dates region might not be used in Sales Applications.

Creating Sales Related Tasks

Use the following regions in the Create Task window when creating sales related tasks:

- Task header or General region, page 9-12 (includes single due date)
- Details region, page 9-14 (includes source and customer, when created in the context of these items)
- Owner and Assignee region, page 9-15
- Contacts region, page 9-16 (This region is only available for a sales related contextual task that has customer information identified.)

Creating Service Related Tasks

Use the following regions in the Create Task window when creating service related tasks:

- Task header or General region, page 9-12
- Details region, page 9-14
- Schedule or Dates region, page 9-18
- Owner and Assignee region, page 9-15

See Also

- Updating and Viewing Tasks, page 9-10
- Using the Personalized Task Search and Result Page, page 9- 3
- Using Task Summary Contextual Region, page 9- 8

Updating and Viewing Tasks

You can update or view a task based on your access privileges. If you have the update privilege, the task fields are displayed in updatable format. Otherwise, you can only view the task without any updates. The available regions for either the update task or view task screen are the same regions used for task creation.

When updating or viewing a sales related task, the following regions are used:

- Task header or General region, page 9-12
- Details region, page 9-14
- Owner and Assignee region, page 9-15
- Contacts region, page 9-16 (This region is only available for a sales related contextual task that has customer information identified.)

When updating or viewing a service related task, the following regions are used:

- Task header or General region, page 9-12

- Details region, page 9-14
- Dates region, page 9-18
- Owner and Assignee region, page 9-15

Updating Tasks with Task Security

Since task security rules are implemented in Task Manager, when updating a task, whether you have Full Access or Read Only access is determined by the following conditions:

- **For a contextual task**

The security access is based on the following values set in the "Task Manager: Set Context Data Security" profile option:

- Full Access (default value): This value turns the security OFF, so that all the tasks related to the context can be viewed, updated, and deleted.
 - Security Access: This value turns the security ON for all task instances within context and allows users to have either Full Access or Read Only security access to the task. When Read Only access is granted, you can see a read-only page displayed in the Update Task window. Otherwise, an updatable page will be displayed.
 - **For a standalone task**, such as personal to do, created for a sales agent
- The system will check the user security access based on data security. The user can have Full Access or Read Only access privilege.

For more task security rules used in the Oracle Applications Framework based Tasks, see Task Security in the Oracle Applications Framework and Forms Based Tasks, page 28- 4 , Data Security for Tasks chapter.

Viewing Tasks

Use the Task Details window to view a selected task displayed in read-only format. However, you can launch an e-mail compose window by clicking the e-mail link in the Owner and Assignee region if it is for a sales related task and the e-mail link in the Contacts region.

Perform the following steps to update a selected task.

Prerequisites

You must have appropriate access privileges to update or view a task. Otherwise, the "Update More Details" icon or "View More Details" icon for the task that you want to update or view will be disabled in the Task Contextual Summary region.

Responsibility

Responsibilities to access an integrated application, such as Oracle Service Online, or Oracle Sales Online, or Oracle Product Lifecycle Management

Navigation

Navigate to the task contextual summary region

Steps

1. Click the "Update More Details" icon or the "View More Details" icon for the task that you want to update or view in the task contextual summary region.
2. Update a selected task in the Update Task window based on the task security and save your changes.
3. View a selected task in the Task Details window if task fields are displayed in read-only format.

See Also

- Creating Tasks, page 9- 9
- Using the Task Summary Contextual Region, page 9- 8
- Using the Personalized Task Search and Result Page, page 9- 3

Using the Task Header or General Region

Use task header or general region to enter basic task information including subject, type, and status. Besides these basic task fields, tasks created for different source objects require additional fields to address different task needs.

Sales Related Tasks

A sales related contextual task has an additional Due Date field in the region. When a sales agent creates a personal to do, it requires only Due Date for the task, not specific time requirements.

Service Related Tasks in Service Online

However, for a service related task created in Service Online, whether the task is completed on time or behind the schedule is critical for the service request. Therefore, instead of having the Due Date field in this region, service related tasks use the Dates region with more fields to manage time sensitive work assignments. The Visibility and Priority fields that are listed in the Details region for sales related tasks are displayed in the General region for service related tasks.

Detailed information for each field in this region is addressed as follows:

- Task subject is the task title or summary information of your task.
- Task type classifies the purposes of your task creation, such as a Follow-up task, or an Appointment task.

This field can be defaulted if the profile option "Task Manager: Default Task Type" is set. Additionally, only the mapped task types to a source are listed in the list of values (LOV). If none of the task types is mapped to your object, then all types will be displayed in the LOV. See: *Defining Task Types, Oracle Common Application Components Implementation Guide*.

- Task status specifies the progress of your task, such as Open, Working, or Completed.

This field can be defaulted if the profile option "Task Manager: Default Task Status" is set. In addition, status transition rules will be used if a rule is assigned to the logged-in user's responsibility. As a result, the user will only see the statuses specified in the rule from in the LOV. See: *Defining Task Statuses and Status Transition Rules, Oracle Common Application Components Implementation Guide*.

- Additional fields for service related tasks created:
 - Visibility: This field determines the accessibility of a task. It has the following values from the drop-down list:
 - Private: Only the creator has the privilege to read and update a task.
 - Internal Only (Default): The owner and assignees can read and update a task if they have appropriate privileges.
 - Publish to All: A task becomes publishable over the Internet. Anyone can view it.
 - Priority: This field defines the urgency or an importance rating for a task, such as low, high, and critical.

This Priority field can be defaulted if the profile option "Task Manager: Default Priority" is set. In addition, like task type, only the mapped task priorities to a source are listed in the list of values (LOV). If none of the task priorities is mapped to your object, then all priorities will be displayed in the LOV. See: *Defining Task Priorities, Oracle Common Application Components Implementation Guide*.

Please note that the Priority field can be defaulted by the profile option "Task Manager: Default Priority". If there is no default value and this field is left blank during task creation, this field will be defaulted to "Unprioritized" in the task update screen.

Note: Source is read-only text to display the source object and ID.

- Additional fields for sales related tasks:
 - Due Date: This field specifies the end date needed for task completion. Use the profile option "Task Manager: JTF Tasks Default Date Selected" to change the default due date from Scheduled date to either Planned or Actual date. Otherwise, the default Scheduled date is populated in the Due Date field. In addition, the date format displayed under the Due Date field is based on the value set in the profile option "ICX_DATE_FORMAT".

The Visibility, Priority, and Source fields are in the Details region for sales related tasks.

Perform the following steps to enter or update the task header or general region.

Responsibility

Responsibilities to access an integrated application, such as Oracle Service Online, or Oracle Sales Online, or Oracle Product Lifecycle Management

Navigation

Navigate to the task header or General region

Steps

1. Enter task subject information.
2. Select appropriate type and status using drop-down lists.
3. Enter a task due date using date picker icon for a sales related task.
4. For a service related task created, enter the following fields:
 1. Select an appropriate visibility using the drop-down list.
 2. View source document information.

See Also

- Using the Details Region , page 9-14
- Using the Owner and Assignee Region, page 9-15
- Using the Contacts Region, page 9-16
- Using the Schedule or Dates Region , page 9-18
- Viewing the Related Items Region, page 9-18
- Using the Repeating Region, page 9-19

Using the Details Region

Use the Details region to specify additional task information.

For a sales related task, you can see the following fields in this region:

- **Visibility:** It determines the accessibility of a task. You can see "Private", "Internal Only" (default), and "Publish to All" from the drop-down list. The value "Publish to All" is not available for a standalone task, such as a personal to do created for a sales agent.
- **Priority:** It defines the urgency or an importance rating for a task, such as low, high, and critical.

For more information about visibility and priority fields, see Additional fields for Service related tasks, page 9-13 in the Task Header or General Region.

- **Description:** It details a task with free-form text.

You can also see source and customer information displayed as read-only text if it is a contextual task. For example, the source information, "Lead: iAS Lead", and customer, "Business World", can be displayed for a contextual task created for a sales lead name "iAS" for a customer "Business World".

For a contextual task created for a service request, in addition to the task description, you can see the "Task Closure Required" check box that restricts the closure sequence of a task and the related service request. Select this check box to specify that this contextual task must be closed first before closing the service request.

Perform the following steps to enter or update the Details region.

Responsibility

Responsibilities to access an integrated application, such as Oracle Service Online, or Oracle Sales Online, or Oracle Product Lifecycle Management

Navigation

Navigate to the Details region

Steps

1. Select an appropriate visibility using the drop-down list for a sales related task.
2. Select an appropriate priority using the drop-down list for a sales related task.
3. Enter task description information.
4. For a task created for Service Online, select the Task Closure Required check box if you want the task to be closed first before closing the service request.

See Also

- Using the Task Header or General Region, page 9-12
- Using the Owner and Assignee Region, page 9-15
- Using the Contacts Region, page 9-16
- Using the Schedule or Dates Region, page 9-18
- Viewing the Related Items Region, page 9-18
- Using the Repeating Region, page 9-19

Using the Owner and Assignee Region

Use the Owner and Assignee region to identify the owner and assignees for a task.

A Task Owner

The task Owner and Type fields can be defaulted if the following profile options are set:

- Task Manager: Owner Type for a task
- Task Manager: Default Task owner

You can update the defaulted owner name to other resources if needed.

A Task Assignee

To add assignee(s) to the task, click the "Add Another Row" button to enter assignee information.

For the Type field, all the resource types with the usage of "RESOURCES" are displayed in the drop-down list if the assignee mappings do not exist. Otherwise, only the mapped assignee and owner types will be displayed in the list. All other unmapped types will not be in the list. For more information, see: Mapping Task Types to a Source, *Oracle Common Application Components Implementation Guide*.

Other Fields in the Region

After identifying task owner and assignee(s), the following fields are populated:

- For a service related task in Service Online, you can see the owner and assignee status fields which are unique to the service related task for managing work assignments. These fields are not available for sales-related tasks.
- For a sales related task, the selected resource's phone number, job title, and e-mail information are populated automatically in this region. Clicking the e-mail link to launch the e-mail compose window. There is no assignee or owner status field for a sales related task.

You can delete assignees in this region, but you must have one owner for your task.

Perform the following steps to enter or update the Owner and Assignee region.

Responsibility

Responsibilities to access an integrated application, such as Oracle Service Online, or Oracle Sales Online, or Oracle Product Lifecycle Management

Navigation

Navigate to the Owner and Assignee region

Steps

1. Select an appropriate owner type if it is not defaulted.
2. Select an owner name from the search.
3. Select **Add Another Row** to add assignee information.
4. Select an appropriate assignee type using the drop-down list.
5. Select an assignee name from the search.
 - For a service related task, a default owner status is displayed in this region.
 - For a sales related task, the selected resource's phone number, job title, and e-mail information are populated automatically in this region.

See Also

- Using the Task Header or General Region, page 9-12
- Using the Details Region, page 9-14
- Using the Contacts Region, page 9-16
- Using the Schedule or Dates Region, page 9-18
- Viewing the Related Items Region, page 9-18
- Using the Repeating Region, page 9-19

Using the Contacts Region

Use the Contacts region to manage customer contacts for a task. This region is only available for a sales related contextual task that has customer information identified. It is

not used for a standalone task, such as a personal to do, created through Oracle Sales Online for a sales agent without a specific customer.

The Search fields on the contact list of values page when you click on the "Add Contact(s)" button are rendered based on the Trading Community Architecture (TCA) Data Quality Management match rule. For more information, see Data Quality Management documentation provided by TCA to define match rules.

Click on the "Add Contact(s)" button to access the TCA search page to select a contact. Once a contact is selected, the primary job title, e-mail, phone, and address are displayed automatically. If there are multiple contacts for a task customer, you can select one of them to be the primary contact by clicking the "Set as Primary" button.

Perform the following steps to enter or update the Contacts region.

Prerequisites

Customer information needs to be identified for a task.

Responsibility

Responsibilities to access an integrated application, such as Oracle Sales Online, or Oracle Product Lifecycle Management

Navigation

Navigate to the Contacts region

Steps

1. Select an appropriate contact name if it is not defaulted. The primary job title, e-mail, phone, and address are displayed.
2. Click **Add Contact(s)** to access the TCA search page to select a contact.
3. If there are multiple contacts in this region, select a contact to be the primary contact by click **Set as Primary**.
4. Remove existing contacts if needed.

See Also

- Using the Task Header or General Region, page 9-12
- Using the Details Region, page 9-14
- Using the Owner and Assignee Region, page 9-15
- Using the Schedule or Dates Region, page 9-18
- Viewing the Related Items Region, page 9-18
- Using the Repeating Region, page 9-19

Using the Schedule or Dates Region

Task Manager uses the Schedule region including the Dates region for service related tasks to record time sensitive information including planned effort, planned effort unit of measure, as well as planned and scheduled start and end dates.

Task Dates

Task start and end dates are essential fields for service related tasks. To effectively manage service related task assignments, you must enter either one of the following fields:

- **Planned:** Enter the planned start and end dates for a task. For example, a repair task is specifically planned from February 12 to February 14, 2004.
- **Scheduled:** Enter the scheduled start and end dates if the task has been scheduled.

Perform the following steps to enter or update the Dates region.

Responsibility

Responsibilities to access an integrated application, such as Oracle Service Online

Navigation

Navigate to the Dates region

Steps

1. Enter the "Planned Effort" information and then select the unit of measure to associate with it.
2. Specify the planned or scheduled start and end dates information.

See Also

- Using the Task Header or General Region, page 9-12
- Using the Details Region, page 9-14
- Using the Owner and Assignee Region, page 9-15
- Using the Contacts Region, page 9-16
- Viewing the Related Items Region, page 9-18
- Using the Repeating Region, page 9-19

Viewing the Related Items Region

Use the Related Items region to display references information including reference type, name, description, and date added in the read-only format for a task or an appointment.

Currently, this region is only integrated with the Appointments screens, and it is not used in Tasks.

Perform the following steps to view the Related Items region.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Related Items region by clicking the Related Items link in the Appointments screens

Steps

1. In the Related Items region to view the reference information for an appointment.

See Also

- Using the Task Header or General Region, page 9-12
- Using the Details Region, page 9-14
- Using the Owner and Assignee Region, page 9-15
- Using the Contacts Region, page 9-16
- Using the Schedule or Dates Region, page 9-18
- Using the Repeating Region, page 9-19

Using the Repeating Region

Use the Repeating region to create and update recurrences for an appointment. You can create these recurrences with different frequencies including daily, weekly, monthly, and yearly.

Note: The Repeating region is currently integrated only with the Create Appointment and Update Appointment pages. It is not used in Tasks.

To define repeating appointments, you must identify the following elements:

- Repeating frequency type. It can be daily, weekly, monthly, and yearly.
- Repeating pattern. It includes how frequent the appointment to be repeated, such as repeat each day, or every two weeks, as well as on any particular days the appointment to be repeated, such as repeat every Tuesday, or every 15th of each month.
- Repeating range. It includes the start date and end date of the repeating cycle. The start date is the same date as used for an appointment. The end date can be determined by either an actual date, or the number of occurrences appointment to be repeated.

To create repeating appointments in the Create Appointment window, first specify the repeating frequency in the Frequency Type field using the drop-down list. You can select daily, weekly, monthly, or yearly for your repeating appointments.

Daily Repeating

In the daily repeating region, you must define how frequent the appointment will be repeated in the Repeat Every number of Day(s) field. For example, repeat every two days.

The daily repeating start date is the same date as the date for an appointment, and its end date is determined by either of the following fields:

- **Repeat Until:** Use the date picker icon to enter a specific end date, such as Oct-10-2003.
- **End After Occurrence(s):** Use this field to enter the number of times the appointment should be repeated. For example, enter 10 in the field if you want the appointment to be repeated 10 times including the appointment you just created.

You must enter either the end date in the Repeat Until field or the number of occurrences in the End After Occurrence(s) field to set the end date for the repeating appointments. For example, repeat every two days for an appointment starting on July 22, 2003 with 4 occurrences. As a result, the repeating appointments are scheduled on July 22, 2003, July 25, 2003, July 28, 2003, and July 31, 2003.

Weekly Repeating

For the weekly repeating, in addition to specifying how frequent the appointment will be repeated in the Repeat Every number of Week(s) field, you also need to identify on what weekday(s) the appointment to be repeated using check boxes. By default, the weekday check box of the appointment start day is automatically checked. For example, if your appointment starts Wednesday on March 3rd, 2004, then the Wednesday check box will be automatically checked by default when weekly repeating is selected. You can also select more weekdays if needed, such as repeat every Wednesday, Thursday, and Friday each week.

Like daily repeating, the start date of the weekly repeating is the same date as the date for an appointment. The end date of the weekly repeating is determined by either the end date specified in the Repeat Until field or the number of occurrences in the End After Occurrence(s) field.

Monthly Repeating

Enter the repeating pattern by specifying how frequent the appointment to be repeated in the Repeat Every number of Month(s) field, as well as specifying repeat on what particular day(s) or date(s) in a month for the repeating.

- **Repeat On Date**
To repeat on the exact date as defined by start date. For example, if start date is 01-22-2003, the repeating will be performed on the 22nd of each month.
- **Repeat On Day**
Instead of specifying the exact dates, you can select a particular week and day(s) in a month that you want the repeating to occur. Like weekly repeating, the weekday check box of the appointment start day is automatically checked by default. You can also select more weekdays if needed, such as repeat Wednesday plus the first Friday of each month.

The start date of monthly repeating is the same date as the date entered for an appointment. You must specify an end date by either entering a date in the Repeat Until field or the number of occurrences in the End After Occurrence(s) field.

Yearly Repeating

Like all other repeatings, you must define how frequent the appointment will be repeated in the Repeat Every number of Year(s) field. For example, repeat every two years.

In addition, specify the repeating pattern by selecting either one of the following radio buttons:

- Repeat On Date

Select the exact date within one year that you the appointment to be repeated, such as repeat every two years on March 20.

- Repeat On Day

Instead of specifying the exact date, you can select a specific weekday, such as the third Friday, for a particular month, such as in July.

The start date is the same date as used for an appointment. You must specify an end date by either entering a date in the Repeat Until field or the number of occurrences in the End After Occurrence(s) field.

Perform the following steps to define the Repeating region.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Repeating region by clicking the Repeating link in the Create Appointment or the Update Appointment page

Steps

1. In the Repeating region, select an appropriate Frequency Type using the drop-down list.
2. Enter an appropriate number in the Repeat Every Day(s), Repeat Every Week(s), Repeat Every Month(s), or Repeat Every Year(s) field.
3. Specify particular weekday(s) using the check boxes that you want the appointments to be repeated if it is for weekly repeating.
4. Select either one of the following radio buttons if it is for monthly, or yearly repeating:
 - Repeat On Date: Specify the exact date(s) that you want the appointments to be repeated.
 - Repeat On Day: Specify which weekdays or in a particular month that you want the appointments to be repeated, such as the second Tuesday, or the fourth Friday in July.
5. Specify the end date for your repeating appointments in either one of the following fields:
 - Repeat Until: Use the date picker to identify the end date in the field.
 - End After Occurrence(s): Enter the number of occurrences that you want the appointments to be repeated.

See Also

- Using the Task Header or General Region, page 9-12
- Using the Details Region, page 9-14
- Using the Owner and Assignee Region, page 9-15
- Using the Contacts Region, page 9-16
- Using the Schedule or Dates Region, page 9-18
- Viewing the Related Items Region, page 9-18

Managing Appointments in Oracle Applications Framework

This chapter covers the following topics:

- Overview of the Oracle Applications Framework Based Calendar
- Creating Appointments
- Viewing Appointments
- Updating Appointments
- Responding to Appointment INVITES
- Viewing Your Personal Calendar Views
- Viewing Personal Calendar Daily View
- Viewing Accessibility Daily View
- Viewing Personal Calendar Monthly View
- Checking Resource Availability
- Customizing Calendar Preferences
- Customizing Calendar View Preferences
- Customizing Calendar Default Preferences

Overview of the Oracle Applications Framework Based Calendar

The Common Application Calendar module provides essential functionality of managing daily activities generated by various Oracle E-Business Suite applications. It allows you to create and update appointments, respond to appointment invitations, check resource availability, and view scheduled activities through personal calendar daily and monthly views.

Similar to Notes and Tasks, the Calendar module adopts the Oracle Applications Framework to provide essential Calendar functionality for integrated applications, such as Sales Online and licensed Oracle Financials/Oracle Property Manager. It provides a new look and feel with the following features:

- Create, update, and view a single appointment
- Create, update, and view a repeating appointment
- Add notes and attachments to an appointment and invitation

- Update notes and attachments based on Notes data security rules
- Accept a previously rejected invitation or reject a previously accepted invitation
- View scheduled activities in calendar daily and monthly views
- Search for resource availability in an availability view
- View all details of the scheduled activities in an accessibility daily view
- Customize your personal calendar preferences

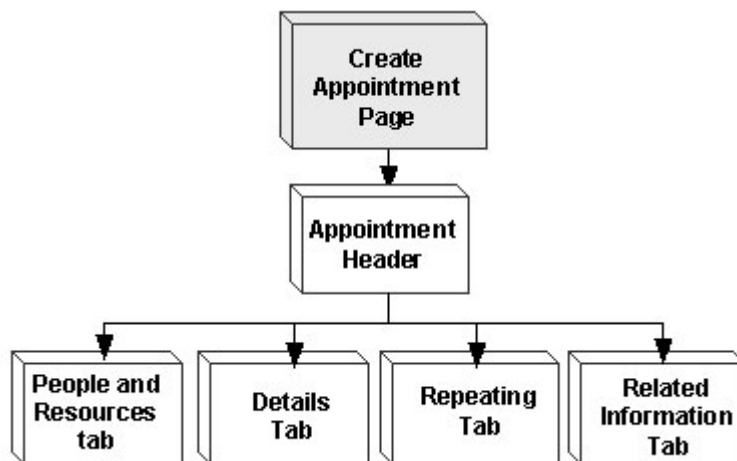
Calendar in Oracle Applications Framework is not fully compatible with the HTML Calendar user interface. For example, some HTML Calendar features of using group and public calendars, as well as granting calendar privileges to other users are not available in the Oracle Applications Framework based Calendar.

