SIEBEL 7
eBusiness

SIEBEL ASSIGNMENT MANAGER ADMINISTRATION GUIDE

VERSION 7.5. REV. B
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Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404

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Introduction

This guide provides information necessary to implement, configure, and administer Siebel Assignment Manager. Chapters are organized in a way that allows users to move throughout the guide for various tasks. Introductory material, assignment manager concepts, and potential strategies for product use are explained in Chapter 1, "Assignment Concepts," and Chapter 2, "Assignment Strategy." Chapter 4, "Assignment Rules," and Chapter 5, "Running Assignment Manager," are important to those interested in applying the introductory knowledge to actual implementations of Assignment Manager. Chapter 3, "Assignment Manager Configuration," and Chapter 6, "Advanced Configuration," provide detailed instructions for those users who require specific configurations to Assignment Manager functionality. Concluding this guide are two appendixes. Appendix A, "Assignment Object Parameters," describes properties of assignment objects, and Appendix B, "Assignment Manager Error Messages," describes the error codes that can appear when processing Assignment Manager.

Several other server processes, not fully documented in this guide, play an integral role in Assignment Manager functionality. The Siebel System Administration documentation, especially *Siebel Business Process Designer Administration Guide,* and *Siebel Server Administration Guide* should be used as additional references when using Assignment Manager with these processes. For application development, see *Siebel Tools Reference*.

Who Should Use This Guide

As part of the System Administration documentation set, this guide provides information necessary to implement, configure, and administer Siebel Assignment Manager.

This book is useful primarily to people whose title or job description matches one of the following:

Database Administrators	Persons who administer the database system, including data loading; system monitoring, backup, and recovery; space allocation and sizing; and user account management.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department. Duties include designing and managing campaigns, product marketing information, and product distribution lists.
Sales and Service Administrators	Persons responsible for setting up and maintaining a sales or service department. Duties include designing the business requirements necessary for service and sales deployments.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

The user should possess skills in SQL, RDBMS, and network connectivity using TCP/IP. Previous experience with application and database software is helpful.

Product Modules and Options

This Siebel Bookshelf contains descriptions of modules that are optional and for which you may not have purchased a license. Siebel's Sample Database also includes data related to these optional modules. As a result, your software implementation may differ from descriptions in this Bookshelf. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Siebel sales representative.

Revision History

Siebel Assignment Manager Administration Guide

Version 7.5, Rev. B

Table 1. Changes Made in Version 7.5, Rev. B

Topic	Revision
"Individuals" on page 21	Corrected information in Table 3.
"Assignment Rule Groups" on page 25	Added information about how to use rule groups.
"Assignment Rule Sequencing" on page 26	Corrected topic content.
"Server Key Maps" on page 29	Corrected topic content and added more information about the server key mapping feature.
"Assignment Criteria" on page 32	Added last sentence to comments for the Include inclusion method in Table 7.
"Nonrequired Assignment Criteria" on page 38	Added for Windows NT to the procedure heading and replaced step 8.
"Workload Criteria" on page 43	Added the All Organizations flag to the first note.
"Assignment Logic and Scoring" on page 51	Changed title to include Scoring.
"Assignment Methodology" on page 53	Added note to Step 3.
"Assignment Operation Modes" on page 60	■ Removed parenthetical text from the Contact Denormalization and Product Denormalization bulleted items. ■ Added second paragraph (following bullets).
"Creating Assignment Objects" on page 98	Added tip to Step 2.
"Configuring Assignment Objects for Availability-Based Assignment" on page 107	Added content to the Calendar Create Activity value in Step 4 of the To configure Availability-based Assignment for an assignment object procedure.

Table 1. Changes Made in Version 7.5, Rev. B

Topic	Revision
"Creating Assignment Rules" on page 161	In Table 17: ■ Added a footnote for the Activation and Expiration fields. ■ Added to the descriptions for All Organizations and All People fields. ■ Added note to the Minimum Score field description.
"Creating Assignment Rule Groups" on page 165	In Table 18: ■ Added a footnote for the Activation and Expiration fields. ■ Added Key Based field description.
"Adding Employees to Assignment Rules" on page 189	Added a footnote for the Activation Date/Time and Expiration Date/Time fields in Table 24.
"Adding Positions to Assignment Rules" on page 195	Added a footnote for the Activation Date/Time and Expiration Date/Time fields in Table 25.
"Adding Organizations to Assignment Rules" on page 199	Added a footnote for the Activation Date/Time and Expiration Date/Time fields in Table 26.
"Releasing Assignment Rules" on page 202	Added result to Step 2 and note following that step.
"Migrating Assignment Rules" on page 203	Added topic.
"Running Assignment Manager in Interactive Mode" on page 216	■ Deleted second and third paragraphs. ■ Deleted Table 29 and note following the table. ■ Reorganized section and added a subtopic.
"Running Assignment Manager in Batch Mode" on page 236	Corrected Step 3d.

Table 1. Changes Made in Version 7.5, Rev. B

Topic	Revision
"Assigning Child Accounts Based on Parent's Primary Address" on page 254	■ Corrected title of topic. ■ Reinstated missing information for Step 7.
"Reassigning Accounts to a Different Primary Position" on page 257	Incorporated last three paragraphs in topic into the To reassign accounts to a different position procedure.
"System Preferences Compatibility" on page 270	Added Default Organization to the Assignee of Unowned preference in Table 36.
"Assignment Object Parameter Usage" on page 276	Added a paragraph to the usage comments in Table 39 for the following run-time parameters: ■ Default Employee ■ Default Organization ■ Default Position
"Set Primary Position" on page 287	Corrected note in the usage comments for this run-time parameter.
"Run-Time Parameter Default Values" on page 288	In the procedure: ■ Added step 2. ■ Corrected step 4.

January 2003 Bookshelf

Table 2. Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
"Skills"	Added information about predefined skills at beginning of section.
"Contact Denormalization"	Added next to last paragraph in topic.
"Product Denormalization"	Removed the following sentence from last paragraph in topic: "You can also configure Assignment Manager to run Batch Assignment in this mode."
"Assigning Skills to Employees, Positions, and Organizations"	Added this topic. Before version 7.5, Rev. A, was documented in *Applications Administration Guide*.
"To configure interactive assignment for an assignment object"	Removed last bullet from Step 4.
"Creating Skills and Using Skill Tables"	Added this topic.
"Creating Workflow Policy Components"	Added note after second paragraph.
"To define workload criteria for organizations"	Rewrote the description for the Required workload criteria field to reflect there are two options.
"Adding Employees, Positions, and Organizations to Assignment Rules"	Changed all variations of the word *assign* to *add* throughout this section.
"Adding Positions to Assignment Rules"	Removed note about not deleting positions near the end of the section.
"Adding Organizations to Assignment Rules"	■ Corrected List name in Step 4. ■ Added third from last paragraph in topic.
"Checking the Assignment Manager and Server Request Broker Components"	Added note after Step 3.

Table 2. Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
Chapter 5, "Running Assignment Manager"	Reworded note in second set of bullets to include information about how to automatically refresh skills without restarting the Assignment Manager component.
"Checking the Assignment Manager and Server Request Broker Components"	Added note at end of topic.
"Running Interactive Assignment Using the Command-Line SRVRMGR Utility"	Added MaxSkillsAge parameter to table.
"Running Workflow Monitor Agents"	Added note after first paragraph.
"To run Batch Assignment"	Reworded caution after Step 8 because of change in functionality.
"Running Multiple Instances of Assignment Manager in Batch Mode"	■ Added third paragraph to topic (immediately following bulleted items). ■ Added when not to run batch assignment near end of topic.
"Assigning Objects Based on the Primary Address"	Added note after first paragraph specific to Siebel Life Sciences.
"Reassigning Accounts to a Different Primary Position"	Added second sentence to first paragraph.
"Stopping Assignment of Organizations for Accounts"	Added this topic.
"Setting the Lock Assignment Default Value for Activity Assignment Objects"	Added this topic.
Appendix A, "Assignment Object Parameters"	Added note to the description for the Lock Assignment Column parameter.
"Activity Object Parameters"	Added content after note (before the table).
Appendix B, "Assignment Manager Error Messages"	Added this appendix.

Assignment Concepts 1

Siebel Assignment Manager allows sales and service organizations to assign the most qualified people to specific tasks. Assignment Manager accomplishes this function by matching candidates to predefined and user-configurable assignment objects. To assign the most qualified candidate to each object, Assignment Manager applies assignment rules that you define. For you to define assignment rules, you select:

- Objects to which each assignment rule applies
- Rule Groups to which each assignment rule applies (optional)
- Criteria for each assignment rule
- Values for each assignment criteria
- Skills to match assignment rules, objects, organizations, employees, and positions
- Expertise to weigh skill scores
- Scores for each assignment rule, criteria, and value
- Candidates that are scored using the assignment rule
- Workload rules to balance work across your organization

For example, in a sales organization, you can create an assignment rule that scores positions (candidates) based on territory definitions (criteria) for an opportunity (object). In a service organization, you can create an assignment rule that scores employees (candidates) based on product expertise (criteria) for a service request or product defect (object). Using the sum of scores for each assignment rule, Assignment Manager assigns the best candidates for each object.

You can also customize the way Assignment Manager makes assignments by:

- Defining how attributes are matched by using:
  - Inclusion and exclusion methods
  - Different comparison methods
  - Wildcard values
- Defining how objects are matched by using Multitiered assignment
- Defining how assignment rules are matched by using:
  - assignment rule groups
  - assignment rule sequencing
- Creating and configuring your own components, including:
  - Objects
  - Assignment criteria
  - Criteria values
  - Assignment attributes
- Running Assignment Manager in different operation modes to process assignments:
  - Interactively in real time
  - Dynamically when database changes are made by connected or mobile users
  - Periodically assigning objects in batches

This chapter explains how Assignment Manager works and how it can be configured to meet your organization's needs.

Assignment Manager Components

This section defines the components used by Assignment Manager. The components are:

Assignment Objects

In Siebel Assignment Manager, objects represent assignment entities to which candidates are matched based on assignment rules. A number of predefined assignment objects are available for use by Assignment Manager for the most commonly used business entities in Siebel eBusiness Applications. The predefined assignment objects are:

- Account
- Activity
- Campaign
- Campaign Contact
- Contact
- Opportunity
- Order (Sales Credit Assignment)

- Product Defect
- Project
- Project Team
- Service Request

If your deployment requires other objects, or if you need to modify predefined objects, you can create new objects and configure existing objects using Siebel Tools. For more information, see "Assignment Object Configuration" on page 96.

Candidates

In Siebel Assignment Manager, candidates represent the people who are evaluated as potential assignees for objects. Depending on the assignment rule you use, and the object to which a candidate is assigned, candidates can be positions, employees, or organizations, and can be assigned as individuals or as members of a team. For information about the predefined assignment objects and recommended candidate assignments, see Table 3 on page 22.

Positions

Positions represent candidates distinguished by their job functions, and are typically used as candidates in sales organizations. For example, a sales organization would want to assign positions to objects, because these positions are responsible for a region or territory.

By assigning objects to positions, you can have one sales representative inherit the opportunities, accounts, and contacts from another representative by reassigning the employee responsible for a specific position.

Employees

Employees represent candidates distinguished by their skills and product expertise, and are typically used as candidates in service organizations. For example, a service organization would want to assign employees with the proper skills and expertise to objects, because these employees possess specific skills that are related to the service request or activity. Assignment Manager can also take into account a specific employee's work schedule, calendar, and regional schedule when determining assignments by creating rules based on an employee's availability.

Organizations

An organization represents a group of positions that has limited visibility to particular application data. For example, your company can create separate and distinct organizations to distribute specific information to organizational groups both inside and outside of your enterprise. Both internal and external users are granted access only to the information that they should see (such as accounts, opportunities, and contacts) and data they need to see (such as price lists, products, and literature).

By assigning objects to organizations, you can maintain better security and promote proper business practices by controlling data access and visibility between different organizations. For example, you can limit your distributors' data access by giving them visibility to product information, but restrict their visibility to price lists for the products. To do this, you can create a separate organization for your distributors that does not have access to the price list data. In this case, the price lists are not available to your distributors even if they are assigned to the products.

Some objects allow the assignment of a single organization, whereas other objects allow the assignment of multiple organizations to the same object. For more information, see Table 3 on page 22.

For more information on organizations, see *Applications Administration Guide*.

Teams

A team represents a group of employees or positions. Assigning a team allows you to assign a group of individuals that possess various skills or job functions to a particular object.

In sales organizations, teams are typically assigned to objects. For example, you can assign a sales representative and a sales consultant to an opportunity. Or you can can assign a team of sales professionals—two district representatives, a regional manager, and a sales engineer—to work a single, large sales opportunity.

Individuals

An individual represents a single employee or a position. Assigning individuals allows you to assign exclusive ownership to an individual who possesses a specific skill or expertise for a particular object.

In service organizations, individuals are typically assigned to objects. For example, you can assign a customer service representative with expertise in disk drives to all service requests that are marked for this area.

Table 3 shows which candidates can be assigned to each of the predefined assignment objects. This table also shows which assignment objects are restricted to a single assignee, and assignment objects that are capable of incorporating a team of assignees. *S* indicates the ability to allow only a single owner or assignment; *M* indicates the ability to allow multiple owners or team assignments.

Table 3. Summary of Predefined Assignment Objects

Assignment Object	Candidate		
	Position	Employee	Organization
Account	M		M
Activity		S	
Campaign	M		M
Campaign Contact	S		S
Contact	M		M
Opportunity	M		M
Product Defect		S	
Project		M	M
Project Team		M	
Service Request		S	M

If you need to modify the default properties—for example, if you want to assign Accounts to Employees—you can do so by configuring the assignment object properties using Siebel Tools. For more details, see "Assignment Object Configuration" on page 96.

Primaries

A primary on an assignment rule represents the candidate (employee, position, or organization) that is assigned as the primary owner of the assignment object if the candidate passes the criteria for that object. The primary is the main or first owner of an assignment object. For assignments that allow only single assignees, the single assignee becomes the primary assignee as well.

Assignment Rules

Siebel Assignment Manager uses assignment rules to match assignment objects to candidates. Multiple assignment rules can be active for each assignment object. An assignment rule can also apply to multiple objects because the assignment object field supports multiple selections.

Assignment rules use scores to rate candidates and select potential assignees. Candidates that qualify for an assignment rule have the assignment rule score added to their total score. For example, Figure 1 shows a High Priority assignment rule that applies 20 points to the candidate's total score if the candidate meets the priority levels defined in the rule's criteria.

Assignment Rules

Query | Release | 1 - 7 of 8+

Name	Object	Activation	Expiration	Score	Minimum Score	Assignees from Rule
High Priority				20	0	One, Best Fit
*Assign Mid Market Oppor	Opportunity	12/31/1998 12:00:0(	12/30/2002 12:00:0(	100	80	One, Best Fit
Asia	Account	10/31/1998 4:00:00	12/30/1999 4:00:00		10	All, Above Minimum
Assign Service Request E	Service Request	12/31/1998 4:00:00	12/30/2002 4:00:00		0	All, Above Minimum
Assign Upgrade Service F	Service Request	12/31/1998 4:00:00	12/30/2002 4:00:00		0	All, Above Minimum
California	Account	10/31/1998 4:00:00	12/30/2002 4:00:00		10	All, Above Minimum
California Service Region	Activity	01/01/2000 12:38:0(	12/30/2002 4:00:00		10	All, Above Minimum

Figure 1. Sample Assignment Rule

Table 4 shows the four methods used by Assignment Manager to determine which potential assignees are assigned to the object from each assignment rule.

Table 4. Types of Assignment Rules

Assignees from Rule	Description
All, Above Minimum	Use assignees with an assignment score greater than or equal to the assignment rule's minimum score.
All, Must Assign	Same as All, Above Minimum, except that the highest-scoring candidate is a potential assignee even if all candidates fail to meet the minimum score.
One, Best Fit	Use the assignee with the highest assignment score from this assignment rule.
One, Random	Choose a random assignee whose score is greater than or equal to the minimum score required for this assignment rule.

The assignment rule method determines how candidates are evaluated as potential assignees to the object. In the example shown in Figure 1 on page 23, only the highest-scoring candidate is used because the assignment rule uses the One, Best Fit method.

For information about creating, defining, and configuring assignment rules, see Chapter 4, "Assignment Rules."

Assignment Rule Groups

Assignment Manager allows you to group assignment rules, splitting them up by business function or other categories. An assignment rule group can include multiple assignment rules, however, an assignment rule can belong to only one rule group.

Rules not associated with a user-defined group belong to a group known as Default Group. This group name (Default Group) is not visible in the Assignment Rule Group view, but is an inherent part of Assignment Manager. Rules upgraded from previous versions of Assignment Manager to version 7.5 are automatically associated with the Default Group. For information about how to create user-defined groups, see "Creating Assignment Rules" on page 161.

You can use rule groups to split the load between multiple assignment servers by defining a server key map. The server key map defines which rule groups load and process for each server. You can also use the server key map to configure a server to load multiple rule groups. For more information about server key maps, see "Server Key Maps" on page 29 and "Defining Server Key Maps" on page 168. However, you cannot run assignment rules associated with rule groups and assignment rules associated with the Default Group on the same server because the two tasks are mutually exclusive functionalities. For example, you cannot use the same assignment server to run resource assignment (used for professional service automation and does not use rule groups) and credit assignment (used for sales and does use rule groups). You should run assignment for each on different servers.

When running batch assignment, Assignment Manager can load a particular rule group into memory for each task, resulting in better performance (as compared to batch assignment loading all active rules into memory). For more information about batch assignment, see "Running Assignment Manager in Batch Mode" on page 236.

Assignment Rule Sequencing

Assignment Manager can evaluate assignment rules in a specified sequence. When you assign sequence numbers to assignment rules, Assignment Manager evaluates those rules in that sequence in ascending order. Assignment rule sequencing provides a means for you to prioritize the rules that apply to any given assignment object by order of importance, thereby limiting the number of rules that Assignment Manager checks for assignment.