Creating Appointments

Use the Create Appointment window to create a single or repeating appointment. After creating an appointment, you can access the calendar daily view by default.

To create an appointment, enter appointment header information and necessary tabs as illustrated in the following diagram:

The Create Appointment Page Navigation Flow



There are four tabs in the Create Appointment window:

- People and Resources tab, page 10- 3 . Use this tab to view resource availability for the appointment specified in the header.
- Details tab, page 10- 3 . Use this tab to enter appointment details.
- Repeating tab, page 10- 4 . Use this tab to create a repeating appointment.
- Related Information tab, page 10- 4 . Use this tab to add notes, attachments and other reference information.

Creating Appointment Header

Enter basic appointment information in the header region including the Subject, Date, Time, Duration, Location, and Dial in number fields.

Note: The Calendar in Oracle Applications Framework is integrated with Oracle Property Manager to enable space reservation. To use this location booking feature, you need a licensed install of Oracle Financials/Oracle Property Manager. Clicking **Add Location** next to the Location field in the header tab launches the Bookable Locations search window. This allows you to search locations by region, country, state, city, space type, building, and floor. After a search, multiple locations can be selected from the search result. These selected locations will be automatically added to the People and Resources tab along with your selected resources for an appointment.

Important: This location booking feature will not be available if you do not have a licensed install of Oracle Financials/Oracle Property Manager and **Add Location** will not be visible.

An appointment's start and end date and time are stored in server timezone unless the appointment is an all day appointment. When appointments are displayed in calendar daily view, the date and time are displayed in user timezone.

For example, in the header, enter an appointment called "Team Meeting" as the subject for coming Monday at 10:00 a.m. for one hour at Room 432. You can specify the date, time, location, and duration, one hour, for the meeting. Dial in number can also be entered if anyone needs to call in from different locations. .

Inviting People and Resources

Use the People and Resources tab to search for resources and check their availability based on the date entered in the appointment header as well as the start and end time specified in this tab.

After finding desired resources, you can view the availability of each individual resource as well as the combination of all the selected resources' availability together in the availability view table.

Use the Show or Hide hyperlink to list a resource's e-mail, phone, and office information or a location's suite, floor, and building information. This allows you to contact the resource directly for availability check if needed before inviting the resource to the appointment specified in the header. The e-mail link enables the e-mail compose window which allows you to send e-mails through an integrated webmail, such as Oracle Collaboration Suite, if the following profile options are identified correctly:

- **Profile Option: "ATGCA: Enable Web Mail"**. This profile enables e-mails sent from an integrated webmail through the Calendar Availability window.
 - If it is set to "Yes", then you can launch webmails through the Availability window.
 - If it is set to "No" (default), then HTML "mailto:" attribute will be used instead. Using "mailto:" attribute will invoke default browser e-mail client, such as Netscape Messenger.

- **Profile Option: "ATGCA: Web Mail Server".** This profile specifies the URL address for the integrated webmail server.

For example, set the URL to "https://collabsuite.oracle.com/um/traffic_cop" when HTML Calendar is integrated with Oracle Collaboration Suite. You can send e-mails through Oracle Collaboration Suite from the Availability window.

In addition, you can update the resources by adding more or removing some of them to finalize the resource list for the appointment.

Entering Appointment Details

Use the Details tab to enter description and other appointment details including the Type, Category, Priority, Access, and Reminder fields if you want to change the default values.

For example, select "Meeting" in the Type field for the "Team Meeting". Since this meeting is a regular meeting, not a private appointment, use "Medium" for the Priority field and "Normal" for the Access field. Select "10 minutes before" in the Reminder field so that you will receive a workflow notification in your Personal Home Page Worklist 10 minutes prior to the meeting. Keep "Busy" in the "Shown As" field so that the availability for the appointment owner specifically for this appointment time will be busy. If the owner is also invited to other appointments for the same time, the value "Busy" identified here will indicate that the owner is not available for the selected time.

Appointment Default Values

Instead of entering appointment fields each time when creating an appointment, you can set default values for the Duration, Location, Type, Priority, Access, Shown As, Reminder, and Category fields in the Calendar Default Preferences page.

See: Customizing Calendar Default Preferences, page 10-15.

Creating Repeating Appointments

Use the Repeating tab to create repeating appointments with different frequencies including daily, weekly, monthly, and yearly.

See: Using the Repeating Region, page 9-19.

Adding Notes and Other Related Information

Use the Related Information tab to add notes, attachments, and other reference information to the appointment specified in the header.

Adding Notes and Attachments

Use the Add Note region to add new notes to the appointment specified in the header. Once notes are added to the appointment, you can view the notes in the Note History region.

See: Using the Add Note Region, page 8-2.

Use the Attachments region to add attachments with the appropriate format, Text, File, or URL, to your appointment.

Adding Reference Information

Use the Related Items region to add appointment reference information. However, currently this region shows no data by default and you cannot add any data unless a corresponding ID and source are passed from a customer page.

Perform the following steps to create an appointment.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Create Appointment window by clicking the Create button in calendar daily view.

Steps

1. Enter appointment information in the appointment header.
2. Search for resources and view the availability of selected resources in the People and Resources tab.
3. Enter appointment details In the Details tab.
4. (Optional) Enter repeating appointment information in the Repeating tab. See: Using the Repeating Region, page 9-19.
5. Enter notes, attachments, or search for attachments by using the "Show Simple Search" link in the Related Information tab if needed.

See Also

- Updating Appointments, page 10- 6
- Viewing Appointments, page 10- 5
- Responding to Appointment INVITES, page 10- 7

Viewing Appointments

After clicking an appointment from calendar daily view, you can view the appointment details including invitation statuses regardless if invitees have been accepted or rejected, as well as attached notes and attachments in read-only format.

Any appointment updates must be performed in the Update Appointment window. You can delete the appointment after viewing it.

To view or update notes attached to the appointment, see Viewing and Updating the Notes History Region, page 8- 3 .

Perform the following steps to view an appointment details.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Appointment General window

Steps

1. View the appointment details.
2. Update or delete the appointment if needed.

See Also

- Creating Appointments, page 10- 2
- Updating Appointments, page 10- 6
- Responding to Appointment INVITES, page 10- 7

Updating Appointments

Use the Update Appointment window to modify an appointment including resources or attendees, appointment details, repeating appointments, and relevant notes and attachments.

Note updates are based on the HTML Notes data security rules. If you have appropriate access privileges, you can add new notes and attachments, update note text for an existing note, update note attributes for the Type and Visibility fields, and update attachments.

Note: After an update to a repeating appointment, you can further specify how you want the changes to be implemented. It can be applied only to the current appointment, or to the entire repeating series.

For adding new notes, see Using the Add Note Region, page 8- 2 in the Managing Notes in Oracle Applications Framework chapter.

For updating note attributes, see Viewing and Updating the Note History Region, page 8- 3 .

For updating note text, see Viewing and Updating the Note Details Page, page 8- 5 . See *Oracle Applications User's Guide* for Attachment details.

Perform the following steps to update an appointment.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Update Appointment window by clicking **Update** in the Appointment General window.

Steps

1. Update the appointment including header, details, a repeating appointment, and relevant related information.
2. If it is an repeating appointment, specify whether the changes are applied only to the current appointment, or to the entire repeating series.

See Also

- Creating Appointments, page 10- 2
- Viewing Appointments, page 10- 5
- Responding to Appointment INVITES, page 10- 7

Responding to Appointment INVITES

When you receive an invitation to an appointment, it displays in your calendar daily view. Click one of the invitation links to access the Respond to INVITE page where you can respond to the invitation.

Oracle Common Application Calendar allows you to respond to an INVITE in the following manners:

- Accept or reject a single invitation.
- Accept all or reject all of the repeating appointment invitations.
- Accept a previously rejected invitation if the Show Declined Appointments check box in the View Preferences page is selected.
- Reject a previously accepted invitation if the Decline button is visible.
- Add new notes and attachments.
- Update an existing note if you have appropriate security access.

Before responding to the invitation by either selecting the Accept or Decline button, you can change the default values for the Category and "Show Time As" fields in the Details region if needed. For example, select "Free" in the "Show Time As" field if you reject the invitation or "Busy" if you accept it so that your availability for the accepted appointment time becomes busy which will block future appointment reservations. However, if you accept the appointment and also want to keep the time slot open for other important events, you can select "Free" instead so that it will not block you from being invited to other activities.

After responding to the INVITE, you would find the invitation status displayed in the People and Resources tab changed from "Invited" to "Accepted" or "Rejected". In addition, relevant workflow notifications will be sent to the appointment owner after an invitee accepts or rejects an invitation.

If it is a repeating appointment, you can either reject all or accept all of them, instead of responding to each invitation individually.

Perform the following steps to respond to an invitation.

Prerequisites

An invitation must exist.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the calendar daily view.

Steps

1. Respond to an invitation by clicking the invitation link with the word "INVITE: Subject".
2. Select appropriate values in the Category and "Show Time As" fields if needed.
3. In the Respond to INVITE page, click **Accept** or **Reject** to accept or reject the invitation.
4. Click "Note History" link to add new notes attached to the appointment.

See Also

- Creating Appointments, page 10- 2
- Viewing Appointments, page 10- 5
- Updating Appointments, page 10- 6

Viewing Your Personal Calendar Views

Calendar allows you to view scheduled activities in daily and monthly views.

Daily Views

Depending on your calendar preferences, you can view the scheduled activities in the daily view page displayed in the following ways:

- Use Personal Calendar Daily View, page 10- 9 to view scheduled activities in a regular daily view
- Use Accessibility Daily View, page 10-10 to view scheduled activities in a daily view with detailed information

Note: To access the Accessibility Daily View window, you must choose either "Screen Reader" or "Yes" from the Accessibility Features list of values in the General Display Preferences page. If it is set to "No", then you can access the regular Personal Calendar Daily View page.

Monthly View

The Monthly View page allows you to view scheduled activities in a monthly view format. See [Viewing Personal Calendar Monthly View](#), page 10-11 for details.

See Also

- [Creating Appointments](#), page 10- 2
- [Viewing Appointments](#), page 10- 5
- [Updating Appointments](#), page 10- 6

Viewing Personal Calendar Daily View

Use calendar daily view to view scheduled appointments for today, or a specific day. Additionally, you can choose to display declined appointments, or open invitations in this daily view if they are selected in the [View Preferences](#) page.

Any scheduled activities are displayed in the corresponding time slots in calendar daily view based on the scheduled start time and duration. Click the scheduled appointment's subject link to view the appointment details. If an appointment will be repeated, you should see a repeating icon displayed in front of the subject link.

Additionally, you may also find attendees, location, and related items for your appointments in the order you selected for the First Detail, Second Detail, and Third Detail fields respectively in the [Calendar View Preferences](#) page, page 10-14.

From the calendar daily view, you can also create a new appointment and check resource availability.

Perform the following tasks to view schedules in the calendar daily view.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as [Oracle Sales Online](#).

Navigation

Navigate to the daily view of your Calendar.

Steps

1. Click **Today** to view the current date in calendar daily view.
2. Specify a particular day in the View field to access calendar schedule for that day.
3. (Optional) Create a new appointment with the current date.
4. (Optional) View the availability of resources.

See Also

- [Creating Appointments](#), page 10- 2

- Viewing Appointments, page 10- 5
- Updating Appointments, page 10- 6
- Viewing Accessibility Daily View, page 10-10
- Viewing Personal Calendar Monthly View, page 10-11

Viewing Accessibility Daily View

Use the Accessibility Daily View window to view all the details of scheduled activities displayed in tabular summary format for a given date including the activity time, duration, subject, location, attendees, reminder, and repeating information detailing how often an appointment will be repeated or not be repeated.

All the activities displayed in the window are based on the given start date. If an activity does not have start date, then this activity will not be displayed in this view.

By changing the date in the View field, you can view other activities for the selected date. To view all the activities for the current date, click the Today button. Additionally, you can create an appointment from this page with the selected date.

Note: You will not be able to access the Accessibility Daily View window unless you choose either "Screen Reader" or "Yes" from the Accessibility Features list of values in the General Preferences page or set the profile option "Self Service Accessibility Features" to "Screen Reader" or "Yes". Otherwise, you will access the regular personal calendar daily view.

Perform the following steps to view the Accessibility Daily View window.

Prerequisites

You must select the "Screen Reader" from the Accessibility Features list of values in the General Preferences page.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Accessibility Daily View window.

Steps

1. Enter an appropriate date in the View field to view all the activities for the selected date.
2. Click **Today** to view all the activities for the current date.
3. Click the subject link to drill down to the read-only appointment page.

4. (Optional) Create a new appointment based on the selected date.

See Also

- Creating Appointments, page 10- 2
- Viewing Appointments, page 10- 5
- Updating Appointments, page 10- 6
- Viewing Personal Calendar Daily View, page 10- 9
- Viewing Personal Calendar Monthly View, page 10-11

Viewing Personal Calendar Monthly View

Use the Monthly View page to view scheduled appointments for a particular month.

Note: Whether you can see appointments, declined appointments, or open invitations in your calendar monthly view depends on the preference settings in the Calendar View Preferences page or relevant parameter passed.

In the calendar monthly view, you will not only see the current month days, but also view the last few days of the previous month and the first few days of the next month displayed in white color. In order to easily distinguish weekdays from weekends, Calendar also marks the weekends in different colors in the monthly view. The weekends are determined based on the setup of the week start and end days in the preferences page.

You can view scheduled activities in your calendar monthly view in the following two ways:

- **Normal View.** By default, the Monthly View page will be displayed in a normal view which means that there will be only three scheduled activities displayed for each day. If there are more than three activities for a day, then click the **More...** link to access the Daily View page.
- **Full View.** The Monthly View page presented in full view displays all scheduled activities for a day, not just limited to three items.

Additionally, you may also find attendees, location, and related items for your appointments in the order you selected for the First Detail, Second Detail, and Third Detail fields respectively in the Calendar View Preferences page, page 10-14. By clicking the appointment subject link, you can drill down to see the read-only appointment details page.

Please note that depending on how the Monthly View page is integrated with your applications, you might see **Printable Page** appears on the page which allows you to print your monthly schedule in paper.

Perform the following tasks to view schedules in the calendar monthly view.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the monthly view of your Calendar

Steps

1. Specify a particular month and year in the View field to access calendar monthly view in normal format.
2. Click **Today** to view your current month.
3. Click **Full View** to view all scheduled appointments, not just three items, displayed in the monthly view.

See Also

- Creating Appointments, page 10- 2
- Viewing Appointments, page 10- 5
- Updating Appointments, page 10- 6
- Viewing Personal Calendar Daily View, page 10- 9
- Viewing Accessibility Daily View, page 10-10

Checking Resource Availability

Use the Check Availability window to search for the availability of resources that need to be included in an appointment, as well as to invite the selected people to the appointment based on availability.

Searching and Viewing Resource and Location Availability

To view the availability of resources for specific time, first specify appropriate date, start and end time, then search desired resources, and then add them to the availability view. Each selected individual resource's availability as well as the combination of all the selected resources are both displayed in the availability view table.

Additionally, you can book a location at the same time while checking resource availability by clicking **Add Location**. However, this feature is available only if you have a licensed install of Oracle Financials/Oracle Property Manager. Otherwise, **Add Location** is disabled. After finding a desired location, you can see the selected location is added to the availability view table along with the selected resources.

Use the Show or Hide hyperlink to list a resource's e-mail, phone, and office information or a location's suite, floor, and building information. This allows you to contact the resource directly for availability check if needed before inviting the resource to an appointment. The e-mail link can enable web mail compose window which allows you to send web mails through Oracle Collaboration Suite if profile options, "ATGCA: Enable Web Mail" and "ATGCA: Web Mail Server URL" are identified correctly.

See Integrating With Web Mail, *Oracle Common Application Components Implementation Guide* for setup details.

Creating an Appointment and Sending Invites

You can create a new appointment after checking resource availability. The time listed in the Create Appointment drop-down menu is synchronized with the availability view

start time. By changing the create appointment time and clicking the Go button allows you to create a new appointment with the updated appointment time. All attendees listed in the availability view are invited to the appointment. Attendees can respond to the INVITE shown in their personal calendar daily view.

Updating Attendees

You can update attendees by adding more resources or removing them from the availability view before creating an appointment. Since this window is also used in the Create Appointment and Update Appointment pages, you can update attendees later for an existing appointment.

In summary, you can perform the following tasks in the Check Availability window:

- Search resources based on name, date, and time
- Search location based on region, country, state, city, space type, building, and floor only if have a licensed install of Oracle Financials/Oracle Property Manager
- Check the availability for the selected resources
- Invite the resources for a new appointment as attendees
- Remove attendees from the appointment
- Add more resources to the existing appointment
- Create a new appointment based on the selected time

Perform the following steps to view the Check Availability window.

Prerequisites

The resource must be defined in the Resource Manager.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Check Availability window by clicking **Check Availability** in calendar daily view.

Steps

1. View resource availability for a given time.
2. Search for a resource and then add the selected resource to the Attendees availability view.
3. Click **Add Location** to search for a desired location for an appointment only if you have a licensed install of Oracle Financials/Oracle Property Manager.
4. (Optional) Create a new appointment based on the selected date and time.

Customizing Calendar Preferences

You can customize your calendar preferences in the following:

- Customizing Calendar View Preferences, page 10-14
- Customizing Calendar Default Preferences, page 10-15

Note: For more information regarding the General Display Preferences page accessed through the preferences link, see *Oracle Applications User's Guide*.

Customizing Calendar View Preferences

Use the calendar view preferences page to change the calendar time display interval and specify how you want your scheduled activities and work weeks to be displayed in your calendar views.

General Region

You can set calendar time display interval in the Display Increment field for your calendar daily view. For example, display time interval in calendar daily view by every 30 minute or one hour increments.

Item Settings Region

Identify which scheduled activities you want them to be displayed in your calendar views. Additionally, to be able to distinguish appointments between declined appointments and open invitations, Calendar allows you to set display color and prefix for the selected activities that you want them to be displayed in your calendar views. The prefix can have up to 20 characters.

For example, if green is chosen for appointments and with prefix "Appt", then all appointments will be displayed in green and have prefix "Appt" in front of each appointment name in your calendar daily view. This way you can easily differentiate appointments from declined appointments if they are in red with prefix "RejAppt".

Item Details Region

Use this region to specify detailed preferences for a selected item in the order you want to display in the calendar daily view.

For example, if "Appointment" is selected in the Item Settings region, you can identify the detailed values for appointments using the First Detail, Second Detail, and Third Detail fields. If "Attendees", "Location", and "Related Items" are selected for the first, second, and third detail fields respectively, then when viewing scheduled appointments from your personal calendar views, you should see all attendee's names, such as John Walsh and Lisa Jones, listed first right after an appointment's subject link, then followed by location, such as HQ-1-1000, and then followed by the related item, such as Lead. If the Third Detail field is left blank, then you will not be able to see the related item (Lead) displayed after the location information for the appointment.

Work Week Settings

Use this region to customize which days to be displayed in your monthly view including the beginning of each week, your working days, and whether your non working days would be shown in your calendar with different color. For example, start your work week on Sunday, show only Monday, Wednesday and Friday as working days, and leave non working days, Sunday, Tuesday, Thursday, and Saturday shown in different color.

Perform the following steps to customize calendar view preferences.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Calendar View Preferences window by clicking the **Preferences** link and **View Preferences** from side navigation.

Steps

1. In the Item Settings region, specify which items that you want them to be displayed in the calendar views.
2. Select colors and enter prefix for your displayed items.
3. Select appointment attributes in the First Detail, Second Detail, and Third Detail fields.
4. In the Work Week Settings region, specify your week's start day, identify your work days, and whether you want to show non working days in your calendar views.

Customizing Calendar Default Preferences

Use the Calendar Default Preferences page to set personalized default values for appointment fields as well as to add and delete categories that are used to classify appointments or tasks.

Setting Default Preferences

Use the Defaults page to set personalized default values for the following appointment fields:

- **Type.** This field classifies the purposes of your appointment creation, such as Follow Up, or Meeting. You can change the default "General" to other type if needed.
- **Duration.** This field determines how long the appointment would be, such as one hour, or 30 minutes.
- **Priority.** This field defines the urgency or an importance rating for an appointment, such as low, high, medium, and critical.
- **Access.** This field determines the accessibility of an appointment. It has the following values you can select from the drop-down list:
 - **Private:** Only the appointment owner has the privilege to read and update the appointment.
 - **Normal (Default):** The owner and invitees can read and update the appointment if they have appropriate privileges.
- **Reminder.** This field allows you to specify when you want to be reminded for an appointment. The default value is "Do not Remind Me".
- **Show As.** This field sets the default availability status for an appointment.

- **Location.** This field allows you to enter free-form text, such as "My office", indicating where an appointment should be held.

You can update these default values when creating an appointment.

Updating Categories

In the Categories region, you can add new categories by clicking the Add 5 Rows button, remove categories, and reset default category by clicking the Set As Default button. Please note that you can reset the default category from "Unfiled" to other category, but you cannot delete it since the delete icon for "Unfiled" is not visible.

Perform the following steps to set default preferences.

Responsibility

Responsibilities to access the applications that are integrated with Calendar in Oracle Applications Framework, such as Oracle Sales Online.

Navigation

Navigate to the Calendar Preferences window by clicking the **Preferences** link and **Defaults** from side navigation.

Steps

1. Select default values for the fields in the Appointment region.
2. Add new categories in the Categories region by clicking **Add 5 Rows**.
3. Select a category name and set it as the default value.

Introduction to Oracle Notes

This chapter covers the following topics:

- Overview of Oracle Notes
- Oracle Notes Key Features
- Oracle Notes Integrations
- Terms and Definitions

Overview of Oracle Notes

The Notes module provides a quick and easy way to enter in any information for an Oracle Applications business object. It is useful for attaching information such as directions, special instructions, or reminders. One or more people with access to the business object may enter in a note; therefore, it is collaborative in nature. It is historical and archivable, and may be further linked to Oracle Attachments. The Notes module can be accessed through both Forms and HTML versions.