If none of the rules have a sequence number, or if all of the rules have the same sequence number, then Assignment Manager processes all the rules. However, if some of the rules in the group have sequence numbers and other rules do not, the rules with no specified sequence number are considered to have a sequence number of 0 and are evaluated first. Therefore, you should give every rule a sequence number if you use sequencing.

NOTE: You can use sequencing even if you are not using rule groups.

Assignment Manager can also evaluate, at periodic intervals in the sequence, whether or not an item has been assigned; and if it has, Assignment Manager stops evaluating the rest of the rules in that sequence. The sequences are specified in segments so that Assignment Manager can pause between segments to find out whether assignment has been made, as shown in Table 5 on page 27. When a rule results in successful assignment, Assignment Manager processes the rest of the rules having the same sequence number and then stops processing. Subsequently, the rules with higher sequence numbers do not get processed.

Assignment Manager identifies the beginning and end of a segment within a sequence by the change in sequence number. For example, Assignment Manager first evaluates rules with a sequence number of 1, then evaluates rules with a sequence number of 2, and so on. It does not matter, however, how rules within a segment are evaluated.

At runtime, Assignment Manager evaluates the rules in the first segment (Segment 1) first, then stops to find out whether an assignment has been made. If it has assigned, Assignment Manager does not continue. If it has not assigned, then Assignment Manager continues to the next sequence (Segment 2).

Table 5. Example of a Rule Sequence

Segment	Assignment Rule	Sequence #
1	Assign Sales Rep West	1
	Assign Sales Rep North	1
	Assign Sales Rep East	1
2	Assign Sales Rep West	2
	Assign Sales Rep North	2
3	Assign Sales Rep West	3
	Assign Sales Rep North	3
	Assign Sales Rep East	3

If Assignment Manager is running with multiple groups loaded into memory, each with its own sequence, then Assignment Manager evaluates the rules as if they are part of one big group with one sequence.

For example, if there are two groups loaded by the same Assignment Manager instance with the sequences shown in the following table:

Group A	Group B
1	1
1	1
1	2
2	2
2	3
3	3
3	3

Then, this is the order Assignment Manager evaluates those rules:

A1
A1
A1
B1
B1
A2
A2
B2
B2
A3
A3
B3
B3
B3

Sequence numbers can be assigned to assignment rules when creating new assignment rules or can be added to assignment rules at a later time. For more information about assignment rules, see "Defining Assignment Rules" on page 159.

Server Key Maps

A server key map defines the rule groups that load and process for each server. You can configure a server to load multiple rule groups. When you define server key maps, you are actually dividing the rules among the different servers. Server key maps are defined in the Server Key Map view in the Assignment Administration screen. For information about defining server key maps, see "Defining Server Key Maps" on page 168.

You submit an assignment request by specifying the AsgnKey parameter, where the AsgnKey parameter is the row id of the assignment rule group that is associated with the rules you want to evaluate. When using AsgnSrvr, the AsgnKey parameter must be the row id of one of the rule groups defined for the server in the Server Key Mappings view. The assignment server (AsgnSrvr) first looks for entries in the server key map for a specific server, and then loads rules for only those rule groups associated with that server key map. Assignment Manager uses key-based routing to route the request to a particular instance of Assignment Manager where the rules are loaded for that rule group.

You can specify multiple servers to load the same rule group. Assignment Manager routes requests to one of the servers where that rule group is based on load balancing metrics.

However, the server key mapping feature is only supported in certain environments, as follows:

- Interactive and dynamic assignment

  For interactive and dynamic assignment, Assignment Manager does not support invocation of rules through rule groups. You cannot assign server key mappings in these environments, therefore, all active rules are processed.

- Script or Workflow Process Calling a Business Service

  You can invoke Assignment Manager through a business service from within a workflow process, or from a script, using one of the following predefined business services:

- **Synchronous Assignment Manager Requests business service**. This business service has one method available: Assign. This method sends a request to the assignment manager server component using the AsgnObjName and ObjRowId parameters. All active rules in the database are processed.

  Use this business service:

  - To submit requests to assign a single object row.
  - With the Default Group (no server key maps defined).

  NOTE: You cannot use this business service to invoke rules based on rule groups.

- **Server Requests business service**. You can use this generic business service to submit requests to the server request broker. With this business service, you can use the Assignment Manager server mapping feature. If using this business service to invoke rules based on rule groups, pass the AsgnKey parameter as the input parameter, and pass the ReqKey parameter as a request parameter (in the child property set for the component). Set the AsgnKey and ReqKey parameters to the rule group ID of the relevant rule group.

  NOTE: You can use this business service with the server key mapping feature.

For more information about business services, see *Siebel Business Process Designer Administration Guide*.

- Batch Assignment

  You can start a batch assignment task with a particular group of rules loaded. This task is performed by specifying the row id of the rule group in the Assignment Key (AsgnKey) parameter for the task. If the Asgnkey parameter is specified when submitting a batch assignment request, Assignment Manager loads only rules of that rule group. If the AsgnKey parameter is not specified when submitting a batch assignment request, Assignment Manager loads all rules in the Default Group. For more information about the Default Group and loading a particular group of rules, see "Assignment Rule Groups" on page 25.

  NOTE: Batch assignment does not read entries from the server key map; only AsgnSrvr reads entries from the server key map.

  Assignment Manager stores rule information in a cache file, and there are different cache files for each assignment mode. Batch assignment uses the batchrulecache.dat file to store information. After the cache file is created, Assignment Manager loads the rules from this cache file instead of from the database, resulting in faster loading. However, the next time an assignment is submitted and given the rules have been released, the rules again load from the database and the cache file is recreated.

  For example, if you submit a request for rule group A, Assignment Manager loads the rules from the database, creates a batchrulecache.dat file, and processes the rules for group A. If another similar request for rule group A is initiated, Assignment Manager uses this same cache file. However, if you submit a request for rule group B, Assignment Manager loads the rules from the database, overwrites the batchrulecache.dat file, and processes the rules for group B. Then, if you submit another request for rule group A, Assignment Manager reloads from the database because the batchrulecache.dat file has rules only for rule group B. For more information about the AsgnKey parameter, see "AsgnKey" on page 242.

NOTE: Siebel Incentive Compensation and Siebel Marketing are specifically designed to use the server key mapping and rule group features. For more information, see *Siebel Incentive Compensation Administration Guide* and *Siebel Marketing Guide*.

Assignment Criteria

Assignment rules use criteria to determine which candidates qualify as potential assignees. Criteria also determine which assignment rule should be evaluated in assigning an object. An assignment rule can include none, one, or many criteria. Criteria are sets of conditions describing the attributes of objects or candidates, or both, that are evaluated to determine optimal assignment.

Each criteria uses five types of comparison methods to determine if candidates meet the criteria. Table 6 shows the available types of assignment criteria.

Table 6. Assignment Criteria Comparison Methods

Comparison Method	Description
Compare to Object	Compares criteria values to object attributes. Objects that possess the required criteria values qualify for this criteria.
Compare Object to Person	Compares object attributes to candidate attributes. Candidates that possess the attributes required by the object qualify for this criteria.
Compare to Person	Compares criteria values to candidate attributes. Candidates that possess the attributes required by the criteria qualify for this criteria.
Compare to Organization	Compares criteria values to organization attributes. Organizations that possess the attributes required by the criteria qualify for this criteria.
Compare Object to Organization	Compares object attributes to organization attributes. Organizations that possess the attributes required by the object qualify for this criteria.

Depending on the comparison method, candidates that meet the criteria have the criteria score added to their total score.

NOTE: Assignment rules can be created with no criteria. A rule of this nature functions to make sure all data items of a particular object type are assigned, that is, all objects of the defined type pass. Use these rules carefully as a rule defined with no criteria can make assignments that are not required. Assignment rules with no criteria and no assignment object specified are ignored by Assignment Manager.

You should be especially careful creating rules with no criteria using Batch Assignment. This mode can produce a very large number of assignments, because all objects in the database that have rules with no criteria pass and are assigned in this mode. This can result in a backlog of requests that may cause the whole environment to stop working if the database or file system runs out of space. Therefore, assignment rules with no criteria should be used sparingly with Batch Assignment.

Criteria also use an inclusion method to:

- Define how candidates are selected if the criteria is marked as Required.
- Determine if the criteria score are added to the candidate's total score if the criteria are satisfied.

Table 7 shows the types of inclusion methods for assignment criteria.

Table 7. Assignment Criteria Inclusion Methods

Inclusion Method	Comments
Include	At least one value needs to match: ■ For Compare to Object, the object attribute must match at least one listed criteria value. ■ For Compare to Person, the candidate attribute must match at least one listed criteria value. ■ For Compare Object to Person, at least one value of the object attribute must match one value of the candidate attribute. ■ For Compare to Organization, the organization attribute must match at least one listed criteria value. Note: For Compare Object to Organization, at least one value of the object attribute must match one value of the organization attribute. Assignment Manager stops processing this method when one value is matched.
Include All	All values must match: ■ For Compare to Object, the object attribute must match all listed criteria values. ■ For Compare to Person, the candidate attribute must match all listed criteria values. ■ For Compare Object to Person, all values of the object attribute must match all values of the candidate attribute. ■ For Compare to Organization, the organization attribute must match all listed criteria values. For Compare Object to Organization, all values of the object attribute must match all values of the organization attribute.

Table 7. Assignment Criteria Inclusion Methods

Inclusion Method	Comments
Include All Matching	This method only works with objects that have skills defined. If an object has a skill with a number of skill items, then all the items do not need to match for the skill to pass, as long as at least one item matches. The more items of the skill that match, the higher the score of the passing skill: ■ For Compare to Object, the object skill item must match at least one listed criteria value. ■ For Compare Object to Person, at least one of the object skill items must match one of the candidate skill items. For Compare Object to Organization, at least one of the object skill items must match one of the organization skill items.
Exclude	All values must not match: ■ For Compare to Object, the object attribute must not match any of the listed criteria values. ■ For Compare to Person, the candidate attribute must not match any of the listed criteria values. ■ For Compare Object to Person, no values of the object attribute can match any values of the candidate attribute. ■ For Compare to Organization, the organization attribute must not match any of the listed criteria values. For Compare Object to Organization, no values of the object attribute can match any values of the organization attribute.

Figure 2 shows a Service Request Priority assignment criteria that uses the Compare to Object comparison method. In this case, candidates for this assignment rule have 50 points added to their total score if the object has a Service Request Priority value of High.

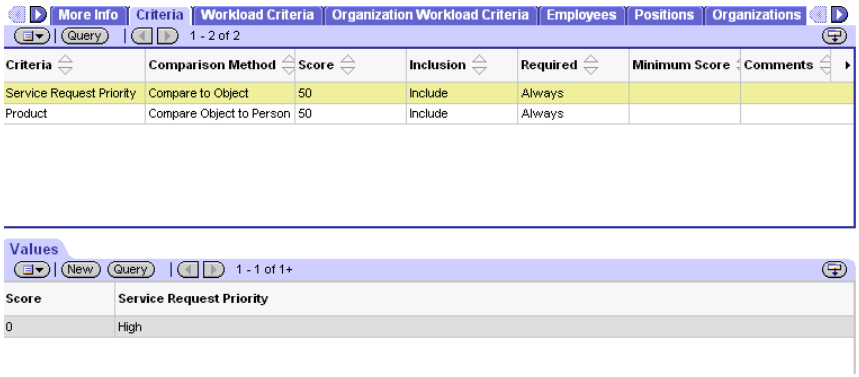

Figure 2. Sample Assignment Criteria

Siebel Assignment Manager provides predefined criteria that are related to sales and service organizations. If your organization requires other criteria, you can create new criteria using Siebel Tools. For more details, see "Assignment Criteria Configuration" on page 117.

Assignment criteria can be enabled for multilingual list of values (MLOV) capabilities. MLOV allows assignment criteria to be stored in a form that can be retrieved and displayed in a variety of supported client languages. For more details on this feature, see *Siebel Tools Reference*. For configuration details, see "Configuring MLOV for Assignment Attributes" on page 124.

Required Assignment Criteria

Use required assignment criteria to match related objects and candidates to assignment rules. You can make criteria required by selecting Always from the picklist in the Required field. Depending on the criteria's comparison method, the object or the candidate (or both) must meet the required criteria to qualify for the assignment rule. Table 8 shows the different requirements for each comparison method.

Table 8. Required Criteria Requirements

Criteria Comparison Method	Requirement
Compare to Object	The object must meet the required criteria to qualify for the assignment rule.
Compare Object to Person	Both the object and the candidate must meet the required criteria to qualify for the assignment rule.
Compare to Person	The candidate must meet the required criteria to qualify for the assignment rule.
Compare to Organization	The organization must meet the required criteria to qualify for the assignment rule.
Compare Object to Organization	Both the object and the organization must meet the required criteria to qualify for the assignment rule.

For example, an assignment rule can have a required Service Request Severity assignment criteria with a Compare to Object comparison method and a criteria value of 1-Critical. In this case, if the object to be assigned has a service request severity of 1-Critical, the object qualifies for the assignment rule. An object without a service request severity value or one that has a lower service request severity value does not qualify for the assignment rule.

Required When Available Assignment Criteria

Use required when available assignment criteria to match related objects and candidates to assignment rules only when the assignment criteria is available for the object or candidate. You can make criteria required when available by selecting When Available from the picklist in the Required field.

An assignment criteria is not available for an object or candidate if the assignment criteria does not include criteria values or corresponding skills that match the object or candidate. Required when available assignment criteria allow you to create assignment criteria that are required only when the object or candidate is defined with matching criteria values or skills.

For example, an assignment rule can have a required when available Service Request Severity assignment criteria with a Compare to Object comparison method and a criteria value of 1-Critical. In this case, if the object assigned has a service request severity of 1-Critical, the object qualifies for the assignment rule. An object that has a lower service request severity value does not qualify for the assignment rule. However, an object without a service request severity value qualifies for the assignment rule (because the criteria value is null, or not available).

NOTE: If an assignment criteria uses a Compare Object to Person comparison method, and criteria value is not found on a person, the criteria fails because availability applies only to the object.

Nonrequired Assignment Criteria

Use nonrequired assignment criteria to further determine a suitable match between candidates and assignment rules. You can make criteria nonrequired by selecting Never from the picklist in the Required field. Use nonrequired criteria that include scores to apply scores to candidates. These scores are added to the total scores of the candidates for this assignment rule. By using nonrequired criteria with scores, you can add a higher score to candidates that satisfy this criteria, while keeping candidates that do not satisfy the criteria.

If an assignment rule does not include any required criteria and an object has not been selected for the rule, you must define the assignment rule with nonrequired criteria that apply to objects that you want to assign. If an assignment object has not been defined for an assignment rule, Assignment Manager determines whether the assignment criteria can be applied to the object before the criteria is qualified.

For example, you should use service-related criteria (such as Service Request Priority) for an assignment rule that are applied to service-related objects (such as Service Request). If you create an assignment rule with Server Request Priority as nonrequired criteria, Assignment Manager does not qualify any accounts for the criteria because Service Request Priority does not apply to accounts.

If an assignment rule uses only nonrequired assignment criteria, then the assignment rule passes even if the minimum score for the rule is not satisfied, because the assignment criteria are not required. To avoid this behavior, you can alter Assignment Manager so that assignment rules pass only when the minimum score for the rule is satisfied, even if the assignment criteria are not required.

To require that an assignment rule satisfies the minimum score for the rule for the rule to pass, set the environment variable SIEBEL_AM_MINRULESCORE to TRUE. By default, this parameter is set to FALSE. You also need to define this variable as a system variable, not a user–defined variable.

To set the SIEBEL_AM_MINRULESCORE system variable for Windows NT

1. In Windows NT, choose Start > Settings > Control Panel.
2. Double-click System.
3. In the System Properties dialog box, select the Environment tab.
4. Click any variable in the Systems Variables list applet.
5. In the Variable field, type `SIEBEL_AM_MINRULESCORE`.
6. In the Value field, type `TRUE`.
7. Click Set, and then click Apply.
8. Stop the Siebel Server services and reboot the Windows NT machine.

NOTE: This variable must be set on Siebel Servers that execute Assignment Manager.

Figure 3 shows an example of setting the SIEBEL_AM_MINRULESCORE system variable.

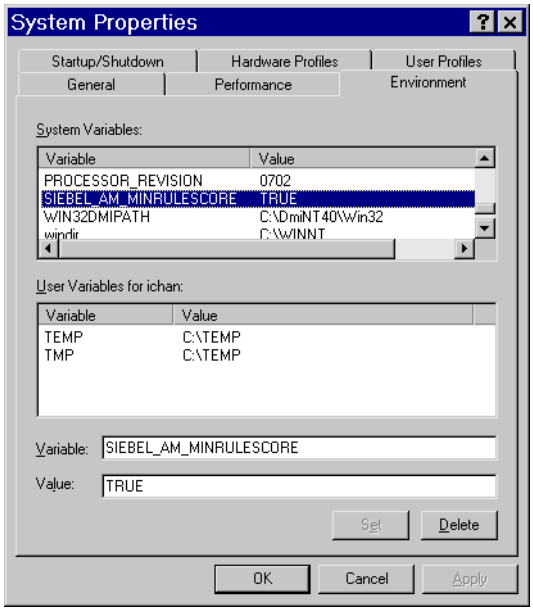

Figure 3. Setting the SIEBEL_AM_MINRULESCORE System Variable

NOTE: If the Assignee from Rule type is All, Must Assign, then the assignment rule passes even if the minimum score is not satisfied in this case.

Criteria Values

For assignment criteria that use the Compare to Object, Compare to Person, or Compare to Organization comparison method, each criteria also includes one or more values. Criteria values are details associated with criteria that are compared to an object or candidate. Depending on the Inclusion value, candidates that meet the criteria value have the criteria value score added to their total score. Criteria values can be defined as constants or can use wildcard characters to include a wider selection of potential matches between assignment rule and object. For more information, see "Creating Criteria Values" on page 174.