Note: With recent expansion, the Notes module for Oracle Common Application Calendar adopts Oracle Applications Framework, the standard HTML development and deployment platform for Oracle HTML Applications. It provides essential notes functionality for integrated applications. The Notes module in Oracle Applications Framework is not fully compatible with HTML Notes user interface. For use feature, see Chapter 8, Managing Notes in Oracle Applications Framework. For detailed implementation and use features of the integrated applications, consult product specific documentation.

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.

Oracle Notes Key Features

The following are key features of the Notes module in Forms and HTML:

- The Notes module can hold free form text up to 2000 characters for a regular note, and can be extended to hold text up to 32KB for a large note.
- 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 standalone 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 standalone HTML Notes module, then all the notes that you create for yourself appear in the Notes Summary window. These standalone notes are considered your personal notes and can only be created through the standalone 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 standalone notes can be related to other business objects allowing you to view the note from various windows. Contextual and standalone notes can be marked as private, which means the note can only be viewed by the user that created it.

Oracle Notes Integrations

The Notes module regardless of the Forms-based or HTML version 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.

Terms and Definitions

The following table describes Notes terms and definitions.

Notes Terms and Definitions

Term	Description
Attachment	An attachment is any document associated with one or more application 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.
Note Status	There are three statuses available for notes: • 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 standalone 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

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.

Summary of Oracle Notes Tasks

Use Oracle Notes to perform the following types of tasks:

- Chapter 13, Managing HTML Notes
- Chapter 14, Viewing Note Information
- Chapter 15, Searching for a Note
- Chapter 16, Data Security for HTML Notes
- Chapter 17, Using Forms-based Notes

Managing HTML Notes

This chapter covers the following topics:

- Creating a Note
- Adding an Attachment
- Viewing and Updating Existing Attachments
- Using the Relate To Function

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: A public note is visible only to the Oracle E-Business Suite users, not to external users such as guest users, parties, partners, and supplier contacts.
- Publish: A publish note is publishable and visible to everyone if the integrated application decides to publish the note.

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.

Adding an Attachment

You can add attachment from the Note Details window.

See HTML Calendar, page 34-12 for 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.

Viewing and Updating Existing Attachments

See HTML Calendar, page 34-10 for Viewing and Updating Existing Attachments.

Using the Relate To Function

You can associate one or more business object to a Note. For example, a note can 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.

It is important to note that desired references (or Relate To) can be mapped to a source during implementation. Only the mapped references are listed in the list of value options. If none of the references is mapped to your object, then all references will be displayed in the list of values. How to map references to a source object, see *Defining Notes References Mapping, Oracle Common Application Components Implementation Guide*.

The Relate To drop-down list of values is driven by a source object. If the default value of Relate To is deleted, then you will not be able to see the notes when trying to search by Relate To. These notes can be retrieved when filtered under Source. For example, if a note is created for a task, then Task Manager becomes the default value in the Relate To field. If the default Task Manager is removed, then you can only view the note if Source is selected from the drop-down list in the Notes Summary window. You won't see the note if Relate To is selected as the search criteria.

Perform the following steps to relate a business object to a note.

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 an appropriate value from the Type drop-down list.
2. Enter a name that corresponds to the type.
3. Search for a name.
4. Remove a relate to object if needed.

Viewing HTML Note Information

This chapter covers the following topics:

- Using the Notes Summary Window
- Viewing All Notes
- Viewing Note Details

Using the Notes Summary Window

Use the Notes Summary window 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.

Note: If your Notes module is integrated with another application within Oracle E-Business Suite (Context Sensitive window), there is a filter on the Notes Summary window where you can search by either the source of the note, or the relate to information.

Perform the following steps to view the Notes Summary window.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to any Notes window.

Steps

1. Click the note name hyperlink to view the note's details.
2. Click the icon in the Text column to view additional text added to the note.
3. Click the **paperclip** icon in the Attachments column to add or update an attachment.

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.

Perform the following steps to view all notes.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Notes Summary window and click **All Notes**.

Steps

1. The All Notes window lists your notes.
2. Click the **Note** icon to open the Note Details window.

Viewing Note Details

Based on the HTML Notes security rules, you can perform the following tasks in the Note Details window:

- Update note's secondary information including note type, status, relate to and attachment: You can modify this secondary information for an existing note only if you have an appropriate privilege. Be aware that you cannot update the actual note information.
- 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: Using the Relate To Function, page 13- 2 .
- Delete a note: You can delete an existing note by clicking the Delete button if you have "JTF_NOTE_DELETE" function granted to you. After deleting a note, you are directed to the Notes Summary window.

See Data Security for HTML Notes chapter for HTML Notes security information. How to grant security access for HTML Notes, see Customizing HTML Notes Security chapter, *Oracle Common Application Components Implementation Guide*.

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 standalone 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 and click note name to access the Note Details window.

Steps

1. Modify note type, status, attachment, or relate to information as needed.
2. Delete an existing note if you have appropriate access privilege.

Searching for HTML Notes

This chapter covers the following topics:

- Using the Quick Find Search
- Searching for a Note

Using the Quick Find Search

Use the Quick Find search to find your appointments, tasks, notes, employees, and groups.

Based on the HTML Notes security rules, Oracle E-Business Suite users can find public notes and published notes from the Quick Find search. External users such as guest users, parties, partners, and supplier contacts can search for published notes only. Private notes can only be retrieved by the creators.

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.

Searching for a Note

Use the Notes Search window to search all user created 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. You can select multiple note types using the [Ctrl] key to search for notes which provides you with the flexibility to include or exclude notes of certain types.

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 existing notes.

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 multiple note types if necessary.
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**.

Data Security for HTML Notes

This chapter covers the following topics:

- Overview
- HTML Notes Security Rules

Overview

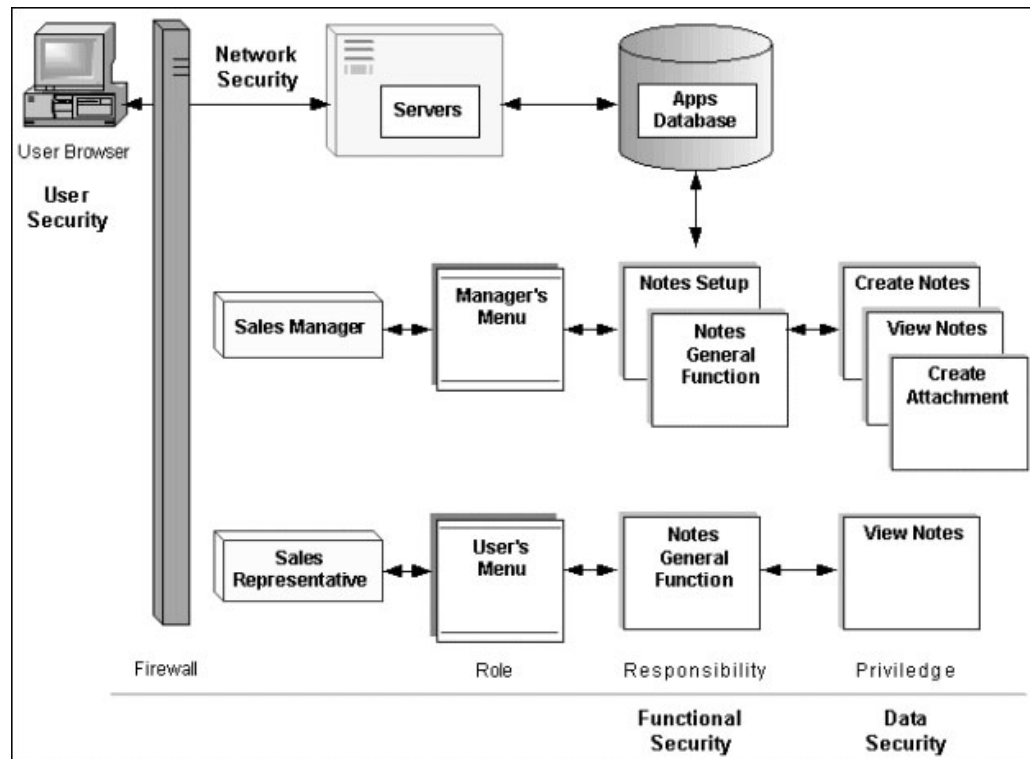
When a note is created or attached to a business object, it may contain confidential data that is only meant to be viewed by specific users. Oracle HTML Notes module provides a flexible system of access privileges that restricts the ability to view note data to the appropriate users. This system is based 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. In Notes, data security is used to give different accesses to users. For example, Sales Managers can be granted access to create and delete "Confidential" and "Non-Confidential" notes whereas Sales Representatives can be granted access to only "Non-Confidential" notes.

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*.

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

Note: By default, you can create, view, and update a large note and a note's secondary information including note type, status, relate to, and attachment information. However, system administrators can update the Notes security rules and grant you various security privileges. As a result, whether you can view or update a note is dependent on your security access privileges.

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 delete a note

You can delete existing notes only if you are granted with the note deletion privilege. Otherwise, the Delete button will not be visible in the Notes Details window. After deleting a note, you are directed to the Notes Summary window.

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 Customizing HTML Notes Security chapter, *Oracle Common Application Components Implementation Guide*.

Using Forms-based Notes

This chapter covers the following topics:

- Creating Notes
- Finding Notes

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.

Creating Notes. You can enter up to 2000 characters of text in the Notes field. If your note exceeds 2000 characters, click the **More** button to enter an additional 32kb of text in the Note Details window.

Once your note is created, you cannot update the note. However, you can update the note details. Note that integrated applications might customize notes features, see product specific documentation for details.

Viewing Notes. 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 note text in the Notes field. If your note exceeds 2000 characters, click **More** to enter an additional 32kb of text in the Note Details 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, page 17- 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, page 17- 1

Introduction to Oracle Assignment Manager

This chapter covers the following topics:

- Overview of Oracle Assignment Manager
- Oracle Assignment Manager Integrations
- Ownership and Resources
- Viewing resources in the Gantt Chart or Table Layout
- Assigning a Process
- Selecting Assignment Criteria
- Terms and Definitions

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.

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.

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

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.

Oracle Assignment Manager Integrations

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

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.

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.

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

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, page 18- 3
 - Assisted Assignment Option, page 18- 5
 - Unassisted Assignment Option, page 18- 6
- Assigning Resources, page 18- 4
 - Assisted Assignment Option, page 18- 5
 - Unassisted Assignment Option, page 18- 6
 - Intelligent Assignment Option, page 18- 7
 - Window to Promise Assignment Option, page 18- 8

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, expediter, 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.

Assigning Ownership

Option	Description
Assisted Assignment Option, page 18- 5	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, page 18- 6	Use this option to assign a task or document without specifying the criteria, or to overrule the criteria set.

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.

Assigning Resources

Option	Description
Assisted Assignment Option, page 18- 5	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, page 18- 6	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, page 18- 7	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.
Window to Promise Assignment Option, page 18- 8	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.

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, page 18- 6
- Intelligent Assignment Option, page 18- 7
- Window to Promise Assignment Option, page 18- 8
- Viewing and Assigning Resources in the Gantt Chart, page 21- 1
- Viewing Resource Web Availability in the Gantt Chart, page 21- 3
- Viewing Support Site Name Information in the Gantt Chart, page 21- 4
- Viewing a Resource's Product Skills Rating, page 21- 5

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, page 18- 5
- Window to Promise Assignment Option, page 18- 8
- Viewing and Assigning Resources in the Gantt Chart, page 21- 1

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.

Note: 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, page 18- 5

- Assisted Assignment Option, page 18- 5
- Unassisted Assignment Option, page 18- 6
- Window to Promise Assignment Option, page 18- 8
- Viewing and Assigning Resources in the Gantt Chart, page 21- 1

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.

See Also

- Assisted Assignment Option, page 18- 5
- Unassisted Assignment Option, page 18- 6
- Intelligent Assignment Option, page 18- 7

Viewing resources in the Gantt Chart or Table Layout

Assignment Manager displays the details of qualified and preferred resources in two formats, the Gantt chart and a table layout. The Gantt chart provides a comprehensive view of resources including identifying information, schedules, and attributes in graphical format. The table layout provides a simplified version of this information that is better suited for accessibility requirements. When Assignment Manager displays resource information, you can view that information in the Gantt chart by clicking View in Gantt, or in the table layout by clicking View in Table. Assignment Manager uses the Gantt chart as the default method for displaying resource details.

The Gantt Chart

The Gantt chart provides a quick graphical overview of the scheduled tasks based on a specific period of time. The right side of the chart displays the calendar schedule and booking related details of the resource and the left side displays its attributes

Resource Attributes

The Gantt chart displays the following resource attributes:

- Resource Name

- Resource Type
- Web Availability - Yes/No
- Skill Name
- Support Site
- Primary Resource - Yes/No

Calendar data

The Gantt chart uses different colors to display calendar data for a resource. The following table describes the resource calendar displayed in the Gantt chart:

Calendar Data in Gantt Chart

Calendar Data	Color	Description
Shift schedules	Yellow background	Displays available shifts within a specific date range. Shifts are determined in the Forms-based calendar.
First available time slot	Green bar	Displays the first available time slot for a work assignment.
Assigned tasks	Optional (blue default)	Displays work assigned within a shift. The work is color-coded based on setup data. The setup data denotes the color to be used for any specific task based on task attributes.
Escalated tasks	Red bar	Displays escalated tasks within a shift.

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

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

Determining the Available Time for a Resource

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.

Example 1

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.

Example 2

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.

Determining 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.

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: - 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.

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.
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.

Table Layout

The table layout provides a simple tabular view of resource details that can be accessed entirely using the keyboard. It does not display details about the resource shifts and the current bookings of the resource, which can only be viewed only from the Gantt layout

Resource Attributes

The table layout displays the following resource attributes:

- Resource Name
- Resource Type
- Web Availability - Yes/No
- Skill Name
- Support Site
- Primary Resource - Yes/No

Calendar Data

The table layout displays the first available slot for a given work assignment in two columns, Start Time and End Time. The information displayed in each column is formatted in date time format. For example:

- Start Time = 01-JAN-2003 10:00:00
- End Time = 01-JAN-2003 13:00:00.

The first available slot is derived from the shifts assigned to the resource and the existing workload.

Features

The table layout contains the following features:

- Users can navigate to the table layout page by selecting the "View in Table" tab.
- Users can navigate from one resource record to another by using the Up and Down Arrow keys on the keyboard.
- Navigating to a record in the tabular format selects the Resource and populates its details in the fields below the tab page. The selected resource may be returned to the calling document using the 'Ok' button.
- Clicking "Resource Details" launches the Resource Manager form in query mode and displays the details for the currently selected resource.
 - If the resource is "GROUP", the group detail form appears.
 - If the resource is "TEAM", the team detail form appears.
 - For all other resources, the "RESOURCE DETAIL" form appears.
- Clicking "Resource Details" while the view is focused in the "View in Gantt" tab, launches the resource manager UI for the currently selected resource.
- Clicking "OK" returns a resource to the calling document.

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, page 18-12
- Assignment Manager Selection Criteria, page 18-13

Assignment Manager Dependencies

The following table describes Assignment Manager's required dependencies.

Dependencies

Dependency	Description
Preferred Resource Information	A preferred resource is a single person or a resource group that is defined in Oracle Contracts or 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.

Assignment Manager Selection Criteria

The following table describes Assignment Manager's selection criteria.

Assigning Resource Availability

Criteria	Description
Preferred Resources, page 18-13	The first criterion the Assignment Manager considers in the assignment process.
Territories, page 18-15	Territories are used to retrieve all the qualified resources for the assignment from the winning territories.
Resource Availability, page 18-15	The availability of the resource is considered after a preferred or qualified resource, based upon territories, is selected.

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.

Service Lines and Business Processes

When Assignment Manager displays preferred resources, it either lists them as a group with their associated service line, or it lists them according to the individual business processes with which they are associated. For example, if a company may have three preferred engineers, John, Mary, and Jacob that are associated with a service line called "Printer Support". When fetching resources for this company's printer problem, Assignment Manager returns John, Mary, and Jacob as the preferred engineers.

When servicing this company's printer problem, however an Assignment Manager user such as a customer service representative may also wish to list its preferred resources according to individual business processes such as Customer Support (teleservice), Field Service, and Depot Repair. For example, John, may be the company's preferred Teleservice engineer, Mary its preferred Field Service engineer, and Jacob its preferred Depot Repair engineer. If the company wishes to speak to an engineer on the telephone regarding its printer problem, then John is the preferred engineer. If it wishes to have an engineer dispatched to repair the printer on site then Mary is the preferred engineer, and if it wishes to have the printer sent away for repairs, then Jacob is the preferred engineer.

The returned resources for service lines and business processes are the same, but they are categorized differently.

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.

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.

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.

Selecting Assignment Criteria

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

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.

Terms and Definitions

The following table describes the Assignment Manager terms and definitions.

Assignment Manager Terms and Definitions

Term	Description
Assignee	An assignee is the designated person who commits to fulfill a specific task or an assignment.
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.
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 chapter covers the following topics:

- Accessing the Oracle Assignment Manager Interface
- Summary of Oracle Assignment Manager Tasks

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 standalone 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 standalone 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.

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 covers the following topics:

- Overview
- Assisted Assignment Option
- Unassisted Assignment Option
- Intelligent Assignment Option
- Assigning with the Window To Promise

Overview

Assignment manager contains the following assignment options:

- Assisted Assignment Option
- Unassisted Assignment Option
- Intelligent Assignment Option
- Window To Promise Assignment Option

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 standalone 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 and click **Search**. If your search criteria includes the following, then Assignment Manager executes the search by default:
 - The Assisted option is selected
 - The calling document is either a Service Request, a Task, or an Escalation
 - The search takes place in Contracts, Install Base, or Territories.
3. If the resulting Gantt chart search result display is empty, then modify the selection criteria and click **Search** again.
4. 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.
5. Edit the preferred Start Time and End Time if needed.
6. Select the Display Task Details check box to display the tasks that are assigned to a resource in the GANTT chart.
7. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without saving your changes.

See Also

- Ownership and Resources, page 18- 3
- Unassisted Assignment Option, page 20- 3
- Intelligent Assignment Option, page 20- 4
- Window To Promise Assignment Option, page 20- 4
- Viewing and Assigning Resources in the Gantt Chart, page 21- 1
- Viewing Resource Web Availability in the Gantt Chart, page 21- 3
- Viewing Support Site Name Information in the Gantt Chart, page 21- 4
- Viewing a Resource's Product Skills Rating, page 21- 5

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.

Responsibility

Since Assignment Manager is not a standalone 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**.
Assignment Manager displays a maximum of thirty found resources in the Gantt chart.
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. Select the Display Task Details check box to display the tasks that are assigned to a resource in the GANTT chart.
7. 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, page 21- 1
- Ownership and Resources, page 18- 3
- Assisted Assignment Option, page 20- 1
- Intelligent Assignment Option, page 20- 4
- Window To Promise Assignment Option, page 20- 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.

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 covers the following topics:

- Overview
- Viewing and Assigning Resources in the Gantt Chart
- Viewing Resource Web Availability in the Gantt Chart
- Viewing Support Site Name Information
- Viewing a Resource's Product Skills Rating

Overview

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

- Viewing and Assigning Resources in the Gantt Chart, page 21- 1
- Viewing Resource Web Availability in the Gantt Chart, page 21- 3
- Viewing Support Site Name Information in the Gantt Chart, page 21- 4
- Viewing a Resource's Product Skills Rating, page 21- 5

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, page 18- 2 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. Select the resource using one of the following options:
 1. Double-click the resource to view the resource name, resource type, start and end time information. You can manually change the start and end time, and the date, before clicking **OK** to save the assignment.
 2. Right-click the resource to view resource details. This opens a Resource Manager form in query mode that displays the following:
 - Group Details page if the selected resource is a group
 - Team Details page if the selected resource is a team
 - Resource Details page for all other resources.
5. 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.

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 Manager:

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.

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.

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.

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
- Notes and Calendar Integration
- Terms and Definitions

Overview of Oracle Task Manager

Task Manager provides methods for quantifying, responding to, and managing units of work generated by Oracle E-Business Suite applications. The unit of work is defined in Task Manager in the form of a task. A given task may be defined and bound by units of time, may be assigned to one or more qualified resources or resource groups or teams (see Assignment Manager for further information when assigning resources to tasks in Forms), and can be tracked and statused by the application that the work was generated from.

Task Manager can be accessed through integration applications or as a standalone module. For example, Oracle Telesales uses Task Manager to assign tasks pertaining to individual consumers, organizations, and organizational contacts. You can also use standalone Task Manager to create personal tasks or todos. Using the Tasks features, you can create a single or a repeating task with specified repeating frequency, assign resources to a task, mass creating tasks, mass reassigned tasks to new owners or assignees, view tasks using personalized saved searches. Additionally, you can synchronize tasks that appear in HTML Task Manager to and from the offline devices (a Palm or Outlook) connected to your personal computer if you have required setup and configuration.

Note: With recent expansion, Task Manager for Oracle Common Application Calendar adopts Oracle Applications Framework, the standard HTML development and deployment platform for Oracle HTML Applications. It provides essential task functionality for integrated applications, such as Oracle Sales Online, Service Online, and Customers Online. Task Manager in Oracle Applications Framework is not fully compatible with HTML Task user interface. For basic use feature, see Chapter 9, Managing Tasks in Oracle Applications Framework. For detailed implementation and use features of the integrated applications, consult product specific documentation.

The following topics provide additional information on the Task Manager:

- What is a Task?, page 22- 2
- Task Manager Roles, page 22- 2
- Task Manager Notifications, page 22- 3

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.