NOTE: Criteria value scores are only calculated for criteria that use the Include inclusion method.

Figure 4 shows a Language Code criteria that uses four languages as criteria values (German, Spanish, Italian, and French). Assuming this assignment rule's minimum score is 10 points, and each language is worth 5 points, candidates for this assignment rule that possess expertise in at least two of these languages qualify for the assignment rule.

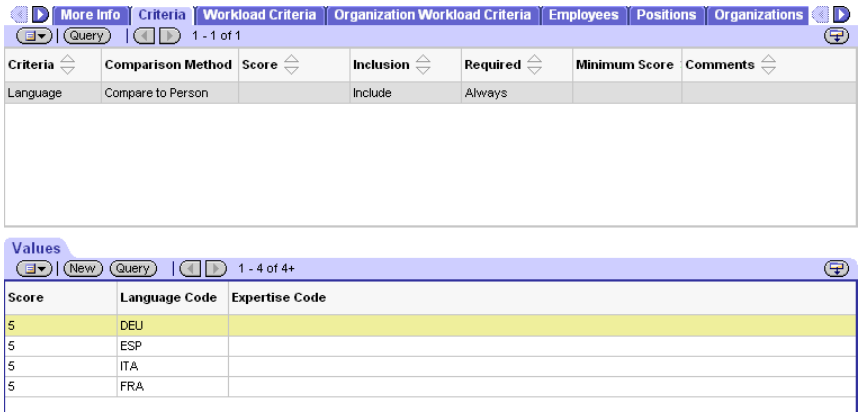

Figure 4. Sample Assignment Criteria Values

Assignment Attributes

Each criteria value can include one or more assignment attributes. Assignment attributes define how the criteria value matches with the following:

- Each assignment object
- Employees, positions, or organizations

Figure 5 shows a Product Line Wildcard assignment criteria that uses the Compare to Person comparison method. The assignment criteria also uses the Include All inclusion method and includes two criteria values. Each criteria value includes two assignment attributes. In this case, only candidates that possess an Expert expertise in monitors and graphic cards qualify for the assignment criteria.

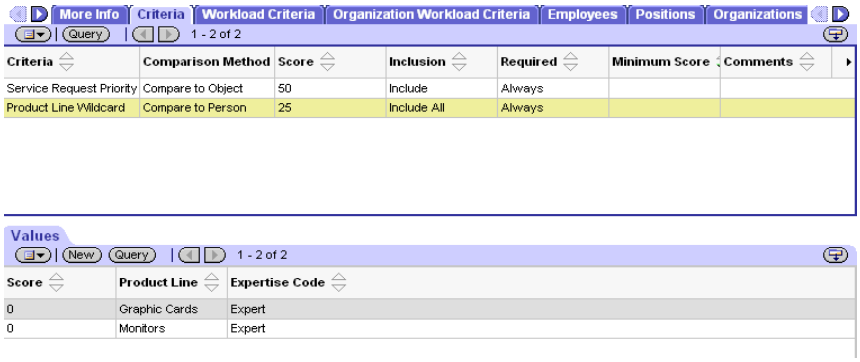

Figure 5. Sample Assignment Attributes

Workload Criteria

The workload criterion is a special criteria type used to balance the load between candidates. You can create workload criteria by adding workload rules in the Assignment Workload view for employees and positions, or the Assignment Organization Workload view for organizations. Workload criteria are generally used with service assignments. You can also define your own workload rules using the Workload Rules view.

NOTE: When creating your own workload rules, keep in mind that performance may be affected if Assignment Manager is accessing a nonindex column, retrieving the total number of records, the All People or the All Organizations flag is checked on the rule, or any combination of the above.

The workload criteria apply a workload score to candidates based on their current workload. The workload score is calculated as follows:

Workload score = Score * (1 – (current workload/maximum workload))

NOTE: The candidate's current workload excludes the workload of the current object being assigned.

Candidates with a lighter workload receive a higher score than candidates with a heavier workload. The workload score is then added to the candidate's score to generate a total score. Candidates that have workloads in excess of the maximum workload are eliminated from the assignment rule. This criteria prevents employees from being overloaded. Multiple workload criteria can be used for each assignment rule.

NOTE: If multiple workload criteria are used, the score is added only if each workload criterion passes; that is, workload criteria function similarly to the logical 'AND' statement.

Figure 6 shows a workload criteria that:

- Adds 100 points to candidates with a workload of 0 items
- Adds 50 points to candidates with a workload of 1 item
- Adds 0 points to candidates with a workload of 2 items
- Eliminates candidates with a workload of more than 2 items if the criteria is marked as Required

For information on defining workload see "Defining Assignment Workload" on page 182.

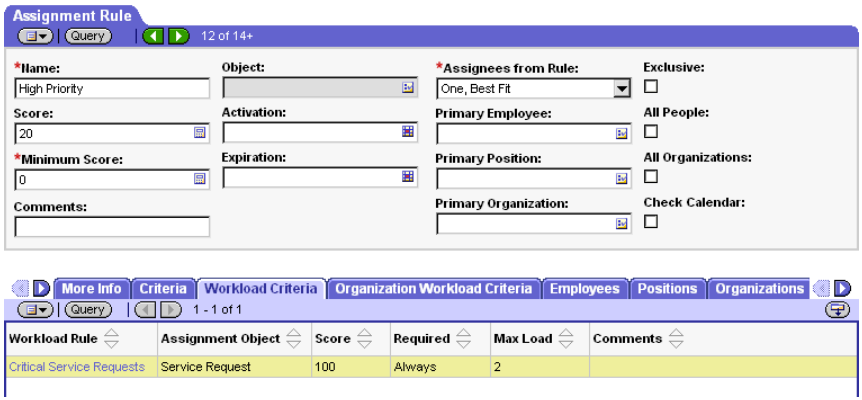

Figure 6. Sample Workload Criteria

Workload criteria can be enabled for multilingual list of values (MLOV) capabilities with additional configuration. MLOV allows workload criteria to be stored in a form that can be retrieved and displayed in a variety of supported client languages. For more details on this feature, see *Siebel Tools Reference*.

Activity-Based Assignment

Assignment Manager can assign emails as email activities created during inbound and outbound email processing. Communications Server (Communications Inbound Manager server component) works in conjunction with Siebel eMail Response and Siebel Workflow to create activities for inbound emails. Communications Server (Communications Outbound Manager server component) creates activities for outbound emails. For more information, see *Siebel eMail Response Administration Guide* (Workflow section) and *Siebel Communications Server Administration Guide*.

NOTE: Setting up assignment rules to assign email activities requires customization in Siebel Tools for Applets, Workflow Policy Object Column, and Assignment Attribute. For related implementation information, see *Siebel Business Process Designer Administration Guide*, *Siebel Communications Server Administration Guide*, and *Siebel Tools Reference*.

Availability-Based Assignment

Assignment Manager has the ability to assign employees based on their calendar availability and can find out whether candidates are working at the required time—and whether their calendar is free or not—before assigning an item to a candidate or team. This feature is used on employee-based assignment objects only, and requires the installation of the Field Service option as it depends on a Field Service component, the Appointment Booking System, to check employee availability. It is, however, not limited to use in the Field Service application and can be used in any application that has employee-based objects. In general, this feature is meant for use with employee-based objects that have an associated time duration, such as Activities and Service Requests.

To use this feature, certain properties of the assignment object require configuration in Siebel Tools. The Activity object is, by default, partially preconfigured for use with availability assignment; the Service Request object, however, is not. Both objects require configuration in Siebel Tools to activate availability-based assignment. See "Configuring Assignment Objects for Availability-Based Assignment" on page 107 for further information on these procedures. Assignment Manager can also be configured to create an Activity in the calendar of the candidate assigned to the object.

After an object is configured for availability-based assignment, an assignment rule activates this feature by means of a check box on the Assignment Rule detail applet. For more information on availability-based assignment, see "Assigning Employees to Assignment Rules Based on Availability" on page 193.

Skills

Skills are assignment criteria values attributed to specific assignment rules, objects, employees, positions, and organizations. Assignment Manager uses skills to match assignment rules, objects, employees, positions, and organizations. By default, sales objects do not use skills. For information about assigning skills to employees, positions, and organizations, see "Assigning Skills to Employees, Positions, and Organizations" on page 68. For information about associating skills to objects, see "Creating Criteria Values as Skills with Expertise Codes" on page 177.

The Siebel application provides predefined skills, however, you can create new skills using Siebel Tools. For information about the predefined skills and creating new skills, see "Creating Skills and Using Skill Tables" on page 141.

You enable and configure skills at the criteria level using Siebel Tools. For more information, see "Assignment Criteria Configuration" on page 117.

After skills are enabled, Assignment Manager matches skills based on the assignment criteria comparison method:

- If a skill uses the Compare to Object criteria, Assignment Manager matches the skill (or object attribute value) specified in the assignment rule to objects that include this skill. Objects that include the specified skill qualify for the assignment rule.
- If a skill uses the Compare Object to Person criteria, Assignment Manager matches objects that include this skill (or object attribute value) specified in the assignment rule to employees or positions that possess this skill. Employees or positions that possess the specified skill qualify for the object.
- If a skill uses the Compare Object to Organization criteria, Assignment Manager matches objects that include this skill (or object attribute value) specified in the assignment rule to organizations that possess this skill. Organizations that possess the specified skill qualify for the object.

- If a skill uses the Compare to Person criteria, Assignment Manager matches the skill (or object attribute value) specified in the assignment rule to employees or positions that possess this skill. Employees or positions that possess the specified skill qualify for the assignment rule.
- If a skill uses the Compare to Organization criteria, Assignment Manager matches the skill (or object attribute value) specified in the assignment rule to organizations that possess this skill. Organizations that possess the specified skill qualify for the assignment rule.

In each of these cases, Assignment Manager applies scores and other filters to find the best candidate after a match has been made. For more information about assignment criteria comparison methods, see "Assignment Criteria" on page 32. For information about assigning skills to employees, positions, and organizations, see "Assigning Skills to Employees, Positions, and Organizations" on page 68.

Expertise Codes

Assignment Manager uses expertise codes to rank skills to find the most suitable candidate. For example, you do not want to assign a novice to a service request that requires an expert. Using expertise codes allows you to prevent assigning objects to underqualified candidates.

Expertise codes are predefined for the following skill types (or assignment criteria):

- Language Code
- Product
- Product Line
- Product Line Wildcard
- Product Wildcard

The three predefined expertise codes are Novice, Intermediate, and Expert. Expertise codes are stored in—and can be modified, added to, or deleted from—the List of Values Administration view. For procedures, see "Creating Expertise Codes" on page 178. Expertise codes apply only to skills and are global; after they are defined, assignment criteria share the same set of expertise codes.

After you select an expertise code for a skill, Assignment Manager matches assignment rules based on the assignment criteria comparison method. If the expertise code belongs to a skill that uses the:

- **Compare to Object criteria**. The assignment rule passes if the skill's expertise code is equal to, or higher than, the object's expertise code.
- **Compare Object to Person criteria**. The assignment rule passes if the candidate's expertise code is equal to, or higher than, the object's expertise code.
- **Compare to Person criteria**. The assignment rule passes if the candidate's expertise code is equal to, or higher than, the skill's expertise code.

For more information on assignment criteria comparison methods, see "Assignment Criteria" on page 32.

Weighting Factors

Optionally, you can apply weighting factors to expertise codes. While you can use expertise codes to eliminate underqualified candidates, using weighted expertise codes allows you to weigh skill scores to find the most suitable candidate by further eliminating overqualified candidates. For example, you may not want to assign an expert to a service request that can be handled by a novice.

Using weighted expertise codes allows you to prevent assigning objects to overqualified candidates by applying a weight to the skill score. Each expertise code has a defined value, which is its weighting factor. The expertise code with the highest defined weighting factor represents the maximum weighting factor (Max Weighting Factor).

The weighting applied to a skill or criteria score is the percentage defined by an expertise code's weighting factor over the maximum weighting factor, see Table 9 on page 49 for an example.

Weighting factors are only applied if the expertise code is defined for both the skill items and the object attributes. If the expertise is not defined for both, the weighting factors are ignored. Weighting factors are also calculated differently for candidates and organizations based on the comparison method chosen for the assignment rule.

- For the Compare to Person, Compare to Object, and Compare to Organization comparison methods, the weighted score is determined as follows:

  Score = Criteria Score + Skill Score*(Weighting Factor/Max Weighting Factor)

- For the Compare Object to Person and Compare Object to Organization comparison methods, as neither of these comparison methods can define skill scores, the weighted score is determined as follows:

  Score = Criteria Score*(Weighting Factor/Max Weighting Factor)

Assignment Manager applies the weighted skill scores and other scores to find the most suitable candidate when a match is made.

Weighting factors for expertise codes are stored in—and can be modified, added to, or deleted from—the List of Values Administration view. For procedures, see "Defining Weighting Factors" on page 179. Weighting factors for expertise codes apply only to skills and are global; after they are defined, assignment criteria share the same set of weighting factors for expertise codes.

Weighting factors weigh expertise codes by applying a specified percentage to the skill score. Table 9 shows sample weighting factors that can be used for the three types of predefined expertise codes.

Table 9. Sample Weighting Factors for Expertise Codes

Expertise Code	Weighting Factor	Percentage of Skill Score
Novice	2	If skill is matched, adds 40% of score for the skill (or criteria value)
Intermediate	5	If skill is matched, adds 100% of score for the skill (or criteria value)
Expert	3	If skill is matched, adds 60% of score for the skill (or criteria value)

In this example, candidates with an intermediate expertise for the matched skill are favored over other candidates, because they receive 100% of the skill score. This may be desired if your organization has many more service representatives with an intermediate expertise than service representatives with an expert expertise. In this case, you make sure that service requests that require only an intermediate expertise are assigned to service representatives with an intermediate expertise.

Assignment Logic and Scoring

This section explains the scoring scheme and assignment methodology used by Siebel Assignment Manager to assign candidates to objects.

Assignment Scoring

Siebel Assignment Manager determines which candidates are assigned to objects by applying scores to potential candidates. Assignment Manager then ranks the candidates based on their scores and selects assignees based on the Assignees from Rule type.

Assignment Manager applies scores to candidates from each assignment rule for:

- Assignment rule
- Assignment criteria
- Assignment criteria values (only for criteria that use the Include inclusion method)
- Workload criteria
- Employee score
- Position score
- Organization score

Assignment Manager adds the values of each score to apply a total score for each candidate. Before implementing Assignment Manager, you should carefully consider the value for each score, and assign higher scores to more important attributes.

Assignment Manager can also be configured to save the scores of candidates who are assigned to an assignment object. The scores of each candidate are stored in the appropriate team table. Team member scores are written independently for each type of candidate (employees, positions, and organizations). Saved candidate scores can be accessed by other Siebel application modules and used to produce items such as analysis reports for employee utilization. The scores can also be exposed to users for review and sorting. See "Configuring Assignment Objects for Team Scoring" on page 114 for information on configuring this feature.

Multitiered Assignment

By default, Assignment Manager independently matches people and organizations to assignment objects. Activating Assignment Manager to use multitiered assignment, however, allows assignments based on the relationship between a person and their organization or an organization and its people. Without multitiered assignment—or appropriate assignment rules—it is possible for Assignment Manager to assign an unrelated organization or person to an assignment object. Multitiered assignment has the following modes of assignment operation:

- Independent—Assigns people and organizations that qualify, regardless of whether they are related or not.
- Person-Oriented—Assigns people that qualify, then assigns only qualified organizations that the assigned people belong to.
- Organization-Oriented—Assigns organizations that qualify, then assigns qualified people from those organizations.
- Organization and Person-Oriented—Identifies qualified people and organizations, then assigns only those that have both a qualified person and related qualified organization.

NOTE: Use caution when the Organization and Person-Oriented mode is used with assignment rules that use the Assignees from Rule selection One, Best Fit. Inconsistencies can occur. The One, Best Fit Assignees from Rule assigns only the highest scoring position or organization. If the highest scoring position does not have a qualifying organization, or if the highest scoring organization does not have a qualifying position, the object remains unassigned, even if a lower scoring position and its related organization both qualify for the assignment rule.

This logical assignment feature is well-suited to Sales organizations. Assignment objects must be configured to activate multitiered assignment. For more information, see "Configuring Assignment Objects for Multitiered Assignment" on page 112. For more information and examples of multitiered assignment, see, "Using Multitiered Assignment with Sales Assignment Rules" on page 78.

Assignment Methodology

Siebel Assignment Manager uses the following methodology to assign candidates to assignment objects.

1 **Find assignment rules for the object.** Find active assignment rules to be evaluated for the object being assigned. If an assignment rule does not include any assigned objects, then the assignment rule is evaluated for all objects. Objects should be assigned to assignment rules in the Object field of the Assignment Rules view.

NOTE: When an assignment object has multiple rules, rules are evaluated randomly.

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2 **Evaluate assignment criteria for the object.** Evaluate each criteria that uses the Compare to Object comparison method to find assignment rules that satisfy the object's attributes.

NOTE: If criteria marked as Required do not satisfy the object's attributes, then Assignment Manager stops evaluating the assignment rule.

---

3 **Determine a list of candidates from each assignment rule.** For each assignment rule that satisfies Step 2, determine a list of candidates relevant to the assignment rule:

- If the object uses position-based assignment, then the candidate list includes the positions registered in the Assignment Positions view.
- If the object uses employee-based assignment, then the candidate list includes the employees registered in the Assignment Employees view.
- If the object uses organization-based assignment, then the candidate list includes the organizations registered in the Assignment Organizations view.
- If the All People field is checked in the Assignment Rules view, then the candidate list includes registered employees or positions in the Siebel database.