Task Manager Roles

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

Rights of Roles

Roles	Description	Rights
Owner	The person who is in charge of the task.	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. As an owner you can: • 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.	The assignee can reassign the task to other resource types. As an assignee you can: • 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

Task Manager Notifications

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

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
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

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, page 22- 4
- Task Dependencies, page 22- 4
- Task References, page 22- 5
- Tasks Dates, page 22- 5
- Task Contacts, page 22- 5
- Task Recurrences, page 22- 5
- Other Task Information, page 22- 5
- Task Audits, page 22- 6

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 among task templates and use the offset feature to separate the sequence between task templates with time-sensitive

restrictions. This functionality of dependencies and offset field is enforced only during the tasks automated creation using task templates.

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.

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.
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 templates are defined, you can specify resource requirements, create dependencies and use the offset feature to separate the sequence between task templates with time-sensitive restrictions, 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.

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.

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

Terms and Definitions

The following table describe terms associated with Task Manager.

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.
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.

Term	Description
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

Accessing the Oracle Task Manager Interface

There are several ways to access Task Manager. It can be run as a standalone 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

CRM Application Foundation 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** to open the Task Summary window.

Summary of Oracle Task Manager Tasks

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

- Chapter 24, Viewing Task Information
- Chapter 25, Managing Tasks
- Chapter 26, Managing Task Preferences
- Chapter 27, Managing Task Contacts
- Chapter 28, Data Security for HTML Tasks
- Chapter 29, Working with Forms-based Tasks
- Chapter 30, 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
- Viewing Task Hierarchy

Viewing the Task Summary

Use the Task Summary to:

- View a list of your tasks
- Create a new task by clicking the Create button
- Create a quick task by clicking the "Create Quick Task" button if it is visible
- Update task fields by changing the value through the drop-down list
- Update task details by clicking the task number hyperlink
- Remove tasks
- Select to display another saved search in addition to seeded query "My Open Tasks"
- View parent/child tasks in a tree hierarchy by clicking an enabled Hierarchy icon in the Hierarchy column

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

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

Be aware that the Hierarchy icon is enabled only if a task has a parent or child task. How to view parent or child tasks in a hierarchical tree structure, see: Viewing Task Hierarchy, page 24-11.

Seeded Query "My Open Tasks"

HTML Task Manager provides a seeded query "My Open Tasks" which allows you to search for only the tasks where the user is the owner and assignee. If a task is owned by or assigned to a group or team that you belong to, then that task will not be retrieved from the "My Open Tasks" seeded query.

Be aware that you cannot delete the seeded query "My Open Tasks".

- 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.
7. Click the task link with Hierarchy icon enabled to view all associated parent and child tasks in a tree hierarchical structure. See: Viewing Task Hierarchy, page 24-11.

See Also

Customizing your Task Summary Display Options, page 24- 3

Using the Quick Find Search

Use the Quick Find search to find your appointments, tasks, notes, employees, and groups.

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. See the *Oracle Common Application Components Implementation Guide*, Appendix B, for 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 execute the query.
3. Click any item to display the details.

Customizing Your Task Summary Display Options

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

For example, in order to easily identify if a task has any parent or child tasks associated, you must redefine your task search criteria by moving "Hierarchy" from the Available Columns listed in ascending order to the Displayed Columns and then save your search. In addition, if you want to view tasks with customer information, you can move "Customer Name" from the Available Columns to the Displayed Columns and save your 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 to select the Saved Search you want to modify.
2. Scroll down to the Display Options region.
3. From the Available Columns listed in alphabetic order, select which columns you want to appear in the Task Summary window. For example, select "Hierarchy" from the available column lists. 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 Columns or click ">>" to move all the undisplayed columns over to the Displayed Columns.
5. Delete your saved searches if necessary.

Guidelines

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

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	This column can be customized for your specific business needs.

Column Name	Description
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.
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.

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
 - Customer Name
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, page 24- 1
- Personalizing Your Saved Searches, page 24- 7

Personalizing Your Saved Searches

In addition to the seeded query "My Open Tasks", Task Manager allows you to 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.

When searching tasks from the seeded "My Open Tasks" saved search, only the tasks that the user is the owner and assignee will be displayed in the Task Summary window. If a task is owned by or assigned to a group or team that you belong to, then that task will not be retrieved from the "My Open Tasks" seeded query.

To be able to list that task, you must perform a search separately by creating another saved query which will show all tasks that the user is the owner and assignee, as well as all tasks that the group or team that the user is a member of is listed as the task owner or assignee.

Deletion of Saved Search Records

You can delete your saved search records except the seeded search "My Open Tasks". After each deletion, you are directed to the Task Search screen with a confirmation message.

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. For example, in the Assignments region, the default setting is to search tasks with any role since the option button "Task with Any Role" is selected. This allows you to search for tasks that you are neither the owner nor the assignee, but with view access.

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:
 1. Enter the task Subject to search for a task.
 2. Enter the Task Number.
 3. From the Status multi-select list box, select the task status.
 4. From the Types multi-select list box, select the task type.
 5. From the Priority multi-select list box, select the task priority.
 6. From the Category multi-select list box, select the task category.
 7. Select the **Include Private** check box to include your private tasks in your search.
 8. Use the drop-down list to select the source.
 9. Enter the name that corresponds to the source or click **Go** to access the lookup window and search for the name.
2. Under the Created By region, use the drop-down list to select the resource type that created the task.
3. Enter the (Resource) name or click **Go** to search for the resource name.
4. In the Assignments region, define the following information:
 1. Select the My Tasks option button to search for tasks you own or that are assigned to you.
 2. Select the Task with Role option button to search for tasks assigned to another owner or assignee.
 3. Use the drop-down list to select the role. Options include: All, Assignee, or Owner.
 4. Use the drop-down list to select the resource type.
 5. Enter the resource name or click **Go** to access the lookup tool and search for the name.
 6. If you want to enter additional search criteria, repeat the steps from 4b to 4e in the provided fields.
5. In the Dates and Times region, define the following information:
 1. Use the drop-down list to select the task date type. Options include Planned, Scheduled, or Actual.
 2. Click the **Date Picker** icon next to the From text field to select the date range for the task.
 3. Use the drop-down lists to select both the hour and minute the task began.
 4. Click the **Date Picker** icon next to the To text field to select the date the task ended.
 5. Use the drop-down lists to select both the hour and minute the task ended.
6. In the Customer Details region, define the following information:
 1. Use the drop-down list to select the customer type. Options includes: Customer Name, Customer Number, or Account Number.

2. Enter the Customer Value or click **Go** to access the lookup tool to search for the value.
7. Enter the following reference information:
 1. Use the drop-down list to select the resource type.
 2. 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 flexfield information.
9. See the following for additional information on the remaining tables of the Task Search window:
 1. To define display options, see Customizing Your Task Summary Display Options, page 24- 3 .
 2. To select sort options, See Selecting Sort Options, page 24- 5 .
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. Clear your personalized search criteria if needed.
12. 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.
13. Delete your saved searches except the seeded search "My Open Tasks" if necessary.

See Also

- Viewing the Task Summary, page 24- 1
- Creating a Task, page 25- 1
- Viewing Task Hierarchy, page 24-11

Viewing Task Details

Any applicable values entered in the Create Task window are carried over to the Task Details window. In addition to updating or deleting an existing task in the Task Details window, you can also view task hierarchy if a task has a parent or child task associated.

In the heading of the Task Details window, you can see the source name, source document number, task subject, and task number for the task. Click the Source document number link to view the source of an existing task or click the subject link to view the details of that record.

If a task has a parent or child task associated, you can also find the Hierarchy icon displayed next to the source document field. Otherwise, this icon becomes invisible. Click the Hierarchy icon to access the Task Hierarchy window for the current task with all its associated parent or child tasks displayed in a tree hierarchical structure

starting from the root. In addition, if you have appropriate access privileges to access the parent task, you should also see an icon enabled for the parent task number that allows you to drill down to the actual parent task. Otherwise, this parent task icon becomes invisible if you don't have the security access granted to you.

Updating Customer Information

You can update the task information by modifying appropriate fields including customer contacts. However, any updates to the customer for an existing task will remove the existing contacts for the task. After an update, the customer name and number are changed, and the contacts and contact points for the former customer are also removed from that task. Therefore, you must select new contacts from the newly added customer for that task.

Note: If a product integrated with Task Manager passes customer data into the system, the information automatically populates the customer area of the Task Details window based on the source.

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 Details window.

Steps

1. Click **Task** on the main navigation bar.
The Task Summary window opens.
2. Click the task number hyperlink to access the Task Details window. You can view or modify the task information.
3. Click the Hierarchy icon if it is visible to access the Task Hierarchy window.
4. Click the parent task icon if it is visible to access the actual parent task.
5. Save your changes if you modify the task.

See Also

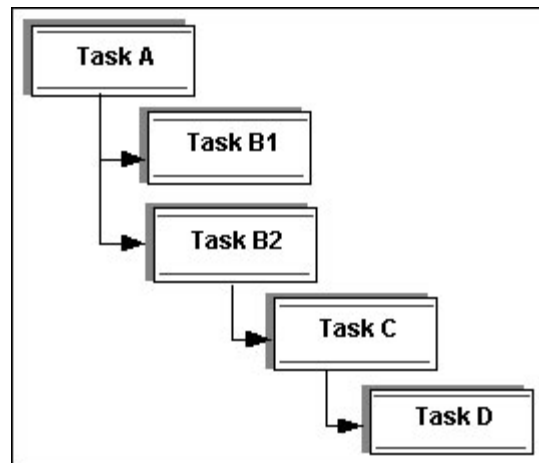
- Viewing the Task Summary, page 24- 1
- Creating a Task, page 25- 1
- Viewing Task Hierarchy, page 24-11

Viewing Task Hierarchy

Since a task can have many child tasks associated, in order for you to view the parent-child relations for a given task, HTML Task Manager groups these tasks together in a tree hierarchical format and adds a new column "Hierarchy" in the Task Summary window. If a task has a parent or child task, the Hierarchy icon becomes enabled for that task in the Hierarchy column. Clicking on the enabled Hierarchy icon, you are taken to the Task Hierarchy window displaying a hierarchical tree with all associated parent and child tasks, starting from a node.

The following diagram illustrates the task hierarchical tree structure:

Task Hierarchical Tree Structure



Task A is the root and Task D is the leaf node. Clicking on Task C would display the hierarchical tree, starting from root Task A to leaf node Task D.

With the ability to view task hierarchy in a tree structure, managers can easily understand the whole process of a task or an opportunity which lasts for weeks or more than one month and has child tasks and notes associated. In addition, they can easily identify and follow up on each child task if necessary.

In the Task Details window, if a task has a parent or child task associated, the Hierarchy icon is displayed next to the Source document field. Click the Hierarchy icon to access the Task Hierarchy window for the current task with all its associated tasks starting from the root.

View Parent/Child Tasks With Task Security

In the Task Hierarchy window, you can view the hierarchical tree structure of a given task. However, the access of each task in the tree hierarchy is aligned with the security access you have in Tasks.

- If a task appears in a tree node with "Task Number: Subject" hyperlink, such as "[1234 : Installation](#)", then you have the access privilege for that task. Click the hyperlink to access the Task Details window.
- If a tree node appears with "No Access" label, then you don't have the privilege to access that task.

You can navigate back to the Task Summary window by clicking the View Summary button.

Display Hierarchy Column in the Task Summary Window

By default, the "Hierarchy" column is not visible in the Task Summary window unless you choose to display the column from the Task Search window.

In order to display the Hierarchy column, you must redefine your task search criteria by moving "Hierarchy" from the Available Columns list to the Displayed Columns list and then save your search. Select your new saved search from the drop-down list and perform a search, you should be able to see the Hierarchy column displayed in the Task Summary window.

Perform the following steps to view the task hierarchy for a given task.

Prerequisites

A task must have a parent or child task associated. It is recommended to have the Hierarchy column displayed in the Task Summary window.

Responsibility

CRM Application Foundation User

Navigation

Navigate to the Task Summary window.

Steps

1. From the Saved Searches drop-down list, select your saved search with Hierarchy added to the Displayed Columns.
2. Click **Search** to perform a task search based on your selected search criteria.
3. Click the task with the Hierarchy icon enabled in the Task Summary window.
4. In the Task Hierarchy window, you can view all associated parent and child tasks displayed in a tree hierarchical structure.
5. Click any of the parent or child task links in a tree node to access the Task Details window.
6. If a tree node appears with "No Access", then you don't have the privilege to access that task.
7. Click **View Summary** to go back to the Task Summary window.

Guidelines

By default, the "Hierarchy" column is not visible in the Task Summary window unless you choose to display the column from the Task Search window. To do so, you must move "Hierarchy" from the Available Columns list to the Displayed Columns list and then save your search.

See Also

- [Viewing the Task Summary, page 24- 1](#)
- [Customizing Your Task Summary Display Options, page 24- 3](#)
- [Selecting Sort Options, page 24- 5](#)
- [Personalizing Your Saved Searches, page 24- 7](#)
- [Viewing Task Details, page 24- 9](#)

Managing Tasks

This chapter covers the following topics:

- Creating a Task
- Defining Dates for the 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 and Updating Existing Attachments
- Adding an Attachment
- Viewing Your Task Bin
- Editing Your Task Bin
- Reassigning Tasks
- Synchronizing Tasks

Creating a Task

You can create tasks through the following two ways based on your business needs:

- Create a Regular Task, page 25- 1 : Click the Create button in the Task Summary window to access the Create Task window
- Create a Quick Task, page 25- 5 : Click the "Create Quick Task" button in the Task Summary window to access the Create Quick Task window to quickly create a light version of a task if the button is visible

To be able to see the "Create Quick Task" button, your system administrators must set the profile option "Task Manager: Create Quick Task" to Yes.

Create a Regular Task

Use the Create Task window to create a new task by entering the following information:

- Basic Task Information

- Task Dates
- Task Assignments
- Customer Information
- Task References Information
- Additional Task Information

Basic Task Information

Enter basic task information including task type, subject, description, priority, status, categories, and parent task. You can use drop-down menus to select desired task information.

For task types and priorities, 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 Priorities, Oracle Common Application Components Implementation Guide* and *Defining Task Types, Oracle Common Application Components Implementation Guide*.

Please note that the Priority field can be defaulted by the profile option "Task Manager: Default Priority". If there is no default value for the profile option, then you will see "Unprioritized" displayed in the Priority field during task creation.

Select the Private check box if this task is considered a private task. Click the Notify check box if you want to notify assignees of the newly created task.

If you are creating a child task for another task, then search a parent task by task subject or task number if necessary. However, child and parent tasks must have the same source, such as Service Request. For example, the child task cannot have the source as Lead and the parent task cannot have the source as Service Request.

Task Dates

Enter appropriate dates for your task including time zone, task start and end dates and time for planned, scheduled, and actual dates, as well as duration.

You must select the "Use For Calendar" button for one of the planned, scheduled, or actual task dates. HTML Calendar uses this button to determine which date would be used for your task when displaying it in your personal calendar views. Additionally, when a task is displayed in a personal calendar, these task start and end dates are essential to the resources availability calculation which is used to determine whether the resources assigned to the task are considered as Free, Busy or Tentative available.

Note: You can set the default time zone either in the calendar preferences or the Client timezone profile option. The value overrides each other.

Task End Date Based on Start Date and Duration

After you enter start date and duration values for a task, the task's end date and time will be automatically calculated based on the start date and time plus the duration value chosen.

If a task has start date and time but without end date, then the following profile options will be checked first to determine the task end date:

- Task Manager: Default Duration. If this profile is set, the end date will be automatically calculated based on the start date and time plus the duration.
- Task Manager: Copy Start Date to End Date. If this profile is set, then the end date will be directly copied from the start date.

Condition 1: Only One Profile Option Is Set

If only one profile is set, then the end date is defaulted based on the profile.

Condition 2: Both Profile Options Are Set

If both profiles are set, then the "Task Manager: Default Duration" overrides the profile "Task Manager: Copy Start Date to End Date" which means the end date is the start date and time plus the duration.

During the task updates, you can update the end date, but the duration field will be displayed only if the calculated duration matches one of the values in the drop-down menu. Otherwise, the duration field will be set to Null.

In addition, do not leave both the start and end time fields blank. Otherwise, the task you created will be visible in the un-timed area in your personal calendar views.

Task Assignments

In the Assign To region, you can search for appropriate resources of any types by first name, last name, or user name as an owner or assignees for this task.

In general, the task creator is automatically defaulted to be an owner of the task. The task creator has the ability to:

- View and update all fields within the task
- Reassign an owner to the task if necessary
- Assign resources (assignees) to the task

After creating a task, you can use the Assignments window to update or add more resources to a task. See: Assigning a Resource to a Task, page 25-11.

Customer Information

In the Customer region, you can specify customer type of organization, person, or relationship for your task. Select a customer name based on the selected customer type. Use the phone number drop-down list to select an appropriate number for the customer.

You must enter customer information here so that customer's contacts, not employee contacts, can then be specified later in the Contacts window. See: Defining Task Contacts, page 27- 2 .

You can update customer information later for an existing task. However, any updates to the customer for an existing task will remove the existing contacts for the task. After an update, the customer name and number are changed, and the contacts and contact points for the former customer are also removed from that task. Therefore, you must select new contacts from the newly added customer for that task.

Task References Information

In the References region, depending on the source object, Task Manager automatically displays all the reference information that will be created for the organization, person, and relationship as read-only text.

In addition, since desired references (or Relate To) can be mapped to a source during implementation, only the mapped references are listed in the list of value options. If none of the references is mapped to your object, then all references will be displayed in the list of values. How to map references to a source object, see: *Defining Notes References Mapping, Oracle Common Application Components Implementation Guide*.

If there are more than one mapped objects, a list of reference information will be displayed for further selection.

For example, the following reference information should be displayed for a task if it is created for:

- An organization party. The reference information includes reference type "Party" and reference name that is an organization's name.
- A person party. The reference information includes reference type "Party" and reference name that is a person's name.
- A relationship party. The reference information includes reference type "Party" and reference name that is the relationship, the person, and organization of the relationship.
- An opportunity. The reference information includes reference type "Sales Opportunity", the customer of the opportunity, and the primary contact of the opportunity in the reference section.
- A lead. The reference information includes reference type "Sales Lead", the customer of the lead, and the primary contact of the lead in the reference section.

This reference information allows you to easily identify business objects with similar features or attributes for future references. 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.

After creating a task, you can use the References window to update or add more references or business objects to a task. In addition, you can also drill down to the actual references by clicking the object number links if you have appropriate access privileges. See: *Relating Tasks to Source Objects*, page 25-10.

TASK REFERENCE 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 Vision Corporation)
 - The party who is the subject of the relationship (Jeff Walsh)

- The organization which is the object of the relationship (Vision 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 Vision Corporation, then system will automatically delete the contact "John" as well as the relationship information "John at Vision Corporation", but it will leave the organization "Vision Corporation" unchanged in the system.

Additional Task Information

Enter additional task information if needed for name, application, and context value fields.

- 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.

Creating a Quick Task

Instead of creating a regular task, you can choose to quickly create a simple task, a light version of a task, by clicking the "Create Quick Task" button if it is shown in the Tasks Summary window. You proceed to the Create Quick Task window to enter the following information:

- Combination of Basic Task and Date Information
- Task Assignments
- Task References Information

To create a simple task, you need to enter combination of basic task elements (type, name, description, and category) and date information (date, start and end time), and optionally enter resource assignments and task references information.

Features of Quick Tasks

Since a quick task is a light version of a regular task, there are some restrictions in quick task:

- The date type (planned, scheduled, or actual) for a quick task is defaulted to the value set in the profile option "Task Manager: JTF Tasks Default Date Selected".

This is because you can only enter one date with appropriate start and end time, but without specifying start or end date.

- A quick task must be a public task.
- A quick task cannot be a child task as you cannot specify a parent task.

After creating a quick task, you can still update the task in the Task Details window.

For details on task assignments, references, and task dates, see: *Creating a Regular Task*, page 25- 1 .

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

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

Steps

1. Define the following information.
 1. 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.
 2. Enter a subject for the task.
 3. Enter a description for the task.
 4. 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.
 5. Select the duration field from the drop-down list for your task.
 6. Select the task status from the drop-down list.
 7. Select the task category from the drop-down list.
 8. 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.
 1. Search for a parent task either by task subject or number and click **Search**.

A list of tasks appears in the window.

2. 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:
 1. To define a date, see Defining Dates for a Task, page 25- 7 .
 2. To define assignees, see Assigning a Resource to a Task, page 25-11.
 3. To enter customer information, See Associating a Task with a Customer, page 25- 8 .
 4. To relate an object to a task, see Relating Tasks to Source Objects, page 25-10.
 5. Enter additional task information for the name, application, and context value fields if needed.
5. 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, page 24- 1
- Viewing Task Details, page 24- 9
- Adding and Removing Task Categories, page 35- 8

Defining Dates for the Task

Use the Dates region in the Create Task window to enter task time zone, duration, start date and end date.

Task Duration and Task End Date

With the duration field specified in task heading, task end date and time can be automatically calculated based on the start date and time plus the duration.

During the task updates, if you update the start date, then end date should be recalculated based on duration. However, if you update the end date, the duration will be displayed only if the calculated duration matches one of the values in the drop-down menu. Otherwise, the duration field will be set to blank.

The duration can be defaulted to the value set in the profile option "Task Manager: Default Duration". Your administrator can change its default value "No Duration" to your desired time frame. This profile is used to determine a task end date if the task has start date and time, but without end date. In this situation, system will check whether both profile options, "Task Manager: Default Duration" and "Task Manager: Copy Start Date to End Date", are all set. If so, then the "Task Manager: Default Duration" overrides the other one.

Do not confuse the task duration here with the effort duration in the Efforts window.

- **Task Duration:** It is the planned duration that a task might take. This field is similar to the duration field used in appointment creation screen. The default duration can be changed by the profile option "Task Manager: Default Duration".
- **Effort Duration:** It 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).

Note: The default task date is set to "Scheduled", but you can manually override it by selecting another option button and then specify task start and end dates in the corresponding fields.

Task start and end dates are essential fields for a task to be displayed in your personal calendar if the "Display on Calendar" check box in the Assignments window is selected.

Perform the following steps to define dates 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. In the Dates region, select the time zone information. This overrides the time zone set in your calendar preferences.
2. Select duration for the task.
3. 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.
4. Select start date and time as well end date and time for the task.

See Also

- Personalizing Your Saved Searches, page 24- 7
- Creating a Task, page 25- 1

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.

You can update customer information for an existing task. However, any updates to the customer for an existing task will remove the existing contacts for the task. This is because the contacts are linked through the customer on the task. After an update, the customer name and number are changed, and the contacts and contact points for the former customer are also removed from that task. Therefore, you must select new contacts from the newly added customer for that task.

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 Vision Corporation), then one reference for that person or organization will be created. If the customer type is Relationship (such as Jeff Walsh at Vision Corporation), then three associated party references will be created:

- The relationship itself (such as Jeff Walsh at Vision Corporation)
- The party who is the subject of the relationship (Jeff Walsh)
- The organization which is the object of the relationship (Vision 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.
 1. Enter at least three characters and click **Search**.
A list of account numbers appear in the window.
 2. 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.

1. Enter at least three characters and click **Search**.
A list of customers appear in the window.
2. 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, page 24- 7
- Creating a Task, page 25- 1

Relating Tasks to Source Objects

Use the References window to modify or add more references for a task.

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. You can drill down to the actual references by clicking the object number links if you have appropriate access privileges.

See Customizing Task Security, *Oracle Common Application Components Implementation Guide* for 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.

See Also

- Personalizing Your Saved Searches, page 24- 7
- Creating a Task, page 25- 1

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.

When searching for resources of any types, you can search by first name, last name, or user name. In addition, 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 Vision Corporation)
- The party who is the subject of the relationship (Jeff Walsh)
- The organization which is the object of the relationship (Vision 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 creation of 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.

Note: You can change the owner of a task but you cannot delete the owner altogether.

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

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 Type in the Owner or Assignee Roles field.
3. Enter the first name, last name, or user name of the resource that you want to assign to the task or click **Go** to search for a resource.

The search window opens.

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

A list of resources appear in the window.

2. 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
 - E-mail address
 - Phone number information automatically populates, if available.
6. Save the assignment information.

Guidelines

Click the **Remove** check box to delete a selected resource. If you manually delete a resource name in the Name field without changing the resource type, the selected resource, regardless of 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 try to delete a resource name in the Assignments window.

See Also

- Personalizing Your Saved Searches, page 24- 7
- Creating a Task, page 25- 1

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.)

After specifying the efforts, click the Update button to save your change.

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 the define the Task Effort.

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) listed in ascending order 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, page 25- 1

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.

- 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.
 1. Select None and the task does not repeat.
 2. Select Daily and enter the number of days you want the task to repeat.
 3. Select Weekly and enter the number of weeks and select the check box for each day you want it to occur.
 4. Select Monthly and enter the number of months and select the check box for each day you want it to occur.
 5. 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, page 25- 1

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. Tip text provides information about the distinction between the group and team concepts for marketing applications.
2. Enter the name of the resource or click **Go** to search for the resource.
 1. Enter at least two characters in the search field and click **Search**.

A list of resources appear in the window.
 2. 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 **Clear** to clear all text.
6. 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, page 25- 1

Viewing and Updating Existing Attachments

See HTML Calendar, page 34-12 for Viewing and Updating Existing Attachments.

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 HTML Calendar, page 34-12 for Adding an Attachment.

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.

Note: When you switch to another calendar that you are subscribed to, your calendar and task bins still reflect your personal appointments and tasks.

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 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.

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.

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.

- 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, 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.

Be aware 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 to search for the corresponding resource.
5. Select the option button of the resource.

6. Select the check box of the tasks you want to reassign or click **Select All** to select all tasks.

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, page 37- 1](#)
- [Required Setups and Configuration, page 37- 2](#)
- [Terms and Definitions, page 37- 5](#)
- [Synchronization of Tasks, page 37-10](#)
- [Palm and Outlook Synchronization FAQs, page 37-20](#)
- [Troubleshooting Tips, page 37-24](#)
- [Field Mappings, page 37-25](#)

See Also

- [Synchronization of Appointments, page 37- 7](#)
- [Synchronization of Business Contacts, page 37-14](#)

Managing Task Preferences

This chapter covers the following topics:

- Defining Your Preferences
- Setting User Preferences
- Viewing Notifications in Your Worklist

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, page 35- 1
- Adding and Removing Task Categories, page 35- 8

Setting User Preferences

You can receive either e-mail 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**.

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

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.

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, page 27- 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.

When searching for a customer's contact, you can search either by contact's first name or last name. After a search, you can see the matched contact names displayed with specified text either by last or first name. 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 Vision 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 Vision Corporation, then system will automatically delete the contact "Jeff Walsh" as well as the relationship information "Jeff at Vision Corporation", but it will leave the organization "Vision 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's first or last name or click **Go** to perform a search.

1. Enter at least two character in the search field and click **Search**.
A list of resources appear in the window.
2. 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 e-mail 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, page 27- 1

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, page 37- 1
- Required Setups and Configuration, page 37- 2
- Terms and Definitions, page 37- 5
- Synchronization of Business Contacts, page 37-14
- Palm and Outlook Synchronization FAQs, page 37-20
- Troubleshooting Tips, page 37-24
- Field Mappings, page 37-25

See Also

- Synchronization of Appointments, page 37- 7
- Synchronization of Tasks, page 37-10

Data Security for Tasks

This chapter covers the following topics:

- Overview
- HTML Task Security Rules
- Task Security in the Oracle Applications Framework and Forms based Tasks

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 leveraging the Application Object Library (AOL) data security model provides 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. This AOL security was initially used in HTML Tasks only.

To allow product specific security added to the existing AOL task security, and to extend the task data security offerings specifically for task related resource assignments to the Forms-based Tasks and to the Oracle Application Self-Service Framework based Tasks recently developed for Oracle Common Application Calendar, Task Manager enhances the AOL data security based on Virtual Private Database (VPD) policy, a feature implemented in database to allow security dynamically created at runtime to all queries issued against a database table or view. This new security model with VPD feature provides more flexibility in task security for resource assignments by allowing any applications to set product specific security rules around the existing task security.

For example, not every resource can create, view, or update a service related task of certain types. Only the resources that have privileges to access certain types of service request can be assigned to the service related tasks of the same types as assignees. Therefore, with this enhanced security model, Oracle Service Online can pass its own security functions to Tasks in Forms or in Oracle Applications Framework to allow qualified resources to be retrieved from the resource list of values when assigning them to a task within the service request of certain types.

Note: This security model with VPD feature only applies to task security for resource assignments in the Forms-based and Oracle Applications Framework based Task Manager. It is not implemented in task security rules currently used in HTML Tasks.

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

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 provides additional security rules for users to access the tasks of either standalone or context sensitive tasks. In addition, based on the group hierarchy defined in Resource Manager, group managers can have full access or read only access privilege to their 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.

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).

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 Standalone 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 that is either assigned to the task or is the owner of the task
 - Belongs to the team that is either assigned to the task or is the owner of 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 further 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 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. To implement this manager-directs security, see Customizing Tasks Security chapter, *Oracle Common Application Components Implementation Guide*.

Task Security in the Oracle Applications Framework and Forms based Tasks

Based on the existing task security rules used in HTML Tasks, users if they have appropriate privileges can view or update a task created in Oracle Applications Framework.

In addition, since Task Manager allows product specific security rules added to the existing AOL task security used for the resource list of values assignment in Forms and in Oracle Applications Framework, if service related security rules are used in a service request assignment, users may only see the resources that are qualified for the service rules from the resource list of values (LOV) when assigning them to a service related task.

Task Security Rules Access Details

Task Manager in Oracle Applications Framework provides the following security rules:

- For the Contextual Tasks
- For the Standalone Tasks
- For the Resource List of Values Security
- For the Manager-Direct Security Access

The only security rule currently available in Tasks Forms is the resource list of values security.

For the Contextual Tasks in Oracle Applications Framework

When updating a contextual task developed based on the Oracle Applications Framework, whether you have "Full Access" or "Read Only Access" is determined by the following values set in the "Task Manager: Set Context Data Security" profile option:

- Full Access (default value): This value turns the security OFF, so that all the tasks related to the context can be viewed, updated, and deleted.
- Security Access: This value turns the security ON for all task instances within context and allows you to have either Full Access or Read Only security access to the task.

When Read Only access is granted, you can see a read-only page displayed in the Update Task window. Otherwise, an updatable page will be displayed.

For the Standalone Tasks in Oracle Applications Framework

For the standalone tasks, such as personal to dos created for a sales agent through Oracle Sales Online, the system will check the user security access based on data security. The user can have Full Access or Read Only access privilege.

For the Resource List of Values Security in Forms and Oracle Applications Framework Based Tasks

Users with different privileges may see different resources options populated in the list of values (LOV) when trying to assign resources (assignees) to a task in Forms and in Oracle Applications Framework. These privileges can be customized by your system administrators and then granted to a user, user groups, or members of resource group.

If product specific security rules are used in selecting resources for a service request, users might see only the resources who have privileges to access certain types of service request populated from the assignee LOV.

In the Forms-based Tasks, security is based on object metadata definition. If product specific security rules are used, users can see secured task views based on the product security rules. Since tasks can be queried only in read-only format, product specific rules will not be modified in the standalone Tasks forms. To update these contextual tasks, for example tasks created for service requests, you should use the parent application to query the source document, such as service request, first and then update the contextual tasks. Additionally, these product specific privileges are defined and maintained by the relevant products. How to use this feature, see product specific documentation for details.

Note: The resource list of value security access discussed here is restricted to the assignee list of values with resource types of employee, group, and team.

Manager-Direct Security Access for Tasks in Oracle Applications Framework

Similar to the manager-direct security rule in HTML Tasks, Task Manager in Oracle Applications Framework allows group managers to access their direct's tasks with appropriate privilege.

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

Creating, Updating, and Finding Tasks

Use the Task window to create and update a task, or use the Find Tasks window to search for tasks created with or without templates.

Searching For Tasks

Enter search criteria in the Find Tasks window to search for desired tasks. These criteria include basic task elements, information about owner, assignee, customer, and task dates. Additionally, you can also search for open tasks, escalated tasks, or any tasks created from a task template group if appropriate criteria are selected.

For example, if the **"Show Only Open Tasks"** check box is selected, then Task Manager filters out any task status with a flag "Cancelled", "Rejected", "Closed", or "Completed" and only shows task with "Open" task status. If this box is not checked, then all tasks with any statuses will appear in your search results. If the **"Show Only Escalated Tasks"** check box is selected, then Task Manager will search for all escalated tasks of all escalation levels.

Updating Tasks

Task Manager allows you to use the standalone Forms-based Tasks to update standalone tasks, but not contextual tasks created from other source objects, such as service request. This is because updates made in the standalone Tasks forms may break some of the business rules that are enforced in the source business object. Instead, you should use the parent business object's specific Task screens, such as service request screen, to update the contextual tasks.

Note: Task Manager can prevent you from updating contextual tasks in the standalone Forms-based Tasks if the **From Task** check box in

the metadata JTF Object is not selected or set to "N" which means that some product specific business rules are enforced on the task created. Therefore, you should not use the standalone Forms-based Tasks to update the contextual task in the case of breaking the business rules.

However, for backward compatibility, Task Manager allows you to update tasks created from other source objects if the value of profile option "Task Manager: Restricted Task Update" is changed to "No". The default value is set to "Yes", which means that by default tasks created from other sources with the **From Task** check box not set cannot be updated in the standalone Forms-based Task Manager.

Warning: It is strongly recommended that not to change the profile value to "No" as it may break any product specific business rules enforced during task creation and updates. For example, if you update field service request's tasks in the standalone Forms-based Tasks, it will cause scheduling issues in Field Service Scheduler.

When updating customer information for an existing task, it is important to note that any updates to the customer will remove the existing contacts for the task. After an update, the customer name and number are changed, and the contacts and contact points for the former customer are also removed from that task. Therefore, you must select new contacts from the newly added customer for that task.

Additionally, 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 creation of duplicated references.

Creating Tasks

After clicking the New button in the Find Tasks window, you are directed to the Tasks window to create tasks in the following ways:

- Create tasks from a task template, page 29- 2
- Create tasks individually, page 29- 3

Creating Tasks from Templates

Tasks can be created simultaneously from a task template if an appropriate task template has been created during the implementation.

For example, a service department constantly receives requests to fix computer problems. To accomplish this assignment usually involves three required tasks including customer appointment, computer repair, and progress update. A service director could request 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 task type, priority, and status.

To create tasks from a template, you must select the "Create Task from Template" button. Enter the following information in the Create Tasks from Template Group window:

- **Template Group:** Select a template group from the LOV, such as "PC Repair" since this template group consists of three task templates that are used specifically for service requests regarding computer problems.
- **Source Document:** This field displays automatically after the template group is identified. For example, the PC Repair template group is tied to the source document Service Request during the setup.
- **Source Value:** Enter the document number that these tasks are to be created for. For example, if you create tasks associated with a service request, then you need to select the request number as the source value. If creating tasks from a template for a standalone task, you can select any number as the source value. The selected number will not have impact on the task creation.
- **Owner Type:** Enter the type of owner that will be assigned to all these three tasks, such as Employee Resource.
- **Owner:** Select the specific owner based on the previous value. For example, if you select Employee Resource you must select a person.

Clicking the "Create Tasks" button will create multiple tasks from the selected template simultaneously.

Creating Tasks Individually

You can create a single task in the Tasks window by entering appropriate task information including subject, type, status, priority, description, and other task information.

The values of the task type, status, and priority fields can be defaulted from the relevant profile options. If selecting the values from the type and priority fields, you will see only the mapped task types and mapped task priorities to your source object from the 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.

Please note that the Priority field can be defaulted by the profile option "Task Manager: Default Priority". If there is no default value and this field is left blank during task creation, this field will be defaulted to "Unprioritized" in the task update screen.

Additionally, enter dates and customer information for your task. Click the More button to specify task details using the following tabs:

- Use the Resources tab to define resource requirements. See: Assigning and Scheduling Resources, page 30- 1 .
- Use the Dependencies tab to enter task dependencies. See: Setting Dependencies for Tasks, page 29- 6 .
- Use the References tab to enter task references. See: Linking Tasks to Source, page 29- 7 .
- Use the Contacts tab to enter the customer contact information. See: Documenting Multiple Contact Information, page 29- 9 .
- Use the Recurrences tab to enter the recurrence rules. See: Scheduling Recurring Tasks, page 30- 2 .

- Use the Audit tab to view the task history information. See: Tracking a Task Record, page 30- 4 .

Note: If you want to change or limit the values shown in task types, priorities, statuses, or references list of values, see the following sections in the *Oracle Common Application Components Implementation Guide*:

- Defining Task and Notes Reference Mapping
- Defining Task Statuses and Status Transition Rules
- Defining Task Priorities
- 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 Tasks window, enter any of the following search criteria and click **Find**:
2. Enter the following search criteria in the general task information:
 - Number
 - Subject
 - Description
 - Type
 - Status
 - Priority
 - Source Document
 - Source Value
 - Parent Task
3. You can provide additional information to search for a task in the following regions:
 - Owner
 - Assignee

- Customer
 - Dates
4. In the Filters region, you can select the following check boxes to search for a task:
 - Select the **Show Only Open Tasks** check box if you only want to view tasks with a status of "Open".
 - 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.
 6. Use one of the following procedures to create a task:
 1. 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**.
 2. 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.
 7. Enter customer information for your task.
 8. Save your task and click **More**.
 9. Define resource requirements by selecting the Resources tab. See: Assigning and Scheduling Resources, page 30- 1 .
 Enter the task dependencies by selecting the Dependencies tab. See: Setting Dependencies for Tasks, page 29- 6 .
 10. Enter the reference objects by selecting the References tab. See: Linking Tasks to Source, page 29- 7 .
 11. Enter the customer contact information by selecting the Contacts tab. See: Documenting Multiple Contact Information, page 29- 9 .
 12. Enter the recurrence rules by selecting the Recurrences tab. See: Scheduling Recurring Tasks, page 30- 2 .
 13. View the task history information by selecting the Audit tab. See: Tracking a Task Record, page 30- 4 .
 14. Save your task. The new task number appears in the Create Task window.
 15. If you want to update a task, then perform the following steps:
 1. Navigate to Task Manager.
 2. In the Find Tasks window, enter search criteria and click **Find**.

3. Update the information in the window.
4. 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, page 29-10

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 and offset field is enforced only during the tasks automated creation using task templates.

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. Enter a numeric value in the Offset field plus an appropriate unit of measure, such as one hour or 30 minutes, to separate the initial task template from a subsequent task template. 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.

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

Perform the following steps to set task dependencies.

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, page 29- 1
- Assigning and Scheduling Resources, page 30- 1
- Linking Tasks to Source Documentation, page 29- 7
- Documenting Multiple Contact Information, page 29- 9
- Setting Task Flags, page 29- 8
- Tracking a Task Record, page 30- 4

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, page 29- 1
- Assigning and Scheduling Resources, page 30- 1
- Setting Dependencies for Tasks, page 29- 6
- Documenting Multiple Contact Information, page 29- 9
- Setting Task Flags, page 29- 8
- Tracking a Task Record, page 30- 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, page 29- 1
- Assigning and Scheduling Resources, page 30- 1
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Documenting Multiple Contact Information, page 29- 9
- Tracking a Task Record, page 30- 4

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, page 29- 1
- Assigning and Scheduling Resources, page 30- 1
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Documenting Multiple Contact Information, page 29- 9
- Tracking a Task Record, page 30- 4

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 e-mail or worklist notification when a task is created or updated.

See Also

Creating, Updating, and Finding Tasks, page 29- 1

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

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, page 29- 1
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Documenting Multiple Contact Information, page 29- 9
- Scheduling Recurring Tasks, page 30- 2
- Setting Task Flags, page 29- 8
- Tracking a Task Record, page 30- 4

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, page 29- 1
- Assigning and Scheduling Resources, page 30- 1
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Documenting Multiple Contact Information, page 29- 9
- Setting Task Flags, page 29- 8
- Tracking a Task Record, page 30- 4

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, page 29- 1
- Assigning and Scheduling Resources, page 30- 1
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Documenting Multiple Contact Information, page 29- 9
- Scheduling Recurring Tasks, page 30- 2
- Setting Task Flags, page 29- 8
- Tracking a Task Record, page 30- 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, page 30- 3
- Creating, Updating, and Finding Tasks, page 29- 1
- Assigning and Scheduling Resources, page 30- 1
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Setting Dependencies for Tasks, page 29- 6
- Linking Tasks to Source Documentation, page 29- 7
- Documenting Multiple Contact Information, page 29- 9
- Scheduling Recurring Tasks, page 30- 2
- Setting Task Flags, page 29- 8

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 HTML Calendar Integrations
- Terms and Definitions

Overview of Oracle HTML Calendar

HTML Calendar manages daily activities, appointments, and schedules of applications resources as well as calendar events generated by various Oracle E-Business Suite applications, such as marketing events and sales meetings. Using the calendar features, a user may create appointments, tasks, notes, and other calendar events, invite attendees for the appointment, and view scheduled activities through various daily, weekly, combination, and monthly calendar views.

Additionally, HTML Calendar provides an effective mechanism to manage group activities by using group or public calendars. With an approval from Calendar Administrator for a new group or public calendar request, 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 them from your personal activities. Furthermore, if you have required setup and configuration, you can also synchronize appointments that appear in HTML Calendar with your offline devices, such as Palm or Outlook, connected to your personal computer.

Note: With recent expansion, Calendar for Oracle Common Application Calendar adopts Oracle Applications Framework, the standard HTML development and deployment platform for Oracle HTML Applications. It provides essential calendar functionality for integrated applications such as Oracle Sales Online. Calendar in Oracle Applications Framework is not fully compatible with HTML Calendar user interface. For basic use feature, see Chapter 10, Managing Appointments in Oracle Applications Framework. For detailed implementation and use features of the integrated applications, consult product specific documentation.

The following topics provide additional information on Calendar:

- Calendar Rules, page 31- 2
- Types of Calendars, page 31- 3
- Calendar Views, page 31- 4
- Who Uses Calendar?, page 31- 5

The following table describes the main navigation bar links.

Navigation Bar Link Descriptions

Link	Description
Views	Click this link to access the different views (daily, weekly, monthly, yearly, or combination) of your personal calendar and to check a resource's availability.
Tasks	Click this link to access the Task Summary window. Use this window to view all your tasks and to access the Create Task window.
Notes	Click this link to access the Notes Summary window. Use this window to create a note, search for a note, attach a document to a note, view all notes, or view details of a particular note.

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, page 16- 2 , Data Security for HTML Notes chapter about the notes security access.

Types of Calendars

The following are the different types of calendars available for viewing in Calendar.

- Personal Calendars, page 31- 3
- Public Calendars, page 31- 3
- Group Calendars, page 31- 4

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

Public calendars are generally used for publishing details like Holidays which can be used by any users to view it in the monthly view format. For example, a public calendar for Australian holidays, a user in United States can view the Australian public calendar for which all the holidays are defined before scheduling a marketing campaign targeting Australia customers.

In addition, public calendars can be used to publish any information that is not targeted to a specific group of people.

Public calendars can only be created through the request of a new group calendar, but used as a public calendar in the Request New Group window. After being approved by the Calendar Administrator, the requestor becomes the owner of the public calendar who will be responsible for future appointment creation and updates for that public calendar.

To create appointments for a public calendar, the public calendar owner needs to use switch calendar functionality. All appointments created for a public calendar must be classified as "public" appointments. They cannot be "private".

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.

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.

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.

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.

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.

Oracle Calendar Key Features

The following are key features of Calendar:

- Managing Appointments, page 31- 6
- Personalization and Preferences, page 31- 7

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.

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.

Integration with Notes and Tasks

A note provides a record of descriptive information that is generated and referenced by the user. Use Notes to add additional information to an appointment. The key 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.

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.

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.