- If the All Organization field is checked in the Assignment Rules view, then the candidate list includes registered organizations in the Siebel database.

Candidates pass for assignment unless a required rule fails or there is no relevant attribute.

NOTE: If no rules pass, then Assignment Manager assigns the object row to either the default employee or default position, depending on rules that are associated with the assignment object. For example, a service request is assigned to Default Employee, whereas an opportunity is assigned to Default Position. If the assignment object is configured for assignment to an organization and no rules pass, Assignment Manager assigns Default Organization. For more information, see Appendix A, "Assignment Object Parameters."

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4 **Evaluate each candidate against assignment rule criteria.** Evaluate each candidate against the criteria using the selected comparison method as described in the following table:

Comparison Method	Description
Compare Object to Person	Remove candidates that do not satisfy required object attributes when using this comparison method. These criteria make sure that qualified candidates possess the required skills for this object.
Compare to Person	Remove candidates that do not satisfy required criteria values when using this comparison method. These criteria make sure that only qualified candidates with the required skills are evaluated for this assignment rule.
Compare Object to Organization	Remove organizations that do not satisfy required object attributes when using this comparison method. These criteria make sure that qualified organizations possess the required skills for this object.
Compare to Organization	Remove organizations that do not satisfy required criteria values when using this comparison method. These criteria make sure that only qualified organizations with the required skills are evaluated for this assignment rule.
Workload	Remove candidates that have a workload greater than the maximum workload specified in the Assignment Workload view (only if the criteria is marked as Required).

NOTE: Candidates fail if they do not match the criteria or if they fail to meet the minimum score required for the criteria. Candidates that fail criteria marked as Required are not evaluated further against this rule.

5 **Score each qualified candidate for each assignment rule.** Scoring of each candidate for an assignment rule is based on the sum of:

- Assignment rule score
- Score of each assignment criterion that is satisfied

- Each assignment criterion value that is satisfied

  Some assignment criteria values (skills) are weighted by expertise.

  - To rank expertise codes, use the Order field in the List of Values view. For procedures, see "Creating Expertise Codes" on page 178.
  - To define expertise weight, use the Weighting Factor field in the List of Values view. For procedures, see "Defining Weighting Factors" on page 179.

  For more information on skills, see "Skills" on page 46. For more information on expertise, see "Expertise Codes" on page 47. For more information on weighting factors, see "Weighting Factors" on page 48.

  NOTE: Criteria value scores are calculated only for criteria that use the Include inclusion method.

- Score for the candidate

  This value is specified in the Assignment Employees view, Assignment Positions view, or Assignment Organizations view.

- Workload score

  Prorated score based on the current workload of candidates compared to the maximum workload allowed. The workload score is calculated as:

  - Workload Score = Score * (1 – (current workload/maximum workload))

  For more information, see "Workload Criteria" on page 43.

If the Assignment Rule form has the Check Calendar box selected, Assignment Manager uses the availability-based assignment feature to submit employee availability information to the Field Service Appointment Book component, which reviews qualified candidates' calendars and work schedules to see who is available to undertake the assignment at the required time. See "Availability-Based Assignment" on page 45 for further information on this feature.

6 **Apply the Assignees from Rule method to scored candidates to generate a list of potential assignees.** Use the Assignees from Rule type to eliminate candidates and determine a final list of assignees. The following table describes the types of assignment rules.

Assignees from Rule	Description
All, Above Minimum	Use assignees with an assignment score greater than or equal to the assignment rule's minimum score.
All, Must Assign	Same as All, Above Minimum, except that the highest-scoring candidate is a potential assignee even if all candidates fail to meet the minimum score.
One, Best Fit	Use the assignee with the highest assignment score from this assignment rule.
One, Random	Choose a random assignee whose score is greater than or equal to the minimum score required for this assignment rule.

7 **Determine the primary assignment rule.** If an exclusive assignment rule does not exist, then the primary assignment rule is the assignment rule with the highest-scoring assignee. If all assignment rules do not have a score, then the assignment rule with the lowest row ID is selected.

8 **Evaluate exclusive assignment rules.** If at least one assignment rule marked as Exclusive has candidates that satisfy Step 6, then find the exclusive assignment rule with the highest-scoring assignee. Keep all assignees in this assignment rule and eliminate other assignees.

If more than one exclusive assignment rule yields the same highest score, then assign the object to:

- The default employee for employee-based assignments
- The default position for position-based assignments

- The default organization for organization-based assignments

NOTE: When two or more exclusive assignment rules have the same score and the Keep Man Asgn Primary Position assignment property is set to TRUE, then the manually assigned primary position is retained and the default position is added to the team as a nonprimary.

9 **Determine the primary assignee.** Determine the primary assignee from the primary assignment rule:

- For objects that use employee-based assignments, set the primary assignee to the primary employee selected in the Primary Employee field of the Assignment Rule form applet for the primary assignment rule. If the selected primary employee is not an assignee that satisfies Step 6 on page 57, then select the highest-scoring employee for the primary assignment rule that satisfies Step 6 on page 57.
- For objects that use position-based assignment, set the primary assignee to the primary position selected in the Primary Position field of the Assignment Rule form applet for the primary assignment rule. If the selected primary position is not an assignee that satisfies Step 6 on page 57, then select the highest-scoring position for the primary assignment rule that satisfies Step 6 on page 57.
- For objects that use organization-based assignments, set the primary organization to the primary organization selected in the Primary Organization field of the Assignment Rule form applet for the primary assignment rule. If the selected primary organization is not an assignee that satisfies Step 6 on page 57, then select the highest-scoring organization for the primary assignment rule that satisfies Step 6 on page 57.

NOTE: The primary employee, position, or organization must pass the minimum score required for this assignment rule to be assigned as the primary assignee. The only exception is when the Assignee from Rule type is All, Must Assign, in which case the highest-scoring candidate or organization is a potential assignee if all candidates fail to meet the minimum score. For more information about Assignee from Rule types, see Table 4 on page 24.

10 **Filter out certain assignees based on multitiered mode.** By default, the assignment mode is set to independently assign qualifying people and organizations. Three other assignment modes are available, which allows filtering of unwanted, but qualifying, people and organizations based on the relationship that exists between them. See "Multitiered Assignment" on page 52 for further information.

11 **Generate assignments.** Write assignees to the object table:

- Write the primary assignment rule and primary assignee to the object's primary table.
- For team-based objects, write assignees to the object's team table.

NOTE: For interactive assignments, generated assignees can be assigned manually in the Assign Employees view.

Assignment Operation Modes

This section explains the assignment modes available for running Assignment Manager:

- Interactive
- Dynamic
- Batch
- Mobile
- Contact Denormalization
- Product Denormalization

Assignment modes are established using the Server Administration views or the command-line interface. For more information, see Chapter 5, "Running Assignment Manager."

Interactive Assignment

Running Assignment Manager in interactive mode allows users to make real-time assignments.

NOTE: Mobile users running Assignment Manager in interactive mode do not make real-time assignments, because interactive assignments made by mobile users are not applied to the server until they resynchronize.

By clicking the Menu button on any selected object and choosing Assign, Interactive Assignment allows you to view the list of assignees generated by Assignment Manager. You can then override the assignment and select another assignee from the list in real time.

Dynamic Assignment

Dynamic Assignment allows users to create assignments as other users and server programs change assignment object attributes. For example, if a user changes the revenue amount or address of an Opportunity, Dynamic Assignment detects the change and automatically invokes Assignment Manager to reassign the Opportunity to a different territory or sales team as necessary.

The dynamic assignment process is as follows: a user makes a change that requires assignment; a database trigger fires (triggers are setup by the Generate Triggers server component); the Workflow Monitor Agent recognizes this trigger and assigns the object (internally invoking Assignment Manager). By default, the Server Request Broker and the Assignment Manager server components are not explicitly used in Dynamic Assignment.

Workflow Monitor

To run Dynamic Assignment, a Workflow Monitor Agent must be active. A Workflow Monitor Agent detects when a user changes data related to objects. For more information about Workflow Monitor Agent, see *Siebel Business Process Designer Administration Guide.*

Generate Triggers

The Generate Triggers server component generates the database triggers used by Workflow Manager to detect changes. Generate Triggers reads the Workflow Policy Object and Assignment Object definitions in the Siebel repository and generates the appropriate database triggers to monitor changes.

Batch Assignment

You can use Batch Assignment to assign multiple records of an object in a single batch. For example, after changing assignment rule definitions, you can use Batch Assignment to reassign objects using the new assignment rules. Batch Assignment is optimized to process a large number of items efficiently. You should monitor the performance of Batch Assignment and increase or decrease the number of running tasks to obtain the optimal performance.

You can set up Batch Assignment to run Assignment Manager in Contact Denormalization mode. For more information on Contact Denormalization, see "Contact Denormalization" on page 63.

Mobile Assignment

Mobile Assignment allows mobile users to make interactive and dynamic assignments. Changes to the mobile client's database are queued and are applied to the server the next time the client synchronizes.

Assignment Manager automatically performs interactive assignments made by the mobile user after synchronization. Changes to assignment rules and objects are updated, and affected objects are reassigned dynamically.

NOTE: Mobile users running Assignment Manager in interactive mode do not make real-time assignments, because interactive assignments made by mobile users are not applied to the server until they resynchronize.

Contact Denormalization

In Contact Denormalization mode, Assignment Manager denormalizes positions from the Accounts and Opportunities team tables by copying these positions to the associated contacts in the Contact team table, even if the assignees are not assigned to the contacts:

- Positions from the Accounts team table are copied to the Account Contact access list.
- Positions from the Opportunity team table are copied to the Opportunity Contact access list.

If you want the Contact access list to reflect the positions in both the Account and Opportunity team tables, you must associate the contact with an account and then associate the contact with an opportunity. If a team member is removed from the Account or Opportunity's team table, then the position on the associated Contact's access list can also be removed by Contact Denormalization (dependent on the properties of the Contact Denormalization assignment object. For more information, see "Contact Denormalization Object Parameters" on page 315.) Similarly, if the Account Team has manually assigned team members and you want the same team members on both the access list and Account team, you must run Contact Denormalization after the account assignment. This process can be run in dynamic and batch assignment modes.

NOTE: Positions marked Indirect by Contact Denormalization in Contact Access list are not dropped by contact assignment, that is, contact assignment does not drop the positions that were added by Contact Denormalization.

Contact Denormalization checks the Lock Assignment column on assignment objects before denormalizing. If this flag is checked, Contact Denormalization does not denormalize the contact record. For more information about the Lock Assignment feature, see the usage comments for the Lock Assignment Column run-time parameter in Table 38 on page 276.

NOTE: Both Account and Contact and Contact and Opportunity have a many-to-many relationship. The Account and Contact many-to-many relationship is a new feature as of the version 7.0 release.

Assignment Manager also assigns a primary position to the contact when running in Contact Denormalization mode using the following methodology:

1. If the Set Primary Position flag is checked and a primary position is not currently selected, then Assignment Manager sets the creator's primary position as the new primary position.
2. If a primary position is not selected for the creator, then Assignment Manager sets the default position as the new primary position.
3. If a default position is not defined, then Assignment Manager does not set a primary position.

However, Contact Denormalization does not remove positions marked as the Primary, even if the positions no longer exist on an associated account or opportunity (with the Denorm Flag set).

The Contact Denormalization object is reserved to run Assignment Manager in Contact Denormalization mode. Assignment Manager does not evaluate the Contact object against any assignment rules in Contact Denormalization mode, and therefore does not assign candidates to objects. For this reason, do not create assignment rules for the Contact Denormalization object. By default, Assignment Manager runs Dynamic Assignment in Contact Denormalization mode. You can also configure Assignment Manager to run Batch Assignment in this mode.

For more information about Contact Denormalization, see Chapter 5, "Running Assignment Manager," and "Activating Contact Denormalization" on page 232.

Product Denormalization

In Product Denormalization mode, Assignment Manager denormalizes organizations from the Price List table into the Product table by copying these organizations to the products associated with the price lists.

NOTE: Product to Price List is a many-to-many relationship.

Assignment Manager also assigns a primary organization to the product when running in denormalization mode using the following methodology:

1. If the Set Primary Organization flag is checked and a primary organization is not currently selected, then Assignment Manager sets the creator's primary organization as the new primary organization.
2. If a primary organization is not selected for the creator, then Assignment Manager sets the default organization as the new primary organization.
3. If a default organization is not defined, then Assignment Manager does not set a primary organization.

The Product Denormalization object is reserved to run Assignment Manager in Product Denormalization mode. Assignment Manager does not evaluate the Product object against any assignment rules in Product Denormalization mode, and therefore does not assign organizations to objects. For this reason, do not create assignment rules for the Product Denormalization object. Additionally, you should run Product Denormalization only in batch mode. For more information about running Batch Assignment, see "Running Assignment Manager in Batch Mode" on page 236.

2 Assignment Strategy

To use Assignment Manager for your organization, you must develop and document a clear set of strategies that can be consistently applied by Assignment Manager or system administrators.

For each assignment object, you should consider how to develop assignment rules that:

- Optimally match the attributes of assignment objects to criteria values of the assignment rules. This is commonly used for traditional territory assignment where territories are managed exclusively through assignment administration. Employees, positions, or organizations associated with these rules are potential assignees. Sales organizations typically use this method.
- Optimally match the attributes of assignment objects to employee skills. Expertise is managed using employee, position, or organization skills. Service organizations typically use this method.
- Reflect a blend of the attributes outlined in the two methods described above. For example, sales organizations can benefit from assignment rules using employee skills as well as territory rules.

This chapter discusses common strategies that you can use to develop effective assignment rules in sales and service organizations.

Assigning Skills to Employees, Positions, and Organizations

You use skills to find the best matching candidates to assign to certain projects, service requests, and so on. Skills can be associated with individual employees, positions, or organizations. During the assignment process, Assignment Manager tries to find candidates that have the relevant skills for assignment to a particular item. For example, a service request requiring an agent who has expertise for a particular product is routed to someone who has that product expertise as a part of their skillset. For more information about how skills are applied, see "Skills" on page 46, and "Creating Criteria Values as Skills with Expertise Codes" on page 177. For more information about creating skills, see "Creating Skills and Using Skill Tables" on page 141.

You can enable and configure skills at the criteria level by using Siebel Tools. For more information, see "Assignment Criteria Configuration" on page 117.

To associate skills with a position

1. From the application-level menu, choose View > Site Map > Group Administration > Positions.
2. In the Positions list, select the position for which you want to associate skills.
3. Click the Assignment Skills view tab.
4. In the Assignment Skills list, add a new record.
5. From the Item field drop-down list, select a skill.
6. In the Position Skill Items list, add a new record and complete the necessary fields.

   The columns that display in the Position Skill Items list depend on the skill chosen from the drop-down list in the Assignment Skills list.

To associate skills with an organization

1. From the application-level menu, choose View > Site Map > Group Administration > Organizations.

2 In the Organizations list, select the organization for which you want to associate skills.

3 Click the Assignment Skills view tab.

4 In the Assignment Skills list, add a new record.

5 In the Item field, select a skill from the drop-down list.

6 In the Organization Skill Items list, add a new record and complete the necessary fields.

   The columns that display in the Organization Skill Items list depend on the skill chosen from the drop-down list in the Assignment Skills list.

To associate skills with an employee

1 From the application-level menu, choose View > Site Map > User Administration > Employees.

2 In the Employees list, select the employee for whom you want to define skills.

3 Click the Assignment Skills view tab.

4 In the Assignment Skills list, add a new record.

5 In the Skill field, select a skill from the drop-down list.

6 In the Employee Skill Items list, add a new record and complete the necessary fields.

   The columns that display in the Employee Skill Items list depend on the skill chosen from the drop-down list in the Assignment Skills list.

NOTE: Employees can also track and update their own skill profiles in the User Preferences Profile view (View > User Preferences > Profile > Employee Skills).

Assignment in Sales Organizations

Sales organizations typically need to distribute opportunities and accounts to the proper people within the organization. Assignment of sales opportunities must take place quickly so that sales representatives can respond to potential revenue-generating opportunities. Information must also be readily available to salespeople to close the maximum number of sales possible.

Assignments in sales organizations are commonly made to positions responsible for a territory. Mobile salespeople who are not connected to a network can share information and work as a collaborative sales force on sales opportunities. Sales organizations can therefore use the talents of their salespeople within their entire organization.

Siebel Assignment Manager allows you to create territories for positions using a wide variety of criteria. By assigning objects to positions, you can have one sales representative inherit the opportunities, accounts, and contacts from another sales representative by reassigning the employee responsible for a specific position.

After you have created the territories using assignment criteria, a major territory realignment can negatively affect your system resources. If the realignment is large, Assignment Manager may create a volume of transactions for mobile clients, which increases synchronization time drastically. To avoid this, you can run Database Extract again and have the mobile clients initialize their databases. Because the time required to run Database Extract for multiple clients may be significant, try to coordinate territory realignments with Database Extracts to occur during a time of low system utilization.

Because sales organizations typically distribute their accounts and opportunities based on territories, create assignment rules based on these territories. Assignment Manager includes two additional views, Territory List view and Territory Detail view, originally designed for sales organizations. However, these views function exactly as the Assignment Rule view and Assignment Criteria view respectively. The Territory List view has been simplified to allow users to define their sales territories. For this reason, some of the assignment options covered in this chapter do not appear in the Territory List view.

To illustrate how Assignment Manager can be used in a sales organization, this section uses two related examples to show how you can strategically distribute salespeople by using assignment rules based on territories and a third scenario that examines multitiered assignment in various modes.

NOTE: The Territory List and Detail views will eventually be phased out from the Assignment Administration screens. If your configuration currently uses these views, note that they can migrate to the existing Assignment Rule views with no loss of functionality or data. For further information, contact Siebel Technical Support.