Terms and Definitions

The following table describes terms and definitions associated with Calendar.

Terms and Definitions

Term	Description
Category	Use a category as a way of organizing tasks and appointments. For example, the task can be a business activity and the category could be official.
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.
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 e-mail, 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

Accessing the Oracle HTML Calendar Interface

Each module integrated with Calendar has an individual login. Perform the following steps to log in to Calendar.

- 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.

Summary of Oracle HTML Calendar Tasks

Use Oracle HTML Calendar to perform the following types of tasks:

- Chapter 33, Viewing Your Calendar
- Chapter 34, Managing Appointments
- Chapter 35, Customizing Your Calendar Preferences
- Chapter 36, Administering Group Calendars
- Chapter 37, 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 Your Calendar Simultaneously
- Viewing the Availability of a Resource
- Adding a New Resource to Your Availability View
- Viewing a Public Calendar

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 allows you to view the previous or next day, week, month, or year.

When viewing tasks in calendar views including daily, weekly, monthly, combination, and public calendar views, if "Display Task Customer and Source" is set to "Yes" in personal preferences page and if a task has a source and it is not "Task Manager" or "Appointment", you can also find customer names and source names displayed in the hyperlink format along with the tasks. Click the hyperlink to see the source object if it is set up correctly in the JTF Object meta-data table.

Daily View

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.

Weekly View

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.

Monthly View

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.

In addition, in order to easily distinguish week days from weekends in the monthly views, HTML Calendar marks the weekends in different colors in the monthly view. The weekends are determined based on the setup of the week start and end days in the Calendar Personal Preferences page. For example, start your weeks from Monday and end Friday. Saturday and Sunday will be considered as weekends and automatically marked in different colors in the monthly view. As a result, you can easily identify weekends and avoid making any appointments on those days.

Yearly View

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.

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, page 33- 3
- Viewing the Availability of a Resource, page 33- 5
- Viewing a Public Calendar, page 33- 7

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 to open the Go to Date window or click the Date on the calendar to display the dates daily view.
4. Perform the following tasks in the Go to Date window:
 - Select the Day you want to view.
 - Select the Month you want to view.

- Select the Year you want to view.
- Select the option button of the view you want to display.

See Also

- Viewing Your Personal Calendar, page 33- 1
- Viewing the Availability of a Resource, page 33- 5
- Viewing a Public Calendar, page 33- 7

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.

In addition, if "Display Task Customer and Source" is set to "Yes" in personal preferences page and if a task has a source and it is not "Task Manager" or "Appointment", you can also find customer names and source names displayed in a hyperlink format along with the tasks in the combination view.

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.

See Also

Viewing the Task Summary, page 24- 1

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.

Searching for Resources

To search for resource availability, first perform a search to locate the resource. In the search result window, you can see the resource name along with phone number, email, and job title information which allows you to contact the resource directly for further availability verification before adding the resource to the Availability view.

Viewing Resource Availability

After adding a resource is added in the Availability view, you will not only be able to view the resource availability, but also able to see the selected resource's phone number displayed next to the resource name in a hyperlink format which enables e-mail compose window if clicking on the resource name. As a result, you can contact the selected resource directly either by phone or e-mail for availability check before scheduling an appointment. The unavailable time displays in red, and the available time displays in blue. The combination of all the selected resources' availability is shown in the Combined row.

In addition, you can send web mails through Oracle Collaboration Suite from the Availability window if profile options, "ATGCA: Enable Web Mail" and "ATGCA: Web Mail Server URL" are identified correctly.

For setup details, see: *Integrating With Web Mail, Oracle Common Application Components Implementation Guide*.

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 the 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 time 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, page 33- 1
- Viewing Different Dates on the Calendar, page 33- 3
- Viewing a Public Calendar, page 33- 7

- Adding a New Resource to Your Availability View, page 33- 7

Adding a New Resource to Your Availability View

Use the Availability window to add a resource's schedule 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.

Perform the following steps to add a new resource to your availability view.

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**.
2. Search for a resource in the Search and Select window.
 1. Enter at least one character in the search field and click **Search**.
 2. Select the option button of the resource name or user name you want to add and click **Select**.
3. Click **Add** to add the Resource to the multi-line text field.
4. Click **Apply** to add the resource to the availability window.

See Also

- Viewing Different Dates on the Calendar, page 33- 3
- Viewing the Availability of a Resource, page 33- 5
- Viewing a Public Calendar, page 33- 7

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 search for a public calendar.
 1. Enter at least one character in the search field and click **Search**.
 2. Select the option button of the Calendar you want to view and click **Select**.
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**.
4. Click **Today** to return to the current month of the public calendar you are viewing.

See Also

- Viewing Your Personal Calendar, page 33- 1
- Viewing Different Dates on the Calendar, page 33- 3
- Viewing the Availability of a Resource, page 33- 5

Managing Appointments

This chapter covers the following topics:

- Using the Quick Find Search
- Using the Advanced Search
- Viewing and Updating Appointment Details
- Creating an Appointment
- Deleting an Appointment
- Defining Attendees for an Appointment
- Responding to an Invitation
- Creating a Repeating Task or Appointment
- Viewing and Updating Existing Attachments
- Adding an Attachment
- Relating Appointments to Source Objects
- Working with Bins
- Viewing Your Calendar and Appointment Bins
- Synchronizing an Appointment

Using the Quick Find Search

Use the Quick Find search to find your appointments, tasks, notes, employees, and groups.

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. See *Oracle Common Application Components Implementation Guide*, Appendix B, about concurrent programs.

Perform the following steps to execute a search.

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 perform a search.
3. Click any item to display the details.

Using the Advanced Search

In addition to the Quick Find search, HTML Calendar also allows you to use advanced search functionality to search for appointments based on the following search criteria:

- Name
- Appointments between two dates
- Type
- Priority
- Description
- Show All Invitations

To access the advanced search window, you must first select "Appointment" from the Quick Find drop-down list. Click the Advanced Search hyperlink to access the Appointment Advanced Search window.

Enter at least one search criterion and perform a search to see the appointments that match the search criteria populated in the Appointments window. When clicking the appointment link listed in the search results, you can either view the appointment details or respond to the appointment invitation if searching by "Show All Invitations".

For example, you can search for all your appointment invitations specifically for next week. After entering appropriate date range and selecting the "Show All Invitations" check box, you will see all appointments that you are invited for next week listed in the Appointments window. You can respond to each appointment invitation by clicking the appointment name hyperlink or the name with prefix "INVITE" to access the Appointment Invitation window where you can accept or decline the invitation. Once you accept the invitation by clicking the Accept button for the appointment with prefix "INVITE", when performing a search next time, the same appointment will still be

retrieved, but listed without the prefix "INVITE". You can then decline the invitation if necessary.

Perform the following steps to perform an advanced search.

Prerequisites

None

Responsibility

CRM Application Foundation User

Navigation

Navigate to any Calendar window.

Steps

1. Select Appointment from the Quick Find drop-down list to see the Advanced Search hyperlink in the screen.
2. Click the Advanced Search hyperlink to access the Appointment Advanced Search window.
3. Enter at least one search criteria and click **Search**.
4. Click appointment link if searching by "Show All Invitations" to respond to the invitation.
5. Click any appointment link to view the appointment in the Appointment Details window.

Viewing and Updating Appointment Details

Use the Appointment Details window to view details for any of your existing appointments. You can access the appointments menu 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 views.

Steps

1. View and edit information in the window.
2. Save your updates.

Guidelines

The following table describes links, which appear in the side navigation bar of the Appointment Details window.

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.
Notes	Click this link to add a note to an appointment.

See Also

- Creating an Appointment, page 34- 4
- Creating Repeating Task or Appointment, page 34-10
- Adding an Attachment, page 34-12
- Defining Attendees for an Appointment, page 34- 8
- Relating Appointments to Source Objects, page 34-13

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.

HTML Calendar defaults appointment Type to "General" in the Create Appointment window regardless of the profile value set in the "Task Manager: Default Task Type" profile option. You can change the default type from the Type drop-down list. The available types shown in the list are only the types that are mapped to the source object "Appointments". This is because HTML Calendar uses the method of mapping desired task types to the object "Appointments" to control the appointment type's list of values. However, if no task types are mapped to the object "Appointments", then all of the types will be displayed in the drop-down list. For those unwanted task types, your system administrators or implementors can set end dates to exclude them from the list.

How to map task types, see: *Defining Task Types, 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.

- 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.
 1. Enter at least two characters in the search field and perform a search.
 2. Select the option button of the time zone you want to define.

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: You can update the default type "General" to other type if needed.
 - (Task) Category
 - Priority (Status)
5. Select when you want to be reminded of an appointment:
 - 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 e-mail notification since you cannot receive both e-mail 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.
 1. Use the Reference Type drop-down list to select an object to reference an appointment being created such as a person, organization, or opportunity.
 2. 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.

See Also

- Viewing and Updating Appointment Details, page 34- 3
- Creating Repeating Task or Appointment, page 34-10
- Adding an Attachment, page 34-12
- Defining Attendees for an Appointment, page 34- 8
- Relating Appointments to Source Objects, page 34-13
- Creating a Note, page 13- 1

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.
2. If you are trying to delete a repeating appointment, the Delete Appointment window opens with the following three options:
 - Delete Only this Appointment
 - Delete All Appointments
 - Delete All Future Appointments
3. Select the option you want to delete the appointment.

See Also

Creating an Appointment, page 34- 4

Defining Attendees for an Appointment

Use the Attendees window to send an appointment invitation to another resources. When searching for resources, you can search either by resource name, such as Jeff Walsh, or by user name, such as jwalsh. After a search, both resource name and user name of the selected resource are displayed for your selection.

- 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.

Perform the following steps to invite an employee resource to an appointment.

Prerequisites

- An appointment must already exist.
- In order for a resource to receive an e-mail 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.
2. Enter either the resource name or user name of the employee you want to invite to the appointment or perform a search using the lookup tool.
 1. Enter at least one character in the search field and execute a search. Resources with both resource names and user names appear in the window.
 2. Select the option button of the resource you want to attend the appointment.
3. Click **Add**. The resource name is moved to the multi-select text box.
4. Select the resource and click **Availability** to view the individual's availability for the scheduled appointment time in a graphical format.
5. Click **Send Invite** to add the resource to the invitees list with invitation status such as "Invited", "Accepted", or "Rejected".

6. To create a note for the appointment, click the **Notes** link on the side navigation bar and click **Create Note**.

See Also

- Viewing and Updating Appointment Details, page 34- 3
- Creating an Appointment, page 34- 4
- Creating Repeating Task or Appointment, page 34-10
- Responding to an Invitation, page 34- 9
- Adding an Attachment, page 34-12
- Relating Appointments to Source Objects, page 34-13
- Creating a Note, page 13- 1

Responding to an Invitation

When you receive an invitation to an appointment, it displays on your calendar with the word INVITE.

When you respond to the invitation by either accepting or rejecting it, HTML Calendar sends a workflow notification to the appointment owner. The notification that is similar to the invitation contains key information of the appointment, such as start date and time, duration, priority, type, description, and repeating rule details if for a repeating appointment. The notification is for information only, and it does not require any response.

For example, a workflow notification for an Accepted invitation to the owner can be like:

- *Rabbit, Miss Alice Mary has accepted invitation to the appointment Team Meeting. This appointment repeats every 1 week(s) until 03-SEP-2004.*

Meeting Details:

Start Date and Time: 05-JUN-2004 14:00

Duration: 1 hour

Timezone: Asia/Calcutta

Priority: High

Type: General

Description: Team discussion

Once you accept the invitation, the status changes from "Invitee" to "Attendee" and you can attach notes to it. For the repeating appointment or task, you 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 workflow notification is sent to the owner of the appointment.
2. Click **Reject** to decline the invitation. The link disappears completely and a workflow notification is sent to the owner of the appointment.
3. To view any notes attached to the appointment, click the **Notes** link in the side navigation bar.

See Also

- Creating an Appointment, page 34- 4
- Defining Attendees for an Appointment, page 34- 8

Creating a Repeating Task or Appointment

Use the Repeating window to create a series of appointments for a regularly scheduled appointment.

See the Task Manager Documentation about Creating a Repeating Task or Appointment.

See Also

- Viewing and Updating Appointment Details, page 34- 3
- Creating an Appointment, page 34- 4
- Adding an Attachment, page 34-12
- Defining Attendees for an Appointment, page 34- 8
- Relating Appointments to Source Objects, page 34-13

Viewing and Updating Existing Attachments

You can view or update existing attachments created for an appointment, a task, or a note through the HTML Calendar, Tasks, Notes or other integrated applications.

Viewing Attachments

Use the Attachments window to view existing attachments for a selected appointment, task, or note. You can find attachment summary information including creation date, description, file size, data type, created by, and the actual attachment link.

By clicking the source or name hyperlink, you can view the details of the selected source document. To view the actual attachment, click the attachment link to directly access the attachment details.

Updating Attachments

You can update or delete existing attachments for an appointment, a task, or a note. By clicking the Description hyperlink in the Attachments window, you can update the attachment's description and change appointment type including text, file, and URL information.

When updating the appointment type in the file format, you can see the previously selected file displayed as a label below the Browse button, not in the file field. To replace the file, you must use the Browse button to select a new file and then click the Update button to save the changes. If clicking the Update button without first selecting a new file, you will see an error message populated. After updates, you are returned to the Attachments window with the new attachments.

To delete an attachment, select the Remove check box next to the attachment that you want to delete in the Attachments window.

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

Perform the following steps to view the attachments window.

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**.
2. Click any attachment link to view it in the window.
3. Click Description link to update an existing attachment in the Update Attachment window.
4. Update the selected attachment's description, or attachment type information if necessary.
5. Click **Update** to save your changes.

See Also

Adding an Attachment, page 34-12

Adding an Attachment

You can create and add an attachment to an appointment, a note, or a task. 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.
2. Click **Add Attachment** to add attachments to the appointment.
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.
 - **URL:** Enter the URL address.
5. Click **Create** to add the attachment to the Appointment.

See Also

- Viewing and Updating Appointment Details, page 34- 3
- Creating an Appointment, page 34- 4
- Creating Repeating Task or Appointment, page 34-10

- Defining Attendees for an Appointment, page 34- 8
- Relating Appointments to Source Objects, page 34-13

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 perform a search using the lookup tool.
3. Select the business object you want to reference the business object.
4. Click **Update** to add the information to the table.

See Also

- Viewing and Updating Appointment Details, page 34- 3
- Creating an Appointment, page 34- 4
- Creating Repeating Task or Appointment, page 34-10
- Adding an Attachment, page 34-12
- Defining Attendees for an Appointment, page 34- 8

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, page 34-14
- Viewing the Task Bin, page 25-16
- Editing Your Task Bin, page 25-17

Note: For more information regarding the implementation and customization of bins, please see the *Oracle Applications CRM System Administrator's Guide*.

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.
 - 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.

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, page 37- 1](#)
- [Required Setups and Configuration, page 37- 2](#)
- [Terms and Definitions, page 37- 5](#)
- [Synchronization of Appointments, page 37- 7](#)
- [Palm and Outlook Synchronization FAQs, page 37-20](#)
- [Troubleshooting Tips, page 37-24](#)
- [Field Mappings, page 37-25](#)

See Also

- [Synchronization of Business Contacts, page 37-14](#)
- [Synchronization of Tasks, page 37-10](#)

Customizing Your Calendar Preferences

This chapter covers the following topics:

- Changing Your Personal Preferences
- Defining Privileges for Your Calendar
- Working with Group Calendars
- Requesting a New Group or Public Calendar
- Subscribing to a Group Calendar
- Switching to Another Calendar
- Adding and Removing Task Categories
- Defining Your Time Zone
- Modifying General Preferences and Your Password

Changing Your Personal Preferences

Use Calendar preferences to control the way that you view your calendar. You can set personal calendar preferences in the following regions:

General Setup Header

This header region includes setting default values for the following fields:

- **Issue Notification.** Select whether or not you want workflow notifications sent to invitees when an invitation is sent, as well as workflow notifications sent to an owner when invitees responding to an invitation. The e-mail notifications can also be sent only if e-mail server is set up correctly. The default is set to Yes.
If No is selected which overwrites sending an e-mail to an invitee or an owner.
- **Display Items.** Select whether or not you want to show calendar items, such as marketing objects, in your personal calendar views.
- **Clock (12/24 Hour).** Select if you want your clock to display in intervals of 12 or 24 hours.
- **Display Task Customer and Source.** Select whether or not you want to display task customer and source in calendar views. The default is No.

Color/Prefix Setup for Items Region

To differentiate tasks, and calendar items from appointments in your calendar views, HTML Calendar allows you to choose different color and prefix for each of them so that you can easily identify them in your 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".

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.

To be able to view calendar events in your personal calendars, in addition to having "Display Items" set to "Yes" and identifying desired color and prefix text, 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.

Weekly Setup Region

Use this region to set up the following display intervals for a week:

- Select in what order you want a week in your calendar to begin and end. For example, Sunday through Saturday or Monday through Friday.
- Select the way you want your appointment time increments to display. For example, 15 minute or 30 minute increments.
- Select the start and end time for each day of the week that you want in your calendar. For example, from 08:00 a.m. and ends at 05:00 p.m.

Perform the following steps to modify your personal preferences.

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. Select your personal preferences:
 - Select whether or not you want workflow notifications sent to the attendees.
 - Select whether or not you want to show the calendar items in your calendar.
 - Select if you want your clock to display in intervals of 12 or 24 hours.

- Select whether or not you want to display task customer and source in calendar views.
- 2. Select your desired color and prefix information for appointments, tasks, and other calendar items that you wish to display in your personal calendar.
- 3. Select calendar display preferences:
 - Select what order you want the weeks on your calendar to begin and end.
 - Select the way you want your appointment time increments to display.
 - Select the start and end time you want to display in your calendar for each day of the week.
- 4. Save your changes.

See Also

- Subscribing to a Group Calendar, page 35- 6
- Requesting a New Group Calendar, page 35- 5
- Switching to Another Calendar, page 35- 7
- Adding and Removing Task Categories, page 35- 8
- Defining Privileges for Your Calendar, page 35- 3
- Defining Your Time Zone, page 35- 9

Defining Privileges for Your Calendar

Use Calendar privileges to grant another user "view only" or "full access" to your personal calendar. When searching for users, you can search either by resource name, such as Jeff Walsh, or by user name, such as "jwalsh". After a search, both resource name and user name of the selected resource are displayed for your selection.

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 Task Security, *Oracle Common Application Component Implementation Guide*.

- 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.

Perform the following steps to set calendar privileges.

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.
2. Enter the user name or resource name in the text field next to the access you wish to grant (view only or full access) or use the Lookup window to search for a user.
 1. Enter at least one character for the search criteria and click **Go**. Resources with both resource names and user names appear in the window.
 2. Select the option button of the resource you want to grant privileges to and click **Select**.
3. Click **Add** to add the user name to the multi-line text field and save your updates.

See Also

- Subscribing to a Group Calendar, page 35- 6
- Requesting a New Group Calendar, page 35- 5
- Switching to Another Calendar, page 35- 7
- Changing Your Personal Preferences, page 35- 1
- Adding and Removing Task Categories, page 35- 8
- Defining Your Time Zone, page 35- 9

Working with Group Calendars

See the following sections to subscribe to or request a new group calendar.

- Requesting a New Group Calendar, page 35- 5
- Subscribing to a Group Calendar, page 35- 6

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, page 36- 2

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 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.

If requesting a public calendar, you must select the **Public** check box to identify this group calendar is used as public calendar. After being approved by the Calendar Administrator, you will become the owner of the public calendar who will be responsible for future appointment creation and updates for that public calendar.

To create appointments for a public calendar, the public calendar owner needs to use the switch calendar functionality. All appointments created for a public calendar must be classified as "public" appointments. They cannot be "private". As a result, any calendar users can view public calendars without subscription request.

- 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*.

Perform the following steps to request creation of a new group calendar.

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.
2. Click **Request New Group**.
3. Enter a name for the group.
4. Optionally 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, page 35- 6
- Switching to Another Calendar, page 35- 7
- Changing Your Personal Preferences, page 35- 1
- Adding and Removing Task Categories, page 35- 8
- Defining Privileges for Your Calendar, page 35- 3
- Defining Your Time Zone, page 35- 9

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 to see all group calendar you are currently subscribed to.
2. Click **Subscribe to Group**.
3. Enter the name of the group calendar you want to subscribe to or perform a search.
 1. Enter at least one character in the search field and execute the search.
 2. Select the option button of the calendar you want to add. 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**.
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, page 35- 5
- Switching to Another Calendar, page 35- 7
- Updating Group Calendar Subscription Information, page 36- 2
- Changing Your Personal Preferences, page 35- 1
- Adding and Removing Task Categories, page 35- 8
- Defining Privileges for Your Calendar, page 35- 3
- Defining Your Time Zone, page 35- 9

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.
2. Select the calendar that you wish to switch to from the drop-down list. The list of values contain only those calendars that you own or have access granted to. The default calendar is your personal calendar.
3. Click **Switch Calendar** to view the new calendar in the daily view.

See Also

- Subscribing to a Group Calendar, page 35- 6
- Requesting a New Group Calendar, page 35- 5
- Changing Your Personal Preferences, page 35- 1
- Adding and Removing Task Categories, page 35- 8
- Defining Privileges for Your Calendar, page 35- 3
- Defining Your Time Zone, page 35- 9

Adding and Removing Task Categories

Use Calendar to create personalized task categories to classify your appointments or tasks.

- 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.
2. Enter a name for the category into a blank field under the category column.
3. Save your changes.

See Also

- Subscribing to a Group Calendar, page 35- 6
- Requesting a New Group Calendar, page 35- 5
- Switching to Another Calendar, page 35- 7
- Changing Your Personal Preferences, page 35- 1
- Defining Privileges for Your Calendar, page 35- 3
- Defining Your Time Zone, page 35- 9

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.

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*.

Perform the following steps to change your time zone information for Calendar and all integrated Oracle Products.

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.
2. Perform a search to select the time zone you want to specify as your default.

3. Enter at least two characters in the search field and execute the search.
4. Select the option button of the time zone you want to define.
5. Save your changes.

See Also

- [Subscribing to a Group Calendar, page 35- 6](#)
- [Requesting a New Group Calendar, page 35- 5](#)
- [Switching to Another Calendar, page 35- 7](#)
- [Changing Your Personal Preferences, page 35- 1](#)
- [Defining Privileges for Your Calendar, page 35- 3](#)
- [Adding and Removing Task Categories, page 35- 8](#)

Modifying General Preferences and Your Password

For more information regarding the Preferences and Personal Profile links accessed through the profile icon, see the *Oracle Applications CRM System Administrator's Guide*.

Administering Group Calendars

This chapter covers the following topics:

- Viewing and Approving New Group Calendar Requests
- Viewing and Approving New Group Calendar Subscription Requests
- Viewing Group Calendar Subscription Information
- Updating Group Calendar Subscription Information

Viewing and Approving New Group Calendar Requests

The Calendar Administrator can approve or reject a new group calendar request. Whether the request is granted or rejected, the requestor receives a notification. If the request is approved, the requestor automatically becomes the Group Calendar Administrator, and is then responsible for approving future subscription requests for that group calendar.

Note: If you are running Calendar integrated with Oracle Sales Online, you can view HTML notifications from your worklist.

Responding to New Group Calendar Requests

You must configure your Personal Home Page (PHP) and create a worklist to receive notifications and be a Calendar Administrator to approve new group calendar requests. See: *Creating a Calendar Administrator, Oracle Common Application Components Implementation Guide*.

1. Navigate to your homepage worklist in Forms.
2. Click on any request link.
3. In the lower portion of the window, select **No** in the response drop-down list to deny the request, or **Yes** to accept it.
4. Click an appropriate button to approve or deny the request.

Viewing and Approving New Group Calendar Subscription Requests

When you receive an approval for a new group calendar, you become the owner and the Group Calendar Administrator, and are responsible for responding to all future subscription requests.

Responding to New Group Calendar Subscription Requests

You must configure your Personal Home Page (PHP) and create a worklist to receive notifications and be a Group Calendar Administrator with the CRM Application Foundation User responsibility or the JTF HTML Calendar User responsibility.

1. Navigate to your homepage worklist in Forms.
2. Click on any request link.
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 **Reject** to deny it.
4. Click an appropriate button to approve or reject the request.

Viewing Group Calendar Subscription Information

To view group calendar subscription information, the Calendar Administrator can see an additional drop-down menu in the Calendar Group Subscription window with the following choices:

- Show Subscribed (Default)
- Show All

The "Show Subscribed" lists the group calendars that the 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 calendars' names and descriptions will be shown in the Calendar Group Subscription window.

Viewing Group Calendar Subscription Information

You must be the Calendar Administrator to view group calendar subscription information. See: *Creating a Calendar Administrator, Oracle Common Application Components Implementation Guide*.

1. Use the CRM Application Foundation User or JTF HTML Calendar User responsibility to navigate to the Calendar Personal Preferences window by clicking the **Profile** icon > clicking **Group Calendar** in the side navigation bar.
2. In the Calendar Group Subscription window, review the group calendar information that the Calendar Administrator has subscribed to.
3. (Optionally) select **Show All** from the drop-down list to review all group calendars.

Updating Group Calendar Subscription Information

After the Calendar Administrator approves a new group calendar request or the Group Calendar Administrator approves a subscription request, any users can update their group calendar subscriptions shown in the Calendar Group Subscription window.

However, the level of calendar updates is based on user types. An average user can perform basic subscription updates. A user who is a Calendar Administrator or a Group Calendar Administrator can also update the list of Group Calendar Administrators (owners) shown for the selected group calendar.

Basic Group Calendar Subscription Updates

After opening the subscribed group calendar, you can modify the subscription information by changing the color and prefix event title information for the selected group calendar. The Color and Prefix Event Title fields are used to differentiate which activities displayed in your personal calendar belong to the subscribed group calendar. Click **Unsubscribe** to revoke the selected group calendar subscription.

There is also a table listing all the Group Calendar Administrators for the selected group calendar.

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 the Remove check box shown in the table next to the Name field. A user with the 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 the update was 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 has at least one Group Calendar Administrator remaining in the table. Otherwise, an error message indicates that you must 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 indicates that 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 through workflow notifications will be sent to all of the Group Calendar Administrators. The access privilege of the subscriber to the group calendar is based on the level granted by the first approver. When one administrator approves the request, notifications sent to the rest of administrators will be removed automatically from their worklists.

For example, one of the administrators approves the request and grants the subscriber an access level, such as Read. The system will first check whether the subscriber has been added or removed from the list. If the subscriber is added to the list, then it will change the notification status to "Closed" for all notifications sent to the rest of administrators.

Tips: Although you can have more than one Group Calendar Administrator for a group calendar for backup purposes, it is suggested that you grant only one additional user the Administrator access.

While responding to group calendar subscription requests, the Group Calendar Administrator can grant Full Access to a user who needs to create or update the group calendar's appointments, or grant Administrator access to a user who acts as the Group Calendar Administrator. The administrator should grant Read Only access to all other subscribers.

Updating Group Calendar Subscription Information

To update administrators for a given group calendar, you must have the administrator role meaning either be a Calendar Administrator or a Group Calendar Administrator.

1. Use the CRM Application Foundation User or JTF HTML Calendar User responsibility to navigate to the Calendar Personal Preferences window by clicking the **Profile** icon >**Group Calendar** in the side navigation bar.
2. In the Calendar Group Subscription window, view a list of your subscribed group calendars.
3. Click one of the group calendar names to update group calendar subscription information such as color and prefix event title.
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:
 1. Select the Remove check box next to the administrator whom you want to remove.
 2. Use the Name LOV to search by either a user name or a resource name and find the administrator you want to add to the calendar.

Palm and Outlook Synchronization

This chapter covers the following topics:

- Overview of the Synchronization Process
- Setup and Configuration
- Terms and Definitions
- Appointment Synchronization
- Task Synchronization
- Business Contact Synchronization
- Palm and Outlook Synchronization FAQs
- Troubleshooting Tips
- Field Mappings

Overview of the Synchronization Process

Through our partner, Pumatech Inc., Oracle provides a two-way synchronization process through its "Intellisync® for Oracle" allowing you to upload and download critical business or personal information between Oracle E-Business Suite and the offline device connected to your personal computer. Upon synchronization, information that you enter once, in either Oracle E-Business Suite or your offline device, will be available in both places.

Note: An offline device refers to where data will be seen and maintained outside the Oracle E-Business Suite through the use of Intellisync software. In this release, "offline device" refers to either Palm OS or Microsoft Outlook.

The information available for synchronization includes appointments, tasks, and Trading Community Architecture (TCA) business contacts that you have access to based on Oracle Sales Online security.

Once the synchronization process is triggered, the E-Business Suite retrieves the records to be synchronized based on business rules for each area (business contacts, appointments, and tasks). The records are passed through the Intellisync engines and software on your desktop. Finally, Intellisync passes the data to the connector you selected (Microsoft Outlook or Palm OS), creating and updating data in those applications accordingly. The process then functions in reverse, gathering any

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.

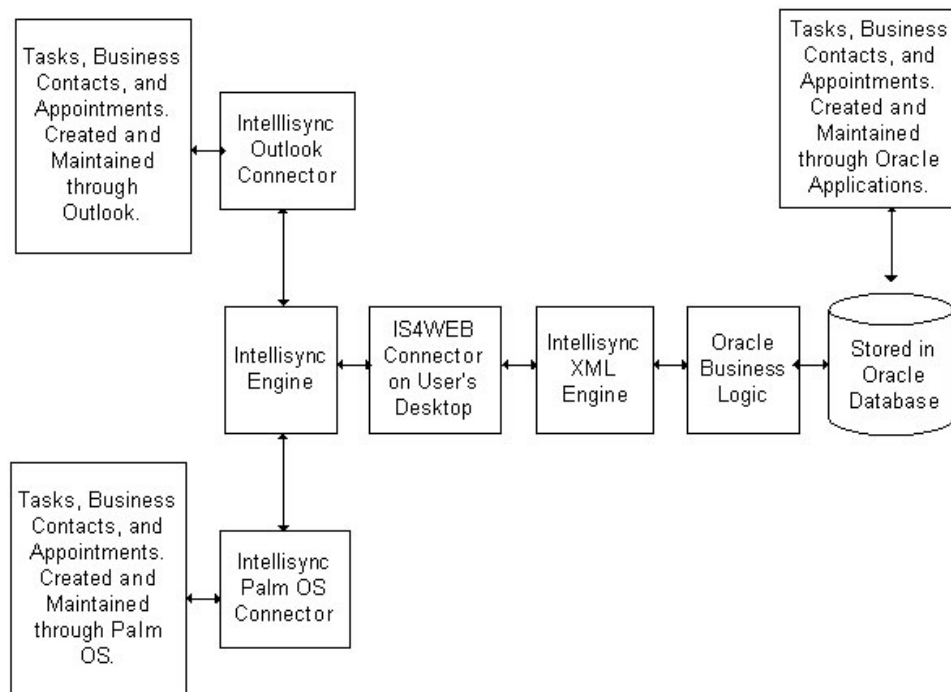
During synchronization, the Intellisync software provides you with detailed information about how many records can be synchronized since the last synchronization. The user can view the details of those records or cancel the synchronization process for a given record.

Note: Oracle does not certify synchronization to the Palm Pilot Desktop. Synchronization between the Palm Pilot Organizer and the Palm Pilot Desktop must be handled by 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:

Synchronization Process Functional Flow



Setup and Configuration

Before starting the synchronization process, download and install the Intellisync Client software and configuration file from the Pumatech Inc. web site (<http://www.pumatech.com>) and put them in the same directory.

Note: Do not modify the Configuration file (DCSSettings.cfg). The file can only be modified by the 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 log on to the configuration settings page and further specify configuration details to connect to Oracle server.

Required Setups

You must complete the following steps before starting synchronization:

1. Specify your E-Business Suite login information in the configuration settings window:

1. Enter your company name.
2. Enter your username in the User ID field.
3. Enter your password in the Password field.

Note: If the Single Sign-On feature is used, your implementor or system administrator should have set the profile option "Applications SSO Login Type" to "Both" so that the synchronization required username and password are stored both at the local application level, such as Oracle E-Business Suite, and the external Oracle Internet Directory or the Single Sign-On Server. If it is set to "SSO", then the login information is stored externally at the SSO Server only and not maintained at the application level. Therefore, the sync feature will not work. If it is set to "Local", then the sync required login information is stored at the local application level only which means that login is only allowed through the Oracle E-Business Suite local login.

4. 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.
 - If you are using a secured server connection, click on the proxy server settings button and then the Intellisync help button for setup 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:
 1. Click **Configure Applications** to open the configuration window.
 2. Select the check box next to the item name (appointments, tasks, and contacts) that you want to synchronize. Note that only selected items will be synchronized.

It is important to note that all of the selected items must use the same conduit for synchronization.
 3. Click **Choose** to select the conduit (either Palm Pilot Organizer or Microsoft Outlook) for the selected items.
 3. After identifying the conduit for the selected items, you can choose the following radio buttons:

- **Import:** The selected data in the offline device (such as Tasks in the Palm device) can be imported into Oracle E-Business Suite.
 - **Export:** The selected item (such as Tasks) can be exported to the designated offline device (such as Palm) from Oracle E-Business Suite.
 - **Synchronize:** The selected item between Oracle E-Business Suite and the chosen offline device can be synchronized.
4. Click **OK** and **Save** to return to the main banner window.

If the Microsoft Outlook conduit is selected, then click **Synch** in the main banner window to trigger the synchronization process.

If the Palm Pilot Organizer conduit is selected, then push the **Synchronization** button on the Palm Pilot cradle.

(Optional) Advanced Setup

You can change the default settings provided by the Intellisync software to further customize the synchronization process for your selected items.

Highlight the item that you want to customize, and then click **Advanced** in the configuration window to access advanced configuration options including data options, filters, conflict resolution rules, and confirmation messages.

Synchronization Data Options

You can determine what data will be synchronized based on the following 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
- **Business Contacts:** Intellisync does not provide options for business contacts.

Synchronization Filters

With the Intellisync software, you can create custom filters for additional constraints on the synchronized data. 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.

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 (overwrites data from offline device)
- Offline device wins (overwrites data from Oracle)

Synchronization Confirmation Messages

The Intellisync software allows you to request a confirmation dialog when records are synchronized. 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

By default, both items are selected.

Terms and Definitions

The following table lists terms and definitions associated with synchronization:

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 allows users to sync from the Oracle E-Business Suite to their Palm OS or Microsoft Outlook.
Party	An entity that can enter into a business relationship and is one of the four types: Person, Organization, Group, and Relationship. Any entity that can be assigned to a CUSTOMER ACCOUNT. Parties can be individual persons or organizations.
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.

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 object of Appointment in the Calendar module.
Business Contact	A business contact is defined as 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 is where data will be seen/maintained outside the E-Business Suite through the Intellisync software. For this release, offline device refers to either Palm or Microsoft Outlook.
OSO	OSO stands for Oracle Sales Online and is a product that has screens to maintain organizations, persons, and any (business) contact relationships for those organizations or persons.
TCA	TCA stands for Oracle Trading Community Architecture whcih holds the physical schema used to store Customers and other trading partners in the E-Business suite.
Download	Download refers to the direction of the synchronization process. For download the data is being copied from the E-Business Suite and synchronized to the offline device.
Upload	Upload refers to the direction of the synchronization process. For upload the data is being copied from the offline device and synchronized to the E-Business Suite.
Repeating Series	A repeating series is a group of appointments bound by a rule that 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	An exclusion list is a list of dates for a given repeating series when the appointment will NOT occur. For example, a meeting can happen on the 4th of every month. If the appointment does not occur on the 4th July and 4th of December, then these dates together form the exclusion list.

Appointment Synchronization

Oracle supports two-way synchronization for the appointments that appear on your HTML Calendar. This includes appointment invitations, repeating appointments, and appointments shown from group calendar subscriptions.

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 your HTML Calendar Daily view will be synchronized to the offline devices as tasks. Therefore, you will not be able to view these items on your offline device in the appointment/calendar area. However, you can view those tasks in the offline device in the task/to do areas. See Task Synchronization, page 37-10 for details.
- The appointments of others to which you have access will not be synchronized to the offline device.

For example, a sales representative has access to a teammate's calendar. When the representative synchronizes her appointments, she will not receive any of her teammate's appointments on her offline device.

Synchronization Scenarios

You can synchronize appointments between Oracle E-Business Suite 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. Upon returning to the office, the representative synchronizes data with the E-Business Suite. The appointment created on the Palm now exists on the sales representative's HTML Calendar.

Another example is 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 the E-Business Suite 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 appointment repeating functionality as part of the two-way synchronization.

- Accepting or rejecting appointment invitations from either the Palm or Microsoft Outlook.

Synchronization Methods

Appointment synchronization between the E-Business Suite and an offline device can be achieved by downloading or uploading them to or from the offline device.

Downloading Appointments to the Offline Device

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.

Note: Tasks that appear on your HTML Calendar will not be selected for appointment synchronization. These tasks will be included in task synchronization.

Appointment Invitation: You can see "INVITE:" precede with the appointment name in the offline device. You can accept or reject the invitation in the offline device prior to the next synchronization.

To accept the invitation in the offline device, remove the prefix "INVITE:" from the appointment name. To reject the invitation, simply delete the appointment from the offline device.

Appointment Category: For appointment categories that exist in both the offline device and the HTML Calendar, the category should be downloaded to the offline device. If you create an appointment in the HTML Calendar with a category that does not exist in the offline device, the category will be created in the offline device at synchronization.

Time Zone: While creating appointments in the HTML Calendar, you can specify time zone information for an 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 E-Business Suite can interpret the time zone information and display the appointment in your calendar daily view at 11:00 am PST.

However, in the offline device, you do not specify a time zone, but rather set the local time. Upon synchronization of this appointment, you 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 be downloaded to the offline device.

See Also

- Changing Your Personal Preferences, page 35- 1
- Receiving an Invitation, page 34- 9
- Adding and Removing Task Categories, page 35- 8
- Defining Your Time Zone, page 35- 9

Uploading Appointments from the Offline Device

You can upload appointments created in the offline device to the HTML Calendar.

Appointment Name: In Microsoft Outlook, you 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 E-Business Suite. Appointments can be created with an appointment name like "_".

The appointment name field in Microsoft Outlook is 255 characters. However, the appointment name field in the HTML Calendar is 80 characters. If you have entered an appointment name in the offline device that is greater than 80 characters, 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 you reject or accept any appointments in the offline device, after synchronization, the accepted appointments in the offline device will show Accepted attendee status in the HTML Calendar. Rejected appointments will be removed from the HTML Calendar.

Group Calendar Appointment: Group calendar appointments can be downloaded to the offline device. However, updates made to a group calendar appointment in the offline device will not be synchronized to the HTML Calendar, regardless of whether you are the group calendar owner.

Appointment Category: For categories that exist in both the offline device and the HTML Calendar, the category will be uploaded to the HTML Calendar upon synchronization. If you create an appointment in the offline device with a category that does not exist in the HTML Calendar, the category specified on the offline device will be automatically created in your personal preferences upon synchronization. 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, only the first category listed in 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 translated to the server time zone stored in the Oracle database. The time information displayed in the HTML Calendar or Task Manager is 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 be shown at 2:00 pm PST in the HTML Calendar if American_Los/Angeles is the user time zone set in the user preferences page, but as 5:00pm if the user time zone is EST.

Appointment Reminder: Appointment reminders can be uploaded to the HTML Calendar if the reminder increment is supported both in Oracle E-Business Suite and the offline device. If a reminder increments (such as "remind me 10 minutes before") is supported in the offline device, but not in the E-Business Suite, then this reminder can not be synchronized to the E-Business Suite. 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 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 a 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, you can see the un-timed appointments in the top section of the HTML Calendar daily view.

See Also

- Creating an Appointment, page 34- 4
- Defining Attendees for an Appointment, page 34- 8
- Receiving an Invitation, page 34- 9
- Creating Repeating Task or Appointment, page 34-10
- Changing Your Personal Preferences, page 35- 1
- Adding and Removing Task Categories, page 35- 8
- Defining Your Time Zone, page 35- 9
- Viewing and Approving Group Calendar Requests, page 36- 1

Task Synchronization

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

Business Rules

In general, the business rule for task synchronization is that the tasks that appear on your HTML Task Manager summary page can be synchronized to the offline device as tasks. However, there are two exceptions to this rule.

Exceptions

- Other users' tasks that you have been granted access to will not be synchronized to the offline device even if you have full access privileges.
- Repeating tasks cannot be synchronized to the offline device.

Synchronization Scenarios

You 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 some information via e-mail tomorrow. Upon returning to the office, the representative synchronizes her data with Oracle E-Business Suite. 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.
- 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 E-Business Suite 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.

Synchronization Methods

Task synchronization between Oracle E-Business Suite and an offline device can be achieved by downloading or uploading tasks to or from the offline device.

Downloading Tasks to the Offline Device

Whether tasks can be downloaded to the offline device is based on your login information. As mentioned earlier, all of the open tasks that are owned by or assigned to you can be downloaded to the offline devices. However, repeating tasks and tasks that you have access to because of privileges granted will not be synchronized to the offline device.

Task Status: For synchronization purposes, the task status used for synchronization will be the task header status. As the offline device does not have the concept of header status and assignee status for tasks, Oracle always uses the task header status for synchronization.

If there are status transition rules in place for the responsibility of the logged-in user, then Oracle will not allow changing the task status from the device. This is to ensure that business rules will not be overwritten during synchronization. See: *Defining Task Statuses and Status Transition Rules, Oracle Common Application Components Implementation Guide*.

Oracle will not synchronize new tasks that are created in the Oracle E-Business Suite with the status of "Completed" to the offline device. If a previously synchronized task is updated in the suite 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.

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 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.

User Defined Task Status Flag Mapping

Oracle Common Application Components Task Status Flag	Offline Device Status Name
Assigned	Not Started
Working	In Progress
Schedulable	Not Started
Accepted	In Progress
On Hold	Deferred
Approved	In Progress
Completed	Completed
Closed	Completed

Category: If a task category exists in both the offline device and the HTML Calendar, the category can be uploaded to the HTML Calendar upon synchronization. If you create a task in the offline device with a category that does not exist in the suite, the category specified on the offline device will be automatically created upon synchronization in your 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 alphabetical order is synchronized. See: Adding and Removing Task Categories, page 35- 8 .

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 value 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 from the task start date. However, this profile only affects the task creation screens, not the update screen. If this profile is set, then any change you make to the task start date in the task creation screen is automatically populated to end date field.

Whether the date 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 a start date, but without an end date (an open-ended task), will not be downloaded to the offline device. Tasks can be downloaded if they have both start and end dates specified, or if they are without both dates. If a previously synchronized task becomes open-ended in the HTML Tasks, 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: Defining Task Priorities, *Oracle Common Application Components Implementation Guide*.

See Also

- Defining Task Statuses and Status Transition Rules, *Oracle Common Application Components Implementation Guide*
- Defining Task Priorities, *Oracle Common Application Components Implementation Guide*
- Creating a Task, page 25- 1
- Associating a Task with a Customer, page 25- 8
- Defining Dates for a Task, page 25- 7
- Assigning a Resource to a Task, page 25-11
- Creating a Repeating Task or Appointment, page 25-14
- Changing Your Personal Preferences, page 35- 1
- Adding and Removing Task Categories, page 35- 8
- Defining Your Time Zone, page 35- 9

Uploading Tasks from the Offline Device

Tasks created in the offline device can be uploaded to Oracle E-Business Suite.

After uploads, the logged-in user becomes the owner of these tasks, but there are no assignees identified.

Task Name: The task name field in Microsoft Outlook is 255 characters. However, the task name field in the HTML Task Manager is 80 characters. If you enter a task name in

the offline device that is greater than 80 characters, then the task name is truncated to the first 80 characters during synchronization.