Creating Sales Assignment Rules Based on Territories

This section uses an example to demonstrate how a sales organization can strategically assign salespeople based on territories. This example assumes that your sales organization wants to create four territories based on geographic location. In this case, you may want to create four assignment rules: US NW, US NE, US SE, and US SW, as shown in Figure 7. Assignment Manager then assigns your salespeople depending on the geographic location of the sales opportunity.

NOTE: For detailed instructions on performing each step, see Chapter 4, "Assignment Rules."

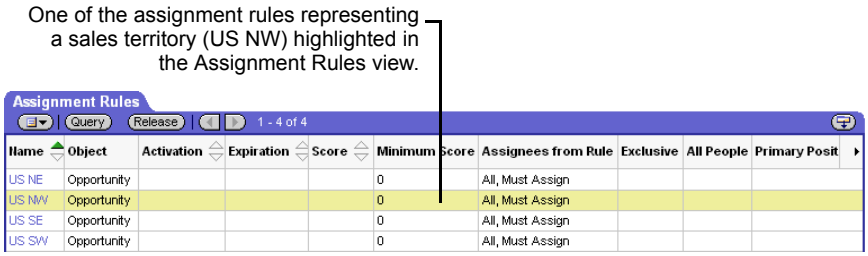


Figure 7. Example of Creating Sales Territories

To develop assignment rules based on territories

1. Create assignment rules as sales territories.

   In this example, in the Assignment Rule view you create four assignment rules, one for each territory as shown in Figure 7.

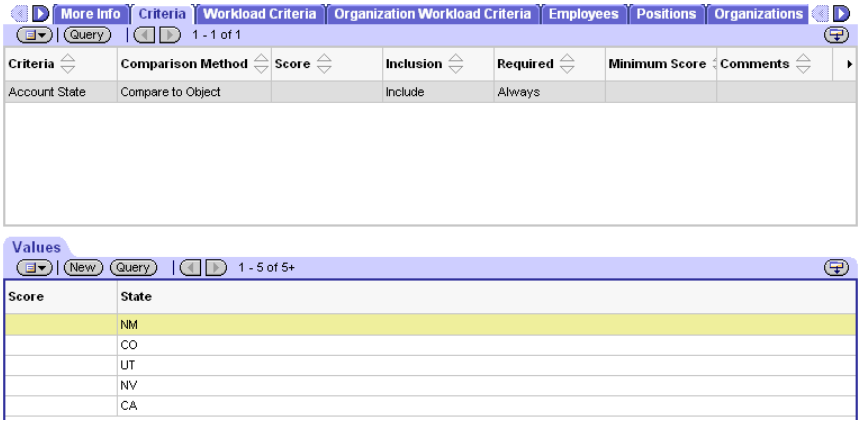
2. Determine the assignment criteria.

   In this example, in the Assignment Criteria view, you define Account State as the criteria for each assignment rule, because the assignment rules are based on territories.

3 Define the criteria values.

In this example, in the Assignment Criteria view, you use the states that make up each territory as criteria values.

The following figure shows an example of defining a sales territory using assignment criteria and values as described in Step 2 and Step 3.



4 Add the Positions.

In the Assignment Positions view, add the sales positions responsible for each territory. As an example, you add Division Manager - West and Field Sales Representative to the US NW assignment rule.

NOTE: To specify a primary position, you must set the primary at the rule level (in the Primary Position field in the Assignment Rule view) and also assign a specific position within that rule (Assignment Rules > Positions). For more information on the primary position, see "Creating Assignment Rules" on page 161. For more information about assigning positions, see "Adding Positions to Assignment Rules" on page 195.

---

5 Release the assignment rules.

   In the Assignment Rules view, click the Release button. You can then run Batch Assignment to assign objects affected by the assignment rules. For more information about running Batch Assignment, see "Running Assignment Manager in Batch Mode" on page 236.

After these assignment rules are released, Assignment Manager assigns salespeople based on the geographic location of the sales opportunity. For example, a sales opportunity in California is assigned to a Western Field Sales Representative.

NOTE: After an Account or Opportunity has been assigned to a Sales Team, the list of Territory definitions used by Assignment Manager for this item is added to the item record in the Territories field. This list is not modifiable in the standard user Account or Opportunity detail views. If manual changes are made to the Sales Team over time and the Territory list needs to be updated to match the changes, then use the Accounts view under the Data Administration screen to make the updates.

Creating Sales Assignment Rules That Combine Criteria

The example in this section assumes that your sales organization now wants to further distribute its salespeople in the same geographic location based on revenue potential. In this case, you can create territories that use the same geographic location but different revenue potentials. In this example, you may want to create two assignment rules: US SW High Revenue and US SW Low Revenue as shown in Figure 8. Assignment Manager then assigns your salespeople, depending on both the geographic location and the revenue potential of the sales opportunity.

NOTE: For detailed instructions on performing each step, see Chapter 4, "Assignment Rules."

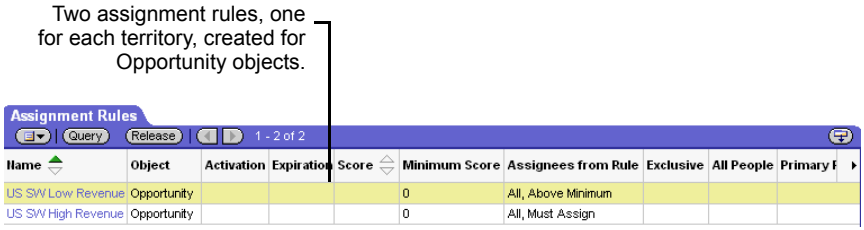


Figure 8. Example of Creating Assignment Rules with Combined Criteria

To develop assignment rules that combine criteria

1. Create assignment rules.

   In this example, create two assignment rules, one for each territory, as shown in Figure 8.

2. Determine the assignment criteria.

   In this example, select Account State and Revenue as the criteria.

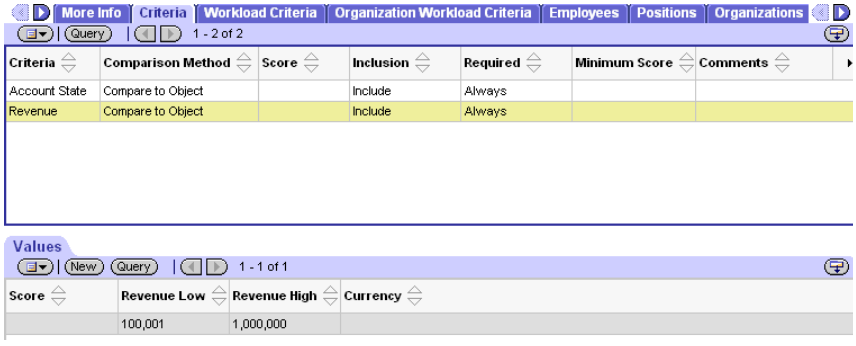
3 Define the criteria values.

In this example, use the states that make up each territory as the Account States criteria values. For the Revenue criteria values, select different assignment attributes for each assignment rule:

- For the US SW High Revenue Assignment Rule, type `100,001` in the Revenue Low assignment attribute.
- For the US SW Low Revenue Assignment Rule, type `100,000` in the Revenue High assignment attribute.

NOTE: The columns that appear in the Values list applet change dynamically depending on the criteria selected in the Criteria list applet.

The following figure shows an example of defining the US SW High Revenue assignment rule as described.



4 Add the positions for this assignment rule.

In this example, you add a different sales position for each assignment rule:

- For the US SW High Revenue assignment rule, add Division Manager - West.

- For the US SW Low Revenue assignment rule, add Western Field Sales Representative.

The figure shown in Step 3 shows an example of defining the US SW High Revenue assignment rule as described.

5 Release the assignment rules.

In the Assignment Rules view, click the Release button. You may then run Batch Assignment to assign objects affected by the assignment rules. For more information about running Batch Assignment, see "Running Assignment Manager in Batch Mode" on page 236.

After these assignment rules are released, Assignment Manager assigns salespeople based on the geographic location and revenue potential of the sales opportunity. For example, a sales opportunity in Nevada with a revenue potential of over $100,000 is assigned to the western division manager. However, a sales opportunity in New Mexico with a revenue potential of $100,000 or lower is assigned to a western field sales representative.

Using Multitiered Assignment with Sales Assignment Rules

Multitiered assignment is a logical assignment feature that considers the relationships between people and organizations before assigning an object. Multitiered assignment functions in various modes; see "Multitiered Assignment" on page 52 for more information on multitiered assignment and its assignment modes. Multitiered assignment must also be configured for assignment objects. For more information on this process, see "Configuring Assignment Objects for Multitiered Assignment" on page 112. The following scenarios show how multitiered assignment functions in various modes. Each scenario is based on the same sales opportunity and the same assignment rules.

Independent Assignment. If multitiered assignment is disabled, Assignment Manager assigns the object independently, resulting in the following scenario:

- All people and organizations not matching assignment rule criteria are filtered out.
- For each person that matches, assign that person to the object.
- For each organization that matches, assign it to the object.
- The European and Asian Sales Representatives independently are assigned to the same opportunity as well as the Europe and North America organizations, as shown in the following table:

Person	Match	Organization	Match	Assigned Person	Assigned Organization
European Sales Representative	Y	Europe	Y	European Sales Representative	Europe
North American Sales Representative	N	North America	Y		North America
Asian Sales Representative	Y	Asia	N	Asian Sales Representative	

Person-Oriented Assignment. If multitiered assignment is set to person-oriented mode the following situation occurs:

- All organizations and people not matching assignment rule criteria are filtered out.
- For each person that matches, assign that person to the object.
- Evaluate organization candidates for the assigned people's organizations. If the organization matches, assign that organization to the object.
- The European and Asian Sales Representatives are assigned, but only the Europe organization is assigned, as shown in the following table:

Person	Match	Organization	Match	Assigned Person	Assigned Organization
European Sales Representative	Y	Europe	Y	European Sales Representative	Europe
North American Sales Representative	N	North America	Y		
Asian Sales Representative	Y	Asia	N	Asian Sales Representative	

Organization-Oriented Assignment. If multitiered assignment is set to organization-oriented mode the following situation occurs:

- All organizations and people not matching the assignment rule criteria are filtered out.
- For each organization that matches, assign it to the object.
- Evaluate each person candidate for the assigned organization's people. If a person matches, assign that person to the object.

- The Europe and North America organization are assigned, but only the "European Sales Representative" is assigned, as shown in the following table:

Person	Match	Organization	Match	Assigned Person	Assigned Organization
European Sales Representative	Y	Europe	Y	European Sales Representative	Europe
North American Sales Representative	N	North America	Y		North America
Asian Sales Representative	Y	Asia	N		

Organization and Person-Oriented Assignment. If multitiered assignment is set to organization and person-oriented mode, the following situation occurs:

- All organizations and people not matching the assignment rule criteria are filtered out.
- For people and organizations that satisfy the assignment rule criteria, assign only those that have both a corresponding organization and person that meet the criteria (similar to a logical AND statement).
- Only the European Sales Representative and the Europe organization are assigned, as shown in the following table:

Person	Match	Organization	Match	Assigned Person	Assigned Organization
European Sales Representative	Y	Europe	Y	European Sales Representative	Europe
North American Sales Representative	N	North America	Y		
Asian Sales Representative	Y	Asia	N		

Assignment in Service Organizations

In a service organization, service requests can often be resolved by the first customer service representative (CSR) who services the customer. However, when the request cannot be resolved, or when the service request is logged through the Internet, ownership must be transferred to a service representative who possesses the expertise to handle the request.

In this environment, it becomes critical to assign employees with the proper expertise and skills to service requests. Therefore, you should assign employees to objects because some employees possess specific skills that are different from those of other CSRs or field service engineers. When service representatives are on vacation, are promoted, or assume different responsibilities, work assigned to these employees must be reassigned based on the skills and workloads of other employees in the service organization.

NOTE: A quick-start method is available if you plan to assign service requests using the same assignment rule. To use this method, skip to Step 4 on page 82 in the following procedure.

To develop effective assignment rules for your customer service organization

1 Determine the different assignment objects that need to be assigned.

   Service organizations need to assign ownership of a wide variety of tasks. These tasks may include service requests, activities, and accounts. In addition, a product development organization may need to assign ownership of product defects to engineers. For instance, you may decide to assign only service requests and product defects, because the associated activities are manually assigned by owners of those objects.

2 Determine if multiple assignment objects are assigned using the same assignment rules.

   Multiple assignment objects can be assigned using the same assignment rules. For example, if you are assigning accounts and service requests in the same manner, you can use the same assignment rules by associating those rules with multiple assignment objects.

3 For each assignment object, determine which of the objects is assigned using the same assignment rules.

   The Compare to Object comparison method allows you to assign different groups of objects using different rules. Typically, complex service environments assign different groups of service requests using different rules, such as segmenting the service requests based on service request priority.

4 Determine the strategy for each group of objects to be assigned using the same assignment rules.

   Use the skill criteria to minimize the number of assignment rules. One assignment rule can match different candidates to various objects based on the object characteristics and candidate skills. To determine optimal assignment, determine the criteria that you wish to evaluate for each candidate to make sure that the candidate possesses the proper skills to handle the task. This is the primary type of criteria you use most frequently for implementing assignments in a customer service environment. These criteria are defined using the Compare Object to Person comparison method in the Assignment Criteria view.

5 Define workload rules.

   Determine the various methods of calculating workloads for employees in your organization. Each workload rule is associated with a specific assignment object. For instance, you can define two workload rules to calculate:

   - Open Service Requests for an employee
   - Critical Service Requests submitted through Siebel eService

6 Define assignment rules, assignment criteria, assignment criteria values, and assignment workloads.

   Using the strategy, rules, and criteria discussed above, define the assignment rules and the corresponding details using the Assignment Administration views. In defining rules, criteria, values, and workloads, you can specify scores for each component. These scores are aggregated in determining the total score for each candidate of an assignment rule.

7 Define candidates.

Using the All People check box or the Assignment Rule Employees view, define the eligible employees for assignment. You may further restrict or weight employees who have different skills using the Compare to Person assignment criteria.

8 Define employee skills.

After the assignment rules and the corresponding details have been defined, a customer service manager must update the employee skill information (such as product expertise, language skills, and geography) using the Employee Skills view (User Administration > Employees > Employee Skills). Assignment Manager uses these attributes when evaluating Compare to Person and Compare Object to Person assignment criteria.

9 Release assignment rules.

In the Assignment Rules view, click the Release button. You can then run Batch Assignment to assign objects affected by the assignment rules. For more information about Batch Assignment, see "Running Assignment Manager in Batch Mode" on page 236.

Figure 9 shows a sample assignment rule for assigning support representatives to a service request.

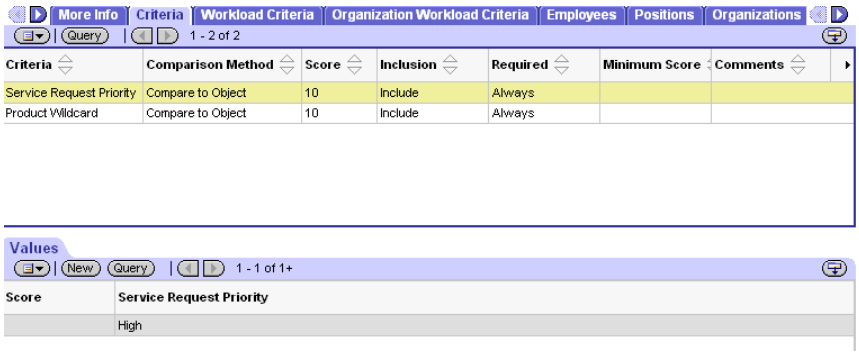


Figure 9. Assignment Rule for a Service Organization

The assignment rule shown in Figure 9 on page 83:

- Matches any service request:
  - For Pentium III 600 products
  - With a priority of High
- Uses two criteria with the following values:
  - **Product Wildcard.** A list of products that include the value CPU Pentium III 600
  - **Service Request Priority.** A list of service requests whose priority level is High

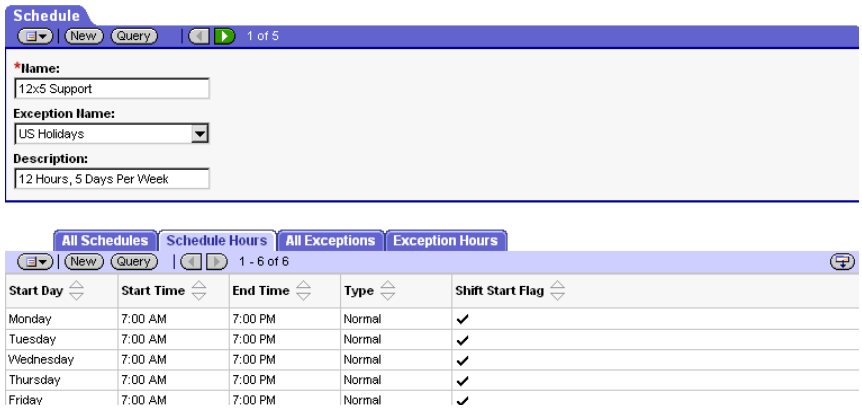
Creating Field Service Assignment Rules Using Availability

The service request object—which is often associated with a job, a finite time period, and a specific owner—is an example of an object that can be assigned using Assignment Manager's Availability-based assignment feature. The following Field Service example creates an assignment rule that evaluates a service request object and assigns the object to the highest scoring employee based on the employee's skill level and availability. To use the availability feature, certain setup procedures must be performed in the Field Service application before creating the assignment rule. See "Availability-Based Assignment" on page 45 for further information on this feature and its requirements. Several configurations must also be made to the Assignment object before using the availability feature. See "Configuring Assignment Objects for Availability-Based Assignment" on page 107. The following example assumes that a service region (California Service Region), employees (West Coast Service Representative and West Coast Service Manager), and a product (Pentium III Desktop) are defined. The server component FieldSvc must also be enabled before running the example.