Task Status: The task status created in the offline device is 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: You do not specify a time zone, but set your local time in the offline device. Upon synchronization, Oracle interprets the date and time of the offline device to be the time zone listed in your preferences.

Start and End Dates: After synchronization, the due date specified in the offline device becomes the end date in Task Manager. The start date is based upon the value selected in the device. Whether this date is considered as a planned, scheduled, or actual date in the "User for Calendar" field is based on the value in the profile option *Task Manager: JTF Tasks Default Date Selected*.

It is important to note that if either the start or end date is not specified, the task will not be displayed in the personal calendar.

When uploading tasks from Palm, the start date is set to the date that the task was created in Palm.

Category: The task category selected in the offline device will be uploaded to the Oracle E-Business Suite. If the category exists in the offline device, but not in the suite, then the category is created automatically in the suite after synchronization.

It is important to note that if you upload the tasks created for the first time that have no category, then these tasks can still be created in Oracle E-Business Suite with the category of "Unfiled." However, upon the next synchronization, you 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 Statuses and Status Transition Rules, *Oracle Common Application Components Implementation Guide*
- Creating a Task, page 25- 1
- Associating a Task with a Customer, page 25- 8
- Defining Dates for a Task, page 25- 7
- Assigning a Resource to a Task, page 25-11
- Creating a Repeating Task or Appointment, page 25-14
- Changing Your Personal Preferences, page 35- 1
- Adding and Removing Task Categories, page 35- 8
- Defining Your Time Zone, page 35- 9

Business Contact Synchronization

Oracle supports 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 E-Business Suite to offline devices.

What Is a Business Contact?

Business contacts are based on the TCA model. The TCA includes not just customers, but also suppliers, internal organizations and employees. It holds the physical schema used to store information about customers and other trading partners in the Oracle E-Business 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 TCA model, the single data entity is linked to 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 of 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 four types: Person, Organization, Group, and Relationship.

Using this definition, Oracle synchronizes 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 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, page 25- 8
- Defining Task Contacts, page 27- 2
- Viewing Task Contact Information, page 27- 1

Synchronization Scenarios

Business contacts can be synchronized between Oracle E-Business Suite and an offline device for various reasons including the creation or modification of business contacts.

For example, a sales representative creates a new contact for a new customer on the Palm device while traveling. Upon returning to the office, the sales representative synchronizes the Palm device to the Oracle E-Business Suite 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 E-Business Suite.

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 changes his 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 E-Business Suite and synchronizes data with Microsoft Outlook.

Downloading Business Contacts to an Offline Device

Business contacts can be downloaded to an offline device based on synchronization rules.

Business Rules

The business contact synchronization rule is based on the definition of business contacts and the existing Oracle Sales Online security.

Definition of Business Contacts: In order to download business contacts to an offline device, Oracle Common Application Components use the following criteria to produce a list of business contacts for synchronization. Records that do not match the criteria will not be downloaded to offline devices:

- 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. See *Oracle Sales Online Implementation* for details.

The synchronization process will not synchronize inactive business contacts to the offline device if they have never been synchronized previously. However, it will remove a business contact on the offline device once it has been inactivated in the Oracle E-Business Suite.

Oracle Common Application Components will confirm that both the subject and object of the relationship are active before synchronization.

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. 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. For more information, see Field Mappings, page 37-25.

Oracle Sales Online Security: Data access in Oracle Sales Online 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.

For example, in order to view or synchronize contacts, you must be part of a sales team in an organization. Your system administrator must set the profile option *OS: Customer Access Privilege* to "Sales Team" (default value). This way, when you create a contact either through the E-Business Suite or synchronization, you will be added as a sales team member to the organization and that contact is visible in your "My Contacts" view. The synchronization process will then pick up the contact. If the profile option is set to "Full", then you will not be able to view or synchronize the contact.

See Also

- Associating a Task with a Customer, page 25- 8
- Defining Task Contacts, page 27- 2
- Viewing Task Contact Information, page 27- 1

Synchronization Behavior

When downloading business contacts to the offline device, they are 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. There is one exception to this rule: if you specify the general phone type as "display on Oracle Sales Online", then this phone number defaults to "main/business" in the offline device.

Since there are more phone numbers supported in Oracle E-Business Suite than the offline devices can support, Oracle Common Application Components will download the maximum number possible from the suite 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 suite 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 phone numbers synchronized to the offline device appear 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.

Uploading Business Contacts from an Offline Device

Only contacts with category of "Oracle Business" are eligible for upload. This is to avoid retrieving personal contacts from the offline device.

Note: Category "Oracle Business" does not exist in the Master Category List in Microsoft Outlook. To upload contacts from Microsoft Outlook to Oracle E-Business Suite, 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 through the creation of a new contact for a new or existing company, and changes made to business contacts from the offline device.

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 has 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. 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 the record.

In summary, to upload a new business contact to Oracle Common Application Components, a contact must have the following information in the offline device:

- A country name and the address line one, if one of the following profile options is set to Yes in Oracle Sales Online:
 - OS: Address Required for Organization
 - OS: Address Required for Person
- An organization name
- The business contact's name, either first or last name

Phone information will only be copied to the "relationship" record. Phone types that exist in the offline device, but do not exist in the Oracle Sales Online application, will not be synchronized. There is one exception to this rule: if you specify the phone type of business/work in the offline device, then this phone defaults to "display on Oracle Sales Online" in the Oracle Sales Online application.

Oracle uses the same phone format for both upload and download. If you create a new number or update an existing number using the same format, the number will be parsed accordingly. If the number is not updated using the format, then the entire number will not be parsed and will be placed into the main phone number field in Oracle E-Business Suite.

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. The "relationship" address must be kept in sync with the party type "person" address.

You can create an address for both "business" and "home" in Microsoft Outlook. For 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 device. For example, you create a business contact with the following address information entered in 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 reads: Address 1 = 123 Street, Address 2 = 67th Floor, Address 3 = Mail Stop 6701.

Instead of creating one new contact for a new company, you might create five new contacts in the offline device and only three of them have different address information specified for your company. During synchronization, if the profile options *OS: Address Required for Organization* and *OS: Address Required for Person* are set to "yes", then it is not possible to know which of these three different addresses will be used to create the organization's address in TCA. Therefore, only three contacts with address specified will be created for the person and relationship record. The two new contacts without addresses will not be created.

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. A TCA public API is used to avoid the creation of a duplicated record for the same company.

Updating Business Contact from Palm/Outlook

When updating business contacts in the offline device, be aware that whether your changes can be synchronized depends on the following conditions:

Changes to the Company: Oracle Common Application Components support updating the "relationship" information from the offline device to the E-Business Suite. Updates to the "organization" (company's name) are ignored from the offline device. If you change the company name and address information in the offline device, then only the address information can be updated to the suite. 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 E-Business Suite.

Changes to Business Contacts: If you delete a business contact in the offline device, this contact is not deleted in the Oracle E-Business Suite, but it becomes inactive. This results in placing the relationship record as inactive in the Oracle E-Business Suite. Conversely, if a previously synchronized contact is inactivated in the suite, this contact is 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, updates made to a business contact with category of "Oracle Business" can result in the following different outcomes due to the way Intellisync processes the data:

- If you change the contact in the offline device to any category other than "Oracle Business", the change is not uploaded to the server, where the category will still be "Oracle Business".
- If you change the contact to any category other than "Oracle Business" and then delete the contact in the offline device, the contact becomes inactivated in the Oracle E-Business Suite upon synchronization.

Changes to Business Contact's Address and Phone Information: Oracle Common Application Components support update of the address and phone information in the offline device. After uploads, the updated address information is copied to both the "relationship" and "person" records in TCA. This is because Oracle Common Application Components keep the party "person" address in sync with the party "relationship" address. This applies to update of both "home" and "business" addresses in Microsoft Outlook. Updated phone information in the device is updated only in the "relationship" record in the suite.

See Also

- Associating a Task with a Customer, page 25- 8
- Defining Task Contacts, page 27- 2
- Viewing Task Contact Information, page 27- 1

Palm and Outlook Synchronization FAQs

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. We recommend that you back up your data regularly in the future as well.

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. You can restrict the offline data to be synchronized by configuring the "Intellisync® for Oracle" software during the setup process.

How do I restrict the data that is being synchronized 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 lead to loss of shared data.

What is the start date for the data to be synchronized?

The first time you install Intellisync or synchronize data, the default date is January 1st, 1970. Thereafter, the start date will be reset to the date of the last synchronization.

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 the process is complete successfully:

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, then the default start date for tasks will be reset to June 30, 2002, 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 or decline the changes, 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 a 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 E-Business Suite 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

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 E-Business Suite, but the E-Business Suite 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 E-Business Suite.

Can I modify information about a customer site address from 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.

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 E-Business Suite.

What happens if my previously synchronized task is assigned to a different user in Oracle E-Business Suite?

If you reassign a previously synchronized task to a different user in Oracle E-Business Suite, then during synchronization, this task will be deleted from your offline device.

Can I synchronize repeating tasks between the offline device and Oracle E-Business Suite?

The repeating tasks cannot be downloaded from Oracle E-Business Suite to your offline device. However, if a repeating task is created in your offline device and uploaded to Oracle E-Business Suite, then only the first task can be created in the Oracle E-Business Suite.

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 E-Business Suite?

Attachments to an existing appointment or task in Microsoft Outlook that appear in the "description/note" section will not be uploaded to the Oracle E-Business Suite. 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 E-Business Suite. The actual file, however, will not be synchronized.

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 E-Business Suite.

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.

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 I synchronize appointments that span two or more days?

Appointments that span two days, e.g. 11pm to 1am cannot be synchronized.

Can I synchronize past appointments?

Yes, you can synchronize past appointments if the Transfer all scheduled items radio button is selected during setup.

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?

Yes, as long as not on the same computer.

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 E-Business Suite.

The Intellisync engine will synchronize these changes to the Oracle E-Business Suite, but the suite ignore these changes and they are not reflected in the appointment.

Troubleshooting Tips

This section contains information on some of the common problems associated with the synchronization process.

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 a valid task type.

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 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 applications within Oracle E-Business Suite using the same login name and password. If it works, then verify your registration.

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 or when the middle-tier server is down.

Action: Use the following steps to troubleshoot the problem:

1. Ask your system administrator to check if Apache is down.
2. If Apache is working, check the [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.

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.

Field Mappings

Intellisync uses the following data mapping for synchronization.

Note: The Start Date, End Date, Start Time and End Time fields factor in time zone conversion during synchronization.

Data Mappings

Functional Area	Oracle Applications	Outlook	Palm
Appointments			
	Name	Subject	Description
	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

Functional Area	Oracle Applications	Outlook	Palm
Business Contacts	Status	Status	N/A
	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

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

Overview of the Oracle Forms-based Calendar

The Forms-based Calendar module provides a mechanism of allowing people to define resource work shifts with the consideration of resource availability and associating them with a scheduling calendar, not a personal calendar used for managing daily activities. After these work shifts are defined, attached to a scheduling calendar, and associated with resources during implementation, the selection of qualified resources for a task in Assignment Manager can be based on the resource shifts and availability defined in the Forms-based Calendar.

Additionally, you can use the Calendar Datebook features in the Oracle Telesales application to view scheduled activities and create personal ToDos.

Note: With recent expansion, Calendar developed for Oracle Common Application Calendar adopts Oracle Applications Framework, the standard HTML development and deployment platform for Oracle Self-Service Applications, to provide another HTML version of essential calendar screens for integrated applications to uptake these features while re-building their functions. Calendar in Oracle Applications Framework is not fully compatible with HTML Calendar user interface. For basic use feature, see Chapter 10, Managing Appointments in Oracle Applications Framework. For detailed implementation and use features of the integrated applications, please consult product specific documentation.

The following topics provide additional information on calendar setup and the datebook:

- Calendar Set up window, page 38- 1
- Calendar Datebook, page 38- 2

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

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

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.

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

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 Oracle E-Business Center.

Steps

Click the Datebook icon from the application icon menu to access the Calendar Datebook.

Summary of Oracle Forms-based Calendar Tasks

Use the Oracle Forms-based Calendar to perform the following tasks:

Chapter 40, Managing the Forms-based Calendar

Managing the Forms-based Calendar

This chapter covers the following topics:

- Creating Tasks and ToDos in a Calendar
- Viewing the Datebook
- Creating a ToDo List

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, 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.
See: Creating , Updating, and Finding Tasks, page 29- 1 .
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, page 40- 2 .
5. Save your changes and close the Calendar.

Viewing the Datebook

Use the Datebook window to view a work shift, task, or time off for yourself or 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.

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**.

Introduction to Oracle Escalation Management

This chapter covers the following topics:

- Overview of Oracle Escalation Management
- Oracle Escalation Management Integrations
- Terms and Definitions

Overview of Oracle Escalation Management

A company, using Escalation Management, can re-prioritize, 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?, page 41- 1
- What is a Reactive Escalation?, page 41- 2
- What is a Proactive Escalation?, page 41- 2
- What Are Some of the Features of an Escalation?, page 41- 2

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.

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.

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.

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.

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.

Terms and Definitions

The following table describes Escalation Management terms and definitions.

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: • Business Rule Monitor • Business Rule Workbench
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.

Term	Description
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.
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

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 standalone 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.

Summary of Oracle Escalation Management Tasks

Use Oracle Escalation Management to perform the following types of tasks:

- Chapter 38 Reactive Escalations: Escalation Manager, page 43- 1
- Chapter 39 Proactive Escalations: Business Rule Monitor, page 44- 1
- Chapter 40 Using Escalation Manager, page 45- 1

Overview of Reactive Escalations: Escalation Manager

This chapter covers the following topics:

- What is Escalation Manager?
- Workflow Notifications
- Escalation Territories
- Escalation Owners and Owner Types

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.

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

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.

1. 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.
2. 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.

Escalation Owners and Owner Types

Each escalation must be assigned an owner and this owner must be a specified owner type.

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.

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

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.

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.

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, page 44- 2
- Create a Task Only, page 44- 2
- Notification and Create Task, page 44- 2
- Escalated Object, page 44- 2

Notification Only

An Oracle Workflow notification is sent. The person who receives this notification selects from the Value field in the Workflow Attributes window. Click the "..." button to display this attributes window.

Create a Task Only

An automated escalation task is created. This is generated through the seeded Automated Escalation Template Group for Task Manager (Service Request or Defect Management.) The owner and assignee of this task select from the Value field in the Workflow Attributes window.

Notification and Create Task

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.

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.

Note: If the unassigned option is selected in the Automated Escalation Notification Task Assignee Role field in the Workflow Attributes window, then the task that is created has no assignee, but it has an owner specified because you cannot find the unassigned option from the List of Values in the task owner role field.

Workflow Attributes

In addition to the Workflows which 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.

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.	• Business Owner • Document Owner • Document Owner's HR Manager • Escalation Territory Primary Contact
Create Task	Automated Escalation Notification Task Assignee Role	Assign the task to the person who fulfills the role indicated by the value selected.	• Business Owner • Document Owner • Document Owner's HR Manager • Escalation Territory Primary Contact • Unassigned

Workflow Name	Attribute	Meaning	Possible Values
Create Task	Automated Escalation Notification Task Owner Role	The task owned by the person who fulfills the role indicated by the value selected.	• Business Owner • Document Owner • Document Owner's HR Manager • Escalation Territory Primary Contact
Create Task	Automated Escalation Task Template	The template that is used to create the task.	Any Task Template
Send Notification and Create Task	Automated Escalation Notification Role	Send the notification to the person who fulfills the role indicated by the value selected.	• Business Owner • Document Owner • Document Owner's HR Manager • Escalation Territory Primary Contact
Send Notification and Create Task	Automated Escalation Notification Task Assignee Role	Assign the task to the person who fulfills the role indicated by the value selected.	• Business Owner • Document Owner • Document Owner's HR Manager • Escalation Territory Primary Contact • Unassigned
Send Notification and Create Task	Automated Escalation Notification Task Owner Role	The task owned by the person who fulfills the role indicated by the value selected.	• Business Owner • Document Owner • Document Owner's HR Manager • Escalation Territory Primary Contact

Workflow Name	Attribute	Meaning	Possible Values
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.	• Business Owner • Document Owner • Document Owner's HR Manager • Escalation Territory Primary Contact

Resource Types

A document owner can be of any resource type other than an employee resource. Some examples of other types of document owners are: parties or partners and supplier contacts. Since the automated escalation can happen to the document owner of any resource type, the person who will receive the notifications is determined as follows:

Document Owner

The Document Owner is selected as the value in the workflow attributes.

- If the document owner type is 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.

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 Different Types of Escalations
- Managing a Service Request Escalation
- Managing a Task Escalation
- Managing a Defect Escalation

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 standalone application, from the CRM Administrator responsibility, select **Task and Escalation Manager > Manage Escalations**.
 - 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.
1. Enter the customer's name and number.
2. Select the **Reference Documents** tab.
 1. Enter all relevant information if it has not already been automatically populated in the Type field.
 2. Enter all relevant information if it has not already been automatically populated in the Document and Details fields.
3. Select the **Contacts** tab.
 1. Enter all contacts (customer or employee).
 2. 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.
4. (Optional) Select the Audit tab to view all the changes once you are finished.
5. 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, page 45- 3

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.

Managing Different Types of Escalations

The following sections describe the process of managing different types of escalations:

- Managing a Service Request Escalation, page 45- 3
- Managing a Task Escalation, page 45- 5
- Managing a Defect Escalation, page 45- 6

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:
 1. A Status
 2. A Reason
 3. Target date
 4. The escalation level
5. Assign the escalation to yourself or another existing resource using one of the two methods listed:

Manual Assignment

1. Select a resource from the LOV.

Automatic Assignment

2. Click **Assign** to choose an escalation owner from the Assignment Manager.
3. Select the **Assisted Assignment** option and select **Territories**.
4. 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.

1. (Optional) Enter any additional contact points.
2. (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.
 1. (Optional) Click **Notes** to create a note about the escalation.
 2. (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.

Managing a Task Escalation

Perform the following steps to manage a standalone 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:
 1. A Status
 2. A Reason
 3. Target date
 4. The escalation level
5. Assign the escalation to yourself or another existing resource using one of the two methods listed:
Manual Assignment
 1. Select a resource from the LOV.**Automatic Assignment**
 2. Click **Assign** to choose an escalation owner from the Assignment Manager.
 3. Select the **Assisted Assignment** option and select **Territories**.
 4. 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.

5. 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.

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.

Working with Oracle User Management

This chapter covers the following topics:

- Introduction to Oracle User Management
- Logging into User Management
- Approving Pending User Requests
- Viewing Your Notifications
- Approving Requests from the Notification Window
- 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

Introduction to Oracle User Management

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.

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**.

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.

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, page 46- 3

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:
 1. Click **Reassign**.
 2. Enter the Approvers name or click the Up arrow icon to search for an approver.
You are responsible for verifying
 3. Select the **Delegate Authority for responding to this notification** option button to send the request to an approver who transfers ownership of this notification
 4. Enter any comments you want the new approver to view.
 5. Click **OK**.

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, page 46- 5
- Creating a User, page 46- 6
- Editing a User's Details, page 46- 7
- Deleting a User, page 46- 8
- Defining a User's Roles, page 46- 9
- Defining a User's Account, page 46-10
- Defining a User's Enrollment, page 46-11

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, page 46- 4
- Creating a User, page 46- 6
- Editing a User's Details, page 46- 7
- Deleting a User, page 46- 8
- Defining a User's Roles, page 46- 9
- Defining a User's Account, page 46-10
- Defining a User's Enrollment, page 46-11

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, page 46- 4
- Searching for a User, page 46- 5
- Editing a User's Details, page 46- 7
- Deleting a User, page 46- 8
- Defining a User's Roles, page 46- 9
- Defining a User's Account, page 46-10
- Defining a User's Enrollment, page 46-11

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:
 1. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.

2. Enter a minimum of three characters into to the search field.
The "%" and "_" (underscore) symbols are wildcards.
3. Click **Go**.
A list of search results 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, page 46- 9 for details.
10. (Optional) Click **Enrollments** to view or update the enrollments associated with this user.
See Defining a User's Enrollment, page 46-11 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, page 46-10 for details.
13. click **Update** when you have completed your modifications.

See Also

- Viewing All Users, page 46- 4
- Searching for a User, page 46- 5
- Creating a User, page 46- 6
- Deleting a User, page 46- 8

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:
 1. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.
 2. Enter a minimum of three characters into to the search field.
The "%" and "_" (underscore) symbols are wildcards.
 3. Click **Go**.

A list of search results 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 an notification to the email address associated with that user.

See Also

- Viewing All Users, page 46- 4
- Searching for a User, page 46- 5
- Creating a User, page 46- 6
- Editing a User's Details, page 46- 7
- Defining a User's Roles, page 46- 9
- Defining a User's Account, page 46-10
- Defining a User's Enrollment, page 46-11

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, page 46- 4
- Searching for a User, page 46- 5
- Creating a User, page 46- 6
- Editing a User's Details, page 46- 7
- Deleting a User, page 46- 8
- Defining a User's Account, page 46-10
- Defining a User's Enrollment, page 46-11

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, page 46- 4
- Searching for a User, page 46- 5
- Creating a User, page 46- 6
- Editing a User's Details, page 46- 7
- Deleting a User, page 46- 8
- Defining a User's Roles, page 46- 9
- Defining a User's Enrollment, page 46-11

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, page 46- 4
- Searching for a User, page 46- 5
- Creating a User, page 46- 6
- Editing a User's Details, page 46- 7
- Deleting a User, page 46- 8
- Defining a User's Roles, page 46- 9
- Defining a User's Account, page 46-10

Glossary

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 e-mail 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 JTREG_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/TBH 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 "JTAPPROVER" permission. The request owner is tied to the JTUM_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 is 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 WUSER table.

Users can be grouped into groups.

user group

A user group is any grouping of FND_USERS who are exposed through the WROLES 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 WROLES 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 Oracle 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.