To set up the Field Service application for availability assignment

1 Verify a schedule exists with valid hours.

Navigate to the Application Administration screen Schedules view. For this example, select the 12x5 Support schedule in the All Schedules List and click the Schedule Hours tab. Make sure the hours listed are valid. The following figure shows this view.



2 Set up a Service Region.

Navigate to the Scheduling Administration screen Service Regions view. For this example, select the California Service Region. In the Schedule field, select 12x5 Support.

3 Set up the parameter set for the Service Region.

With California Service Region selected, navigate to the Parameters Sets view (in the Scheduling Administration screen). For this example, select the West Coast Parameters used by the California Service Region and click the Parameters tab. Update the following parameter records:

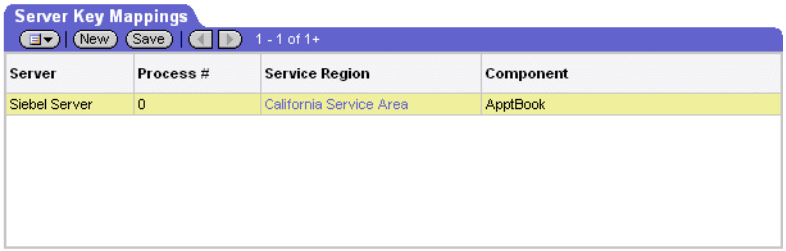
- ABS Days to Start = 1
- ABS Days to End = 20
- ABS Logging Level = 4

4 Set up Server Key Mappings

Navigate to the Server Key Mappings view in the Scheduling Administration screen. For this example, create a new record and save it with the following field values:

- Server = Siebel Server
- Process = 0
- Service Region = California Service Region
- Component = ApptBook

The following figure shows the Server Key Mappings tab.



5 Associate Employees to the Service Region.

Navigate to the User Administration screen, Employees view. For this example, select the West Coast Service Representative and the West Coast Service Manager and click the Field Service Details tab. Edit the Schedule and Service Region fields with 12x5 Support and California Service Region, respectively.

After the Field Service Application is configured, create the assignment rule that uses the assignment availability feature.

To create the Field Service Assignment Rule

1. Create the Assignment Rule.

   Navigate to the Assignment Administration screen, Assignment Rules view and create the assignment rule. For this example, name the rule West Coast Service. Define the Assignment Object as Service Request and the Assignees From Rule as One, Best Fit. The Check Calendar box is the field that activates the assignment availability feature. Check this box once to make this feature operational.

2. Determine Assignment Criteria.

   Navigate to the Assignment Criteria tab and create Product criteria for the assignment rule. For this example, service representatives are evaluated with the Compare Object to Person based on an employee's product knowledge.

3. Determine Assignment Criteria Values.

   Navigate to the Assignment Criteria Values view and create a new record with Pentium III desktop.

4. Define Employees for the Assignment Rule.

   Navigate to the Assignment Employee view and add the West Coast Service Representative and the West Coast Service Manager to the assignment rule.

5. Release the Assignment Rule.

Now, when a service request is created with attributes that match both West Coast service representatives, Siebel Assignment Manager, through the Field Service Appointment Book component, assigns the employee who has available time in his or her calendar and work schedule. Optionally, the Appointment Book component can create an activity in the assigned employee's calendar. See "Configuring Assignment Objects for Availability-Based Assignment" on page 107 for further information. Figure 10 shows the assignment rule described in the preceding procedure.

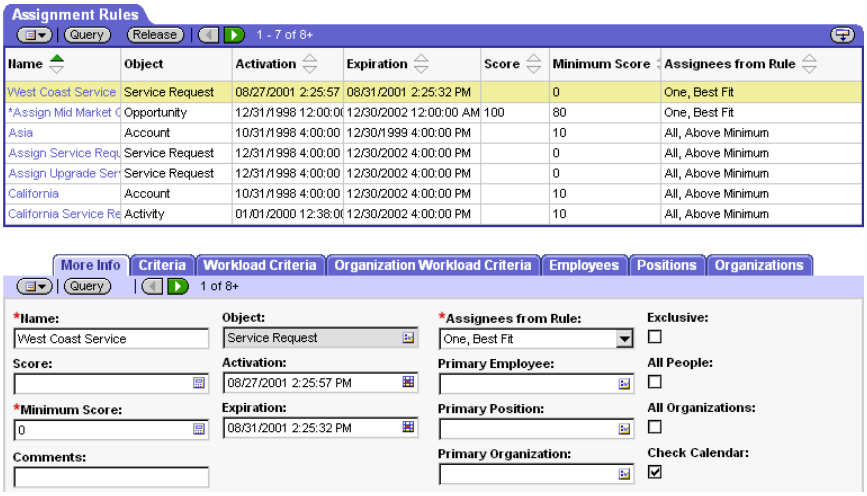


Figure 10. A Field Service Assignment Rule with the Check Calendar Field Activated

Assignment Manager Configuration 3

This chapter explains how to configure Assignment Manager components. Configuration tasks outlined in this chapter are performed using Siebel Tools. Perform the procedures described in this chapter if you need to:

- Modify the predefined assignment objects

  For more information, see "Configuring Assignment Objects" on page 100.

- Create new assignment objects

  For more information, see "Creating Assignment Objects" on page 98.

- Define additional assignment criteria types and attributes

  For more information, see "Configuring Assignment Criteria" on page 129 and "Configuring Assignment Criteria Attributes" on page 133.

- Remove existing assignment criteria and attributes

  For more information, see "To remove seed assignment criteria" on page 118.

- Disable existing assignment attributes

  For more information, see "Disabling an Assignment Attribute" on page 139

- Create new workflow policy components

  For more information, see "Creating Workflow Policy Components" on page 145.

If you plan to use the predefined Assignment Manager components, skip this chapter and proceed to Chapter 4, "Assignment Rules."

NOTE: If you add or change assignment objects, assignment attributes, or assignment criteria, you must migrate the repository to the server production database. For information on migrating the repository, see *Siebel Tools Reference*.

CAUTION: The criteria values, skills, and workload conditions components are specialized. Do not configure these components.

Before you can successfully configure Assignment Manager, you need to possess a solid understanding of how to use Siebel Tools. For more information, see *Siebel Tools Reference*. You should also familiarize yourself with the basics of the underlying Siebel application architecture. Assignment Manager object types are also related to Workflow Manager object types. For more information, see *Siebel Business Process Designer Administration Guide*.

Assignment Manager Configuration Concepts

Using Siebel Tools, you can create new assignment object definitions in the repository. After you compile the changes, these new assignment objects appear in the picklists in your Siebel application for assignment object selection.

Assignment Manager features that you can custom configure using Siebel Tools include:

- List of assignment objects that can be assigned to assignment rules
- List of attributes that can be incorporated in assignment criteria
- Behavior of each available assignment object, including whether certain features are activated for the assignment object
- Table and column mappings of assignment objects and attributes
- Workflow policy component and workflow policy component column mappings of attributes used in assignment criteria.

Assignment Manager Object Types

The following object types are specific to Assignment Manager and can be configured using Siebel Tools:

- **Assignment Object.** Assignment object definitions are assigned to assignment rules in the Object field of assignment rule records. An assignment object specifies a business entity to which a candidate can be assigned, what is updated to accomplish that assignment, and other assignment behavior parameters. For more information, see "Assignment Object Configuration" on page 96.
- **Assignment Attribute.** An assignment attribute object definition defines an attribute that can be referenced in assignment criteria records. It specifies a logical attribute that can be chosen from a picklist for defining comparisons. For more information, see "Configuring Assignment Attributes" on page 119.
- **Assignment Attribute Column.** An assignment attribute column object definition assigns an assignment attribute to an assignment object and a workflow policy component column. These mappings set up value matching within the assignment object and workflow policy object. For more information, see "Configuring Assignment Attribute Columns" on page 125.
- **Assignment Criteria.** An assignment criteria object definition defines an attribute, called an *assignment criteria*, that can be used in assignment criteria records. Assignment criteria appear in the picklist in the Criteria list column when you are editing an assignment rule record. For more information, see "Configuring Assignment Criteria" on page 129.
- **Assignment Criteria Attribute.** An assignment criteria attribute object definition assigns an assignment attribute to the parent assignment criteria. Assignment criteria attributes make it possible for an assignment criteria to consist of multiple attributes. For more information, see "Configuring Assignment Criteria Attributes" on page 133.

Assignment Manager Object Hierarchy and Relationship

Use the Object Explorer in Siebel Tools to view the hierarchical (parent-child) relationships of Assignment Manager object types. Figure 11 illustrates the hierarchical relationships of these object types (and two related object types in Workflow Manager configuration).

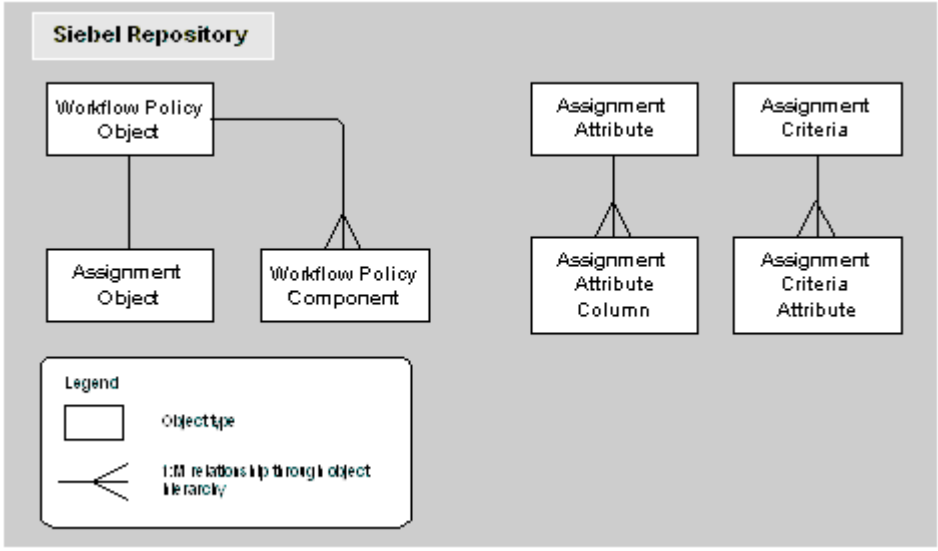


Figure 11. Parent-Child Relationships Between Assignment Manager Object Types

Figure 11 shows the following relationships:

- Assignment object is a child of workflow policy object.
- Assignment attribute column is a child of assignment attribute.
- Assignment criteria attribute is a child of assignment criteria.

In addition to the parent-child relationships between Assignment Manager object types, there are one-to-one and one-to-many relationships specified in property settings within the object definitions, as illustrated in Figure 12.

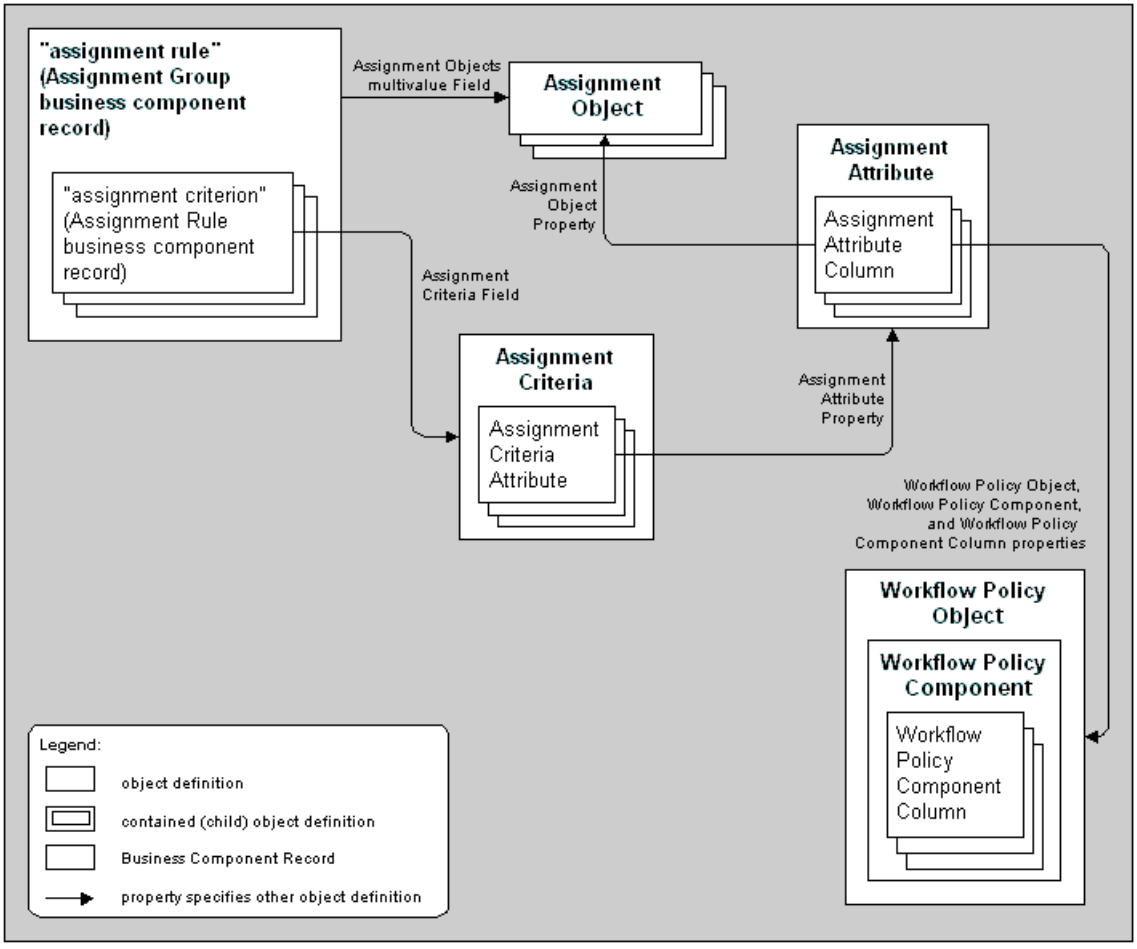


Figure 12. Field Value and Property Relationships Among Assignment Manager Object Types

Figure 12 on page 94 shows the following relationships:

- Assignment rules (the box with a dashed border at the upper left) have assignment criteria children. Assignment rules are actually records of the Assignment Group business component, and their child assignment criteria are records of the Assignment Rule business component.
- Each assignment rule points to one or more assignment object definitions, stored in a multi-value (MLOV) group attached to the Assignment Objects field in the assignment rule (Assignment Group business component) record.

  NOTE: If an assignment rule does not specify an assignment object, this means that it applies to assignment objects.

- Each assignment criteria record points to an assignment criteria object definition, by means of the value in the Criteria field.
- Assignment attributes are attached to an assignment object through a property setting in each assignment attribute column object definition.
- An assignment attribute column object definition is mapped to a workflow policy component column object definition by means of a pair of property settings.

Assignment Object Configuration

Siebel Assignment Manager uses definitions in the Siebel repository to assign objects to assignment rules and candidates.

An assignment object specifies a business entity to which a candidate can be assigned and the entities that are updated to accomplish that assignment. For example, an employee or position can be assigned ownership of an opportunity or account, or made a member of the opportunity's or account's sales team. Similarly, an employee can be assigned ownership of a service request or product defect. Each of the corresponding business components has one or more fields that specify the owner or team. An assignment rule includes one or more assignment objects. When the rule is satisfied, specific columns underlying these fields are updated with replaced or added employee IDs in accordance with the settings in the assignment object.

An assignment object is a child object type of workflow policy object. The parent workflow policy object provides a set of available column mappings through its child workflow policy component and grandchild workflow policy component column object types. These can be specified in assignment attribute column object definitions as columns to test for value matches and to monitor in dynamic assignment for value changes.

NOTE: Workflow policy objects have a one-to-one or a one-to-zero relationship with assignment objects (the Order and Quote workflow policy objects do not have predefined child assignment objects). You cannot add more assignment objects to workflow policy objects that already have a child assignment object.

Siebel applications provide predefined definitions in the Siebel repository for the following objects:

- Account
- Activity
- Campaign
- Contact
- Opportunity

- Product Defect
- Project
- Project Team
- Service Request

NOTE: The Sample database includes predefined assignment rules for several of these predefined objects. For more information about predefined assignment rules, see "Activating Assignment Rules" on page 158.

The predefined definitions include mappings for the most commonly used attributes for each object. For example, the Opportunity object has the following predefined object definitions: Account Name, Account City, Account State, Account Zip Code, Account Country, Lead Quality, Revenue, Industry SIC Code, and so on. For more information about these assignment attributes and how to configure them, see "Configuring Assignment Attributes" on page 119.

NOTE: Siebel Tools allows the creation or configuration of an assignment object with both Position- and Employee-based assignment, but Assignment Manager does not correctly assign objects with this type of configuration. Only create or configure assignment objects for either Position-based or Employee-based assignment, not both.

Assignment objects have a Lock Assignment feature that, when activated by checking the column on the object's list applet, prevents Assignment Manager from assigning, or reassigning a position or candidate to the object. You can use this feature to exclude an object (such as Account or Opportunity) from being reassigned by Assignment Manager. For example, by setting the column defined in the Exclude Column for the assignment object, Assignment Manager excludes (ignores) the object for assignment. For more information about the Lock Assignment feature, see Table 38 on page 276.

Creating Assignment Objects

You can create new assignment objects by using Siebel Tools. However, adding assignment objects can require the addition of skills or other tables and columns. Given the complexity of this requirement, contact Technical Support if you need to create new assignment objects.

CAUTION: It is recommended that you contact Siebel Technical Support for assignment object creation. If you create your own assignment objects, you run the risk of Assignment Manager assigning incorrect assignments.

To add an assignment object to a workflow policy object

1. Start Siebel Tools.
2. In the Object Explorer, expand Workflow Policy Object, and select Assignment Object.

   TIP: If Workflow Policy Object is not visible in the Object Explorer, you can enable it by selecting View > Options > Object Explorer in the Development Tools Options dialog box.

3. In the Workflow Policy Objects window, select the workflow policy object type to which you wish to add the new assignment object.
4. Select the Assignment Objects window and choose Edit > New Record.
5. Configure the assignment object by setting values in the appropriate fields for each run-time parameter.

   For a list of assignment object parameters and their default values, see Appendix A, "Assignment Object Parameters."
6. Compile the changes.

   For more information, see Step 1 in "To update your deployment with new configurations" on page 154.

7 If you are running dynamic assignment, activate an assignment policy for the assignment object.

For more information, see "Activating Assignment Policies" on page 229.

8 Update your deployment with the new configurations.

For instructions, see "Server Administration After Configuration" on page 153.

Configuring Assignment Objects

Each assignment object uses its own set of run-time parameters that control the behavior of Assignment Manager for that assignment object. These run-time parameters are stored in the Siebel repository in the assignment object definitions. You can use Siebel Tools to modify the default values for these run-time parameters. For a list of assignment object parameters and their default values, see Appendix A, "Assignment Object Parameters."

NOTE: If modifying the parameters default employee, default position, or default organization, then make sure that the values specified exist in the appropriate base table. For example, if you change the default organization to *My Organization*, there must be an entry in the Group Administration > Organizations screen called *My Organization*.

To configure assignment objects

1. Start Siebel Tools.
2. Lock the project to which the assignment object belongs.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, expand Workflow Policy Object, and select Assignment Object.
4. In the Workflow Policy Objects window, select the assignment object that you want to configure.

5 In the Assignment Objects window, configure the assignment object by setting values in the appropriate fields for each run-time parameter.

For a list of assignment object parameters and their default values, see Appendix A, "Assignment Object Parameters."

6 Update your deployment with the new configurations.

For instructions, see Step 2 on page 154 and Step 3 on page 155 in the "To update your deployment with new configurations" procedure.

NOTE: It is not necessary to recompile the siebel.srf file when configuring an assignment object. For more information on when to recompile, see Table 16 on page 153 and *Siebel Business Process Designer Administration Guide*.

Figure 13 shows an example of configuring the Account assignment object.

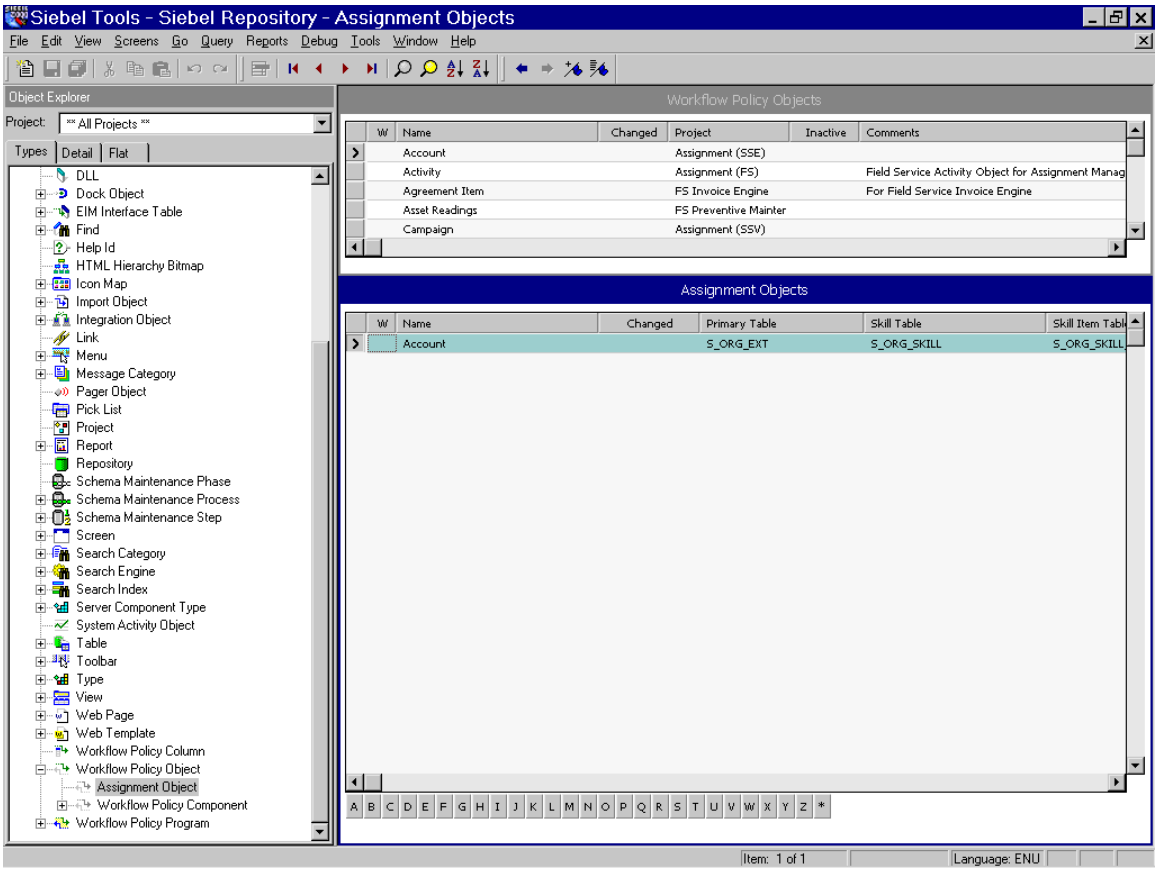


Figure 13. Example of Configuring an Assignment Object

Configuring Assignment Objects for Interactive Assignment

Interactive assignment allows users to invoke Assignment Manager immediately, view the list of assignees generated by Assignment Manager, and then override or confirm the assignees in the list. Users can invoke Interactive Assignment by clicking the appropriate object's form Menu button and choosing Assign. Figure 14 shows the Assign option from the Menu button from the All Service Requests view.

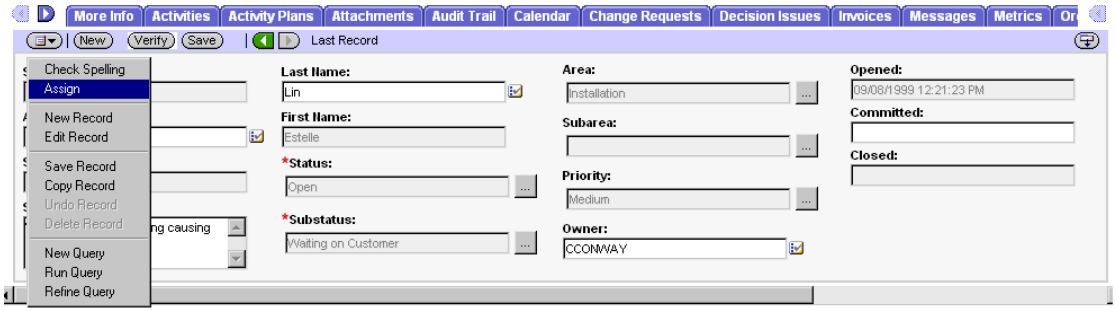


Figure 14. Example of Interactive Assignment

When the user clicks the menu button in the More Info form and chooses Assign for the current service request, the Siebel client contacts the assignment server and creates a list of qualified employees sorted by descending scores. The list of qualified employees appears to the user in the Employees window. The user then selects an employee from the list to be the service request owner.

Alternatively, you can allow SmartScript to have Assignment Manager select the most qualified candidate from the list. In this case, a list of qualified employees does not appear in the Employees window, and the most qualified candidate is assigned.

The Service Request assignment object is configured for Interactive Assignment by default. You can use Siebel Tools to configure Interactive Assignment for other assignment objects. For more information on Interactive Assignment, see "Interactive Assignment" on page 60.

To configure interactive assignment for an assignment object

1. Verify that Assignment Manager is configured to perform assignment of values in the desired field, including the presence of the necessary assignment object and assignment rules and values.
2. Verify that the displayed business component is of the CSSBCBase class or one of its subclasses and add the Assignment Object business component user property to the business component.
   a. In the Object Explorer, select Business Component.
   b. In the Business Components window, select the business component.
   c. In the Class property for that business component, verify the value is CSSBCBase (such as in the Account business component).

   NOTE: Business components based on other classes cannot be configured for interactive assignment. If the class is not CSSBCBase, note the class name and locate it in the Object Explorer for the Class object type. Note the value in the Super Class property for this class. If the Super Class is CSSBCBase, interactive assignment is permitted. If the Super Class is not CSSBCBase, check the Super Class property for that class.

   d. Set the Name property to Assignment Object.
   e. Set the Value property to the name of the assignment object that is to be used in the assignment process.
3. Verify that the appropriate applet is of the CSSFrameBase class or one of its subclasses.
   a. In the Object Explorer, select Applet.
   b. In the Applets window, select the applet.
   c. In the Class property for that applet, verify the value is CSSFrameBase (such as Account Entry Applet).

   NOTE: Applets based on other classes (including CSSFrameListBase) cannot be configured for Interactive Assignment.

4 Add the Assignment Type business component user property to the business component.

   a In the Object Explorer, select Business Component.

   b In the Business Components window, select the business component, and then click Business Component User Prop.

   c Set the Name property to Assignment Type.

   d Set the Value property to:

   - People if you are setting up an employee- or position-based assignment
   - Organizations if you are setting up an organization-based assignment

5 Optionally, if you want to enable SmartScript, add the Assignment Interactive business component user property to the business component.

   a Set the Name property to Assignment Interactive.

   b Set the Value property to TRUE.

6 Add the Assign selection to the applet menu button.

   a In the Object Explorer, select Applet.

   b In the Applets window, select the applet to which you want to add the Assign functionality.

   c In the Object Explorer, select Applet Method Menu Item.

   d Select the Applet Method Menu Items window, choose Edit > New Record and set the following values:

   - Command = Assign(SWE)
   - Menu Text = Assign
   - Position number = 1 (or to the number corresponding to the preferred placement in the menu)

7 Add the business component that holds assignment results records to the business object of the view in which the reconfigured applet is used.

NOTE: This business component already exists, and is either: 1) Assignment Results (Position) or Assignment Results (Employee) if Assignment Type is set to People (depending on whether you are setting up an employee- or position-based assignment), or 2) Assignment Results (Organizations) if Assignment Type is set to Organizations.

---

a In the Object Explorer, select Business Object.

b In the Business Objects window, select the Business Object for which you want to add a child business object component.

c In the Object Explorer, click Business Objects Components, and in the Business Objects Components window, choose Edit > New Record.

d In the new record, enter values in the appropriate fields with the BusComp name set to: Assignment Results (Position), Assignment Results (Employee), or Assignment Results (Organization).

8 Optionally, the business component user property called Assignment Results BusComp and the applet user property called Assignment Results Applet can be defined.

NOTE: These user properties are desirable when you need to show additional information about the results. For example, the service request assignment results can be joined with the CTI tables, and query only qualified service people who are not currently using their telephone. The name of the business component used to hold data for the additional fields would be specified in an Assignment Results BusComp user property in the business component being assigned. The name of the applet used to display the assignment results would be specified in an Assignment Results Applet user property in the applet from which assignment is invoked.

---

9 Add one of the following Business Components (depending on what is being assigned) to the relevant Business Object: Assignment Group Position, Assignment Group Employee, or Assignment Group Organization.

10 Update your deployment with the new configurations.

For instructions, see Step 1 on page 154 in the "To update your deployment with new configurations" procedure.

NOTE: Other than recompiling the siebel.srf file, there are no additional administrative tasks required for this procedure. For more information on when to recompile, see Table 16 on page 153 and *Siebel Business Process Designer Administration Guide*.

Configuring Assignment Objects for Availability-Based Assignment

Configuring assignment objects for availability-based assignment allows Assignment Manager to review an employee's calendar as a criterion for assignment. If the employee's calendar has no activities booked at the time required by the object, and has a sufficient time period available for the object's duration, the employee qualifies for assignment. For more information on availability-based assignment, see "Availability-Based Assignment" on page 45 and "Assigning Employees to Assignment Rules Based on Availability" on page 193.

Before configuring the assignment object, make sure the following information is satisfied:

- The Field Service Component Group is enabled.

  For more information, see *Siebel Server Administration Guide*.

- A mapping of the server to the Field Service components and region exists.

  For more information, see *Siebel Field Service Guide*.

- Employees are associated with service regions.

  For more information, see *Siebel Field Service Guide*.

- The object that you are configuring for assignment availability has the necessary columns in its database table (information and procedure follow).

By default, the Activity assignment object has the required columns in its database table for Start Time and Duration; however, one column must be extended if the Early Start Time field is desired. All other assignment objects must have their base tables extended. To extend an object's base table for availability-based assignment, use the following procedure. As an example, the Service Request Assignment object is considered.

CAUTION: You must review the sections on extension tables and columns in *Siebel Tools Reference* before completing this procedure.

To extend the Service Request's base table for availability-based assignment

1. Start Siebel Tools.
2. In the Object Explorer, expand the Table object, and then select Column.
3. In the Tables window, query for the S_SRV_REQ table.
4. With the S_SRV_REQ table selected, choose Tools > Lock Project to lock the project.

   The project associated with the S_SRV_REQ table is newtable.
5. In the Columns list, choose Edit > Add New Record to add the records in the following table (only Record 1 and 2 are required):

	Record 1	Record 2	Record 3 (Optional)
Name	X_DURN_MIN	X_START_TIME	X_EARLY_START_TIME
Physical Type	Number	UTC Date Time	UTC Date Time
Length	22	7	7
Precision	22		
Scale	7		
LOV Type	APPOINTMENT_ DURATION		

	Record 1	Record 2	Record 3 (Optional)
Cascade Mode	Ignore	Ignore	Ignore
TxnLog Code	TRUE	TRUE	TRUE

6 In the Table column window and after you have created the new records you need, click Apply.

This sends the new columns to the appropriate tables in the database.

7 Complete the fields in the Apply Schema dialog box.

a In the Tables field, click the select button, and choose one of the following:

- All
- Current Query
- Current Row

b In the Table owner password field, enter the appropriate value.

c Click Apply.

The S_SRV_REQ table is now extended with the following three columns: X_DURN_MIN, X_EARLY_START_TIME, and X_START_TIME.

With the appropriate columns in place, use the following procedure to configure availability criteria for the assignment object.

To configure Availability-based Assignment for an assignment object

1 Start Siebel Tools.

2 Lock the assignment object's project.

a In the Object Explorer, click the Types tab, and select Project.

b In the Projects window, select the appropriate project.

c Check the Locked field.

3 In the Object Explorer, expand Workflow Policy Object and select the assignment object.

4 In the Assignment Objects list, select the object you want to configure, and set the column values, as shown in the following table:

Column	Required	Value
Calendar Start Time Column	Yes	The table column that references the start time of the object. For example, X_START_TIME.
Calendar Duration Column	Yes	The table column that references the duration of the object. For example, X_DURATION.
Calendar Early Start Time Column	No	The table column that references the early start time of the object. For example, X_EARLY_START_TIME.
Calendar Create Activity	No	Check this column if you want an activity created for the assigned employee. TRUE = Activity *is* created in employee's calendar FALSE = Activity *is not* created in employee's calendar Note: You must check this field if you plan to use the Appointment Booking System to detect conflicts. For more information about the Appointment Booking System, see "Availability-Based Assignment" on page 45 in this guide and *Siebel Field Service Guide*.
Calendar Activity Additional Fields	No	When this field is specified, Assignment Manager sets the field value to the row ID of the assignment object when it creates the activity. Assignment Manager also sets the additional fields to the specified field values. For example, for the Service Request object, you can specify the following fields: Activity SR Id, Type, To Do.

NOTE: The fields in the preceding table are specified as one value string for that property.

If a value is not specified for the field specified in the Calendar Start Time Column column for an assignment object, Assignment Manager does not check calendars when assigning that object, even if the assignment rule has the Check Calendar flag checked. Instead, Assignment Manager assigns all candidates who meet the criteria for the rule. For example, if you don't specify the Start Date or Due Date for an activity, Assignment Manager does not check calendars when assigning this activity, even if the assignment rule has the Check Calendar flag checked. Instead, Assignment Manager assigns all candidates who meet the criteria for the rule.

After these fields are configured for the assignment object, they must be made visible to the end user by adding them to the appropriate business component and applets. For these procedures, see *Siebel Tools Reference*.

Configuring Assignment Objects for Multitiered Assignment

Configuring assignment objects for multitiered assignment allows Assignment Manager to consider the relationship between people and organizations when determining the proper assignment. By default, Assignment Manager assigns people and organizations independently. Multitiered assignment runs in a variety of modes. For more information on multitiered assignment and the assignment modes, see "Multitiered Assignment" on page 52 and "Using Multitiered Assignment with Sales Assignment Rules" on page 78.

To configure an object for multitiered assignment

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, expand Workflow Policy Object and select the assignment object.
4. For the assignment object, change the Assignment Mode field to the multitiered assignment mode operation of interest (choices are Independent, Org & Person-oriented, Organization-oriented, and Person-oriented) as shown in Figure 15 on page 113.

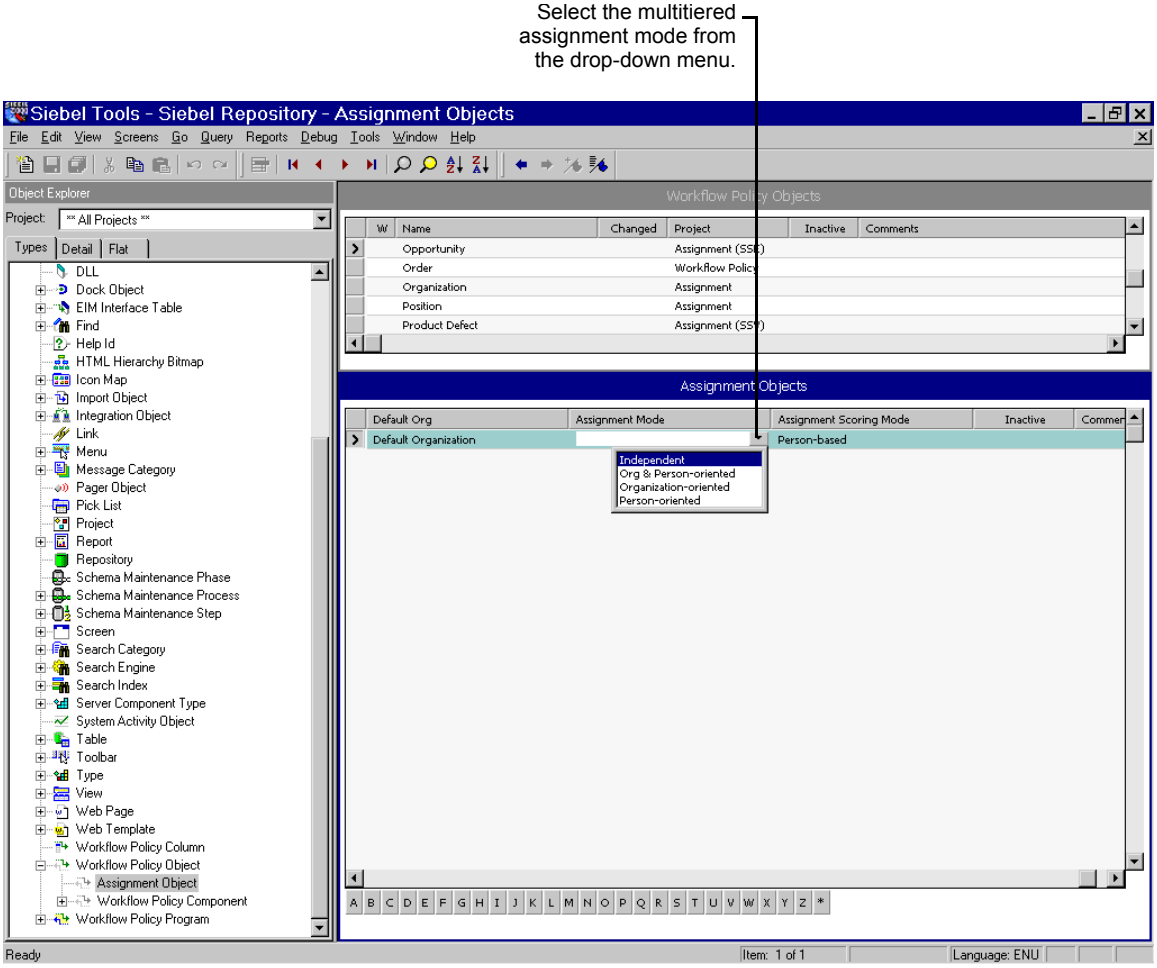


Figure 15. Selecting the Multitiered Mode

Configuring Assignment Objects for Team Scoring

Configuring Team Scoring allows Assignment Manager to save candidates' scores to the team table for those candidates who are assigned to an assignment object. These scores can be then used by other Siebel applications or exposed through the user interface. See "Assignment Scoring" on page 51 for more information.

Before configuring the assignment object, make sure the object has the necessary columns in its database table. To extend an object's database table for team scoring use the following procedure. As an example, the Opportunity object is considered.

CAUTION: You must review the sections on extension tables and columns in *Siebel Tools Reference* before completing this procedure.

To extend the Opportunity object's base table for team scoring

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, expand the Table object and select Column.
4. In the Tables list, query for the S_OPTY table.

5 In the Columns window, add the records shown in the following table (the values and records shown are examples and can be modified, as appropriate, for your deployment):

	Record 1	Record 2
Name	X_POS_SCORE	X_ORG_SCORE
Physical Type	Data(Public)	Data(Public)
Length	22	22
Precision	22	22
Scale	7	7
Cascade Mode	Ignore	Ignore
TxnLog Code	TRUE	TRUE

6 Select each new record and click the Apply button.

7 Enter the appropriate value for tableowner password.

The S_OPTY table is now extended with the following columns: X_POS_SCORE and X_ORG_SCORE.

After the necessary base table columns are in place, use the following procedure to configure the assignment object for team scoring.

To configure assignment objects for team scoring

1 Start Siebel Tools.

2 Lock the assignment object's project.

   a In the Object Explorer, click the Types tab, and select Project.

   b In the Projects window, select the appropriate project.

   c Check the Locked field.

3 In the Object Explorer, expand Workflow Policy Object and select Assignment Object.

4 In the Workflow Policy Objects list, select the object you want to configure.

5 In the Assignment Objects list, select the object, and set one of the column values as shown in the following table:

Column	Value
Employee Team Score	The table column that references a Number column in the assignment object's employee team table.
Org Team Score	The table column that references a Number column in the assignment object's organization team table.
Position Team Score	The table column that references a Number column in the assignment object's position team table.

For information on modifying the appropriate components that expose the scoring information to the user interface, see *Siebel Tools Reference*.

Assignment Criteria Configuration

You can add new assignment attributes and assignment criteria using Siebel Tools.

Assignment attributes allow you to associate a single criteria value to multiple fields in the application. For example, you can define an assignment rule that matches candidates based on State. However, State is stored in a different field in the application for different objects. Assignment attributes map the places that State is defined into a single criteria value.

Assignment attributes can be either column-based or skill-based. Column-based attributes are stored as columns in the object (such as Opportunity). You can use existing columns in the object, or use Siebel Database Extensibility to add new extension columns to the object. Skills-based attributes are stored as rows in the object's skill tables (if any).

If you are adding an assignment attribute to a new table, you need to modify the existing Workflow Manager definitions in the Siebel repository. For more information, see *Siebel Business Process Designer Administration Guide*.

An assignment criteria can consist of one or more assignment attributes, such as the criteria Account City, Account State, and Account Country. These assignment attributes are grouped as assignment criteria. In this case, a single assignment criteria includes three assignment attributes. Assignment criteria correspond to the Criteria column in the Assignment Administration views. To add or change drop-down fields that define assignment criteria in an assignment rule, you should define or modify assignment criteria. Assignment criteria attributes enumerate assignment attributes for the assignment criteria.

When you create new assignment criteria, you typically perform the following procedures (in the order listed):

- Create new assignment attributes
- Create new assignment attribute columns to map new assignment attributes to existing assignment objects
- Create new assignment criteria to group new assignment attributes

- Create assignment criteria attributes to enumerate assignment attributes for the assignment criteria

NOTE: Assignment criteria configured to include multiple assignment attributes cannot have these attributes based on columns in different tables.

To eliminate default assignment criteria appearing in the Assignment Criteria view, use the following procedure.

To remove seed assignment criteria

1. Delete from any assignment rules the use of the criteria you want removed from the assignment criteria (Assignment Rules > Criteria).
2. In Siebel Tools, inactivate the assignment attribute column, the assignment attribute, the assignment criteria attribute, and the assignment criteria.

   For more information, see "Disabling an Assignment Attribute" on page 139.
3. Recompile all projects (not just the locked projects) in the .srf file.

   For instructions, see Step 1 on page 154 of the "To update your deployment with new configurations" procedure.

Configuring Assignment Attributes

An assignment attribute object definition defines an attribute that can be referenced in assignment criteria records. It specifies a logical attribute that can be chosen from a picklist for defining comparisons; it does not directly specify a particular database column or combination of columns. Column mapping is accomplished through the child assignment attribute column object definitions, one for each assignment object that uses the parent assignment attribute.

An assignment attribute also specifies the picklist that appears in the Values list in the Assignment Criteria view when you are entering an attribute in a value record, as shown in Figure 16.

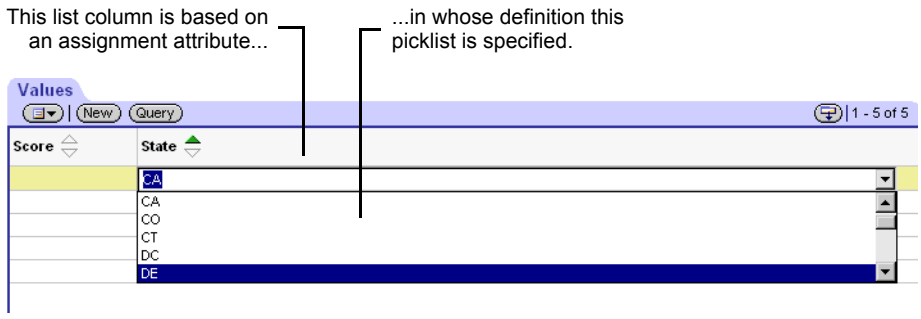


Figure 16. Picklist for Populating an Attribute in a Value Record

An assignment criteria attribute object definition implements each list column in the Values applet, as described in "Configuring Assignment Criteria Attributes" on page 133. The assignment criteria attribute is based on an assignment attribute, as specified in its assignment attribute property. The referenced assignment attribute identifies a picklist. This is the picklist that appears when you click the drop-down arrow to the right of the list column cell.

The Assignment Attribute object type functions as an intermediary between the assignment criteria on the one hand and the assignment objects on the other, as shown in Figure 12 on page 94.

An assignment criteria attribute references an assignment attribute through its assignment attribute property. In turn, each of the assignment attribute's child assignment attribute columns specifies an assignment object and a workflow policy component/column combination.

An assignment attribute is a logical grouping of similar mappings to different assignment objects that can use the same picklist for value selection. For example, the Account State assignment attribute has ten child assignment attribute column object definitions. Each of these assignment attributes is used for selection of the state in which an account is located, but five of them are used for different assignment objects (Activity, Account, Campaign Contact, and Order), and the other five are used for different account state attributes in the Opportunity assignment object (such as Primary Account State and Indirect Account Primary State).

NOTE: To generate a trigger based on an assignment attribute, a corresponding assignment attribute column must be configured. See Configuring Assignment Attribute Columns on page 125.

To create new assignment attributes

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, select the Assignment Attribute object, and then choose Edit > New Record.
4. In the Assignment Attributes window, configure the assignment attribute object by setting values in the appropriate fields.
   a. In the Name field, type the name of the new assignment attribute.
   b. In the Project field, select a project.
   c. Optionally, if the attribute supports a range of values (such as revenue), check the Use Range field.
   d. In the Data Type field, select a data type for the attribute.
   e. Optionally, if you want a picklist for the attribute to allow users to select values for the assignment attribute, enter a value in the Picklist field.
   f. Optionally, you can use a pick field for the attribute to allow users to select values for the assignment attribute, enter a value in the Pick Field field.

   For a description of these properties, see Table 10 on page 123.
5. Update the siebel.srf file and run various server administration tasks.

   For instructions on updating your deployment with the new configurations, see "Server Administration After Configuration" on page 153.

Figure 17 shows an example of creating an assignment attribute called Example of data type Varchar. This attribute also has the optional Assignment Attribute Picklist and the Employee Skill pick field selected.

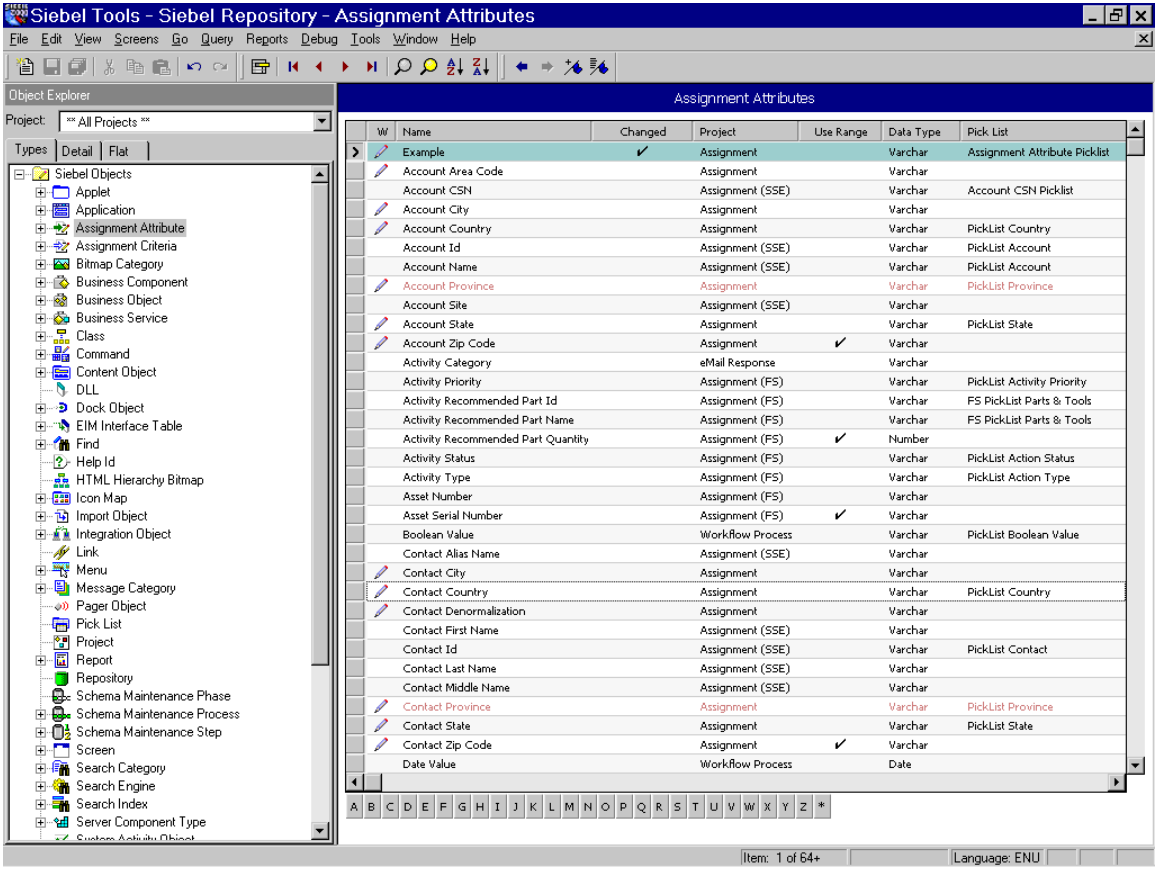


Figure 17. Example of Creating an Assignment Attribute

Table 10 shows some of the properties of the Assignment Attribute object type.

Table 10. Properties of Assignment Attributes

Property	Required	Description
Bounded	Optional	When checked, the picklist is bounded (you can select a value from the picklist). When unchecked, you can enter a value that does not appear in the list.
Data Type	Required	Data type for the assignment attribute. Number, UtcDateTime, and Varchar are supported.
Name	Required	Name of the assignment attribute. Must be unique within the repository.
Order By LOV Type	Optional	Not used.
Pick Field	Optional	Name of the field to select from the picklist.
Pick List	Optional	Name of the picklist that supplies the selection values for populating any list column in the Values list (in the Assignment Criteria view) that is based on this assignment attribute.
Use Range	Optional	Specifies whether a single list column or a pair of list columns, indicating a range, appears for assignment criteria attributes based on this assignment attribute. For example, the Revenue assignment attribute, which has a TRUE value for Use Range, appears as two list columns, Revenue Low and Revenue High. You can enter 50000 in the former and 100000 in the latter in a value record to indicate the range $50,000–100,000.
Translate	Optional	When checked, enables MLOV capability for the attribute. For more information on enabling this feature, see “Configuring MLOV for Assignment Attributes” on page 124.

Configuring MLOV for Assignment Attributes

Multilingual List of Values (MLOV) capability allows assignment attributes to be stored in a form that can be retrieved and displayed in a variety of supported client languages. For detailed information on MLOV, see *Siebel Tools Reference*. To enable assignment attributes for MLOV, use the following procedure.

To enable assignment attributes for MLOV

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and then select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, select the Assignment Attribute object.
4. Select the Assignment Attribute in the list of attributes that requires translation.
5. Locate the Translate column for this attribute, and select the check box to assign this property with a TRUE value.
6. Locate the Translate Pick Field for the assignment attribute, and select from the Translate Pick Field dialog box the field in the Pick List Business Component that stores the Language Independent Code (in most cases this is the Name field).

You can also configure the application to enable MLOV for workload criteria, criteria values, and skills. For more information, see *Siebel Tools Reference*.

Configuring Assignment Attribute Columns

An assignment attribute column object definition maps an assignment attribute to an assignment object and a workflow policy component column, as shown in Figure 12 on page 94. These mappings set up value matching within the assignment object and workflow policy object for criteria that use the parent assignment attribute.

The parent assignment attribute is an abstract logical attribute to test for a value match, which you can specify in an assignment criteria. The child assignment attribute columns specify the actual mappings to assignment objects and workflow policy component columns. Each assignment attribute column can specify a different assignment object to search, or a different attribute within the same assignment object.

To map assignment attributes to an existing assignment object

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, expand the Assignment Attribute object, and select the Assignment Attribute Column object.
4. In the Assignment Attributes window, select the assignment attribute for which you want to map the logical location in the database schema.
5. In the Assignment Attribute Columns window, choose Edit > New Record.
6. Configure the assignment attribute object by setting values in the appropriate fields.
   a. In the Name field, type the name of the new assignment attribute column.
   b. In the Assignment Object field, select an assignment object to which the assignment attribute is applied.

c In the Workflow Policy Component field, select a workflow policy component to which the workflow policy object is applied.

d In the Workflow Policy Component field, select a workflow policy component column to which the workflow policy component is applied.

e In the Sequence field, type in a sequence value.

For descriptions of these properties, see Table 11 on page 128.

7 Update the siebel.srf file and run various server administration tasks.

For instructions on updating your deployment with the new configurations, see "Server Administration After Configuration" on page 153.

Figure 18 shows an example of mapping an assignment attribute called Example to the Service Request assignment object. This attribute is also mapped to the Service Request workflow policy object, the Product workflow policy component, the Product ID workflow policy component column, and a sequence value of 1.

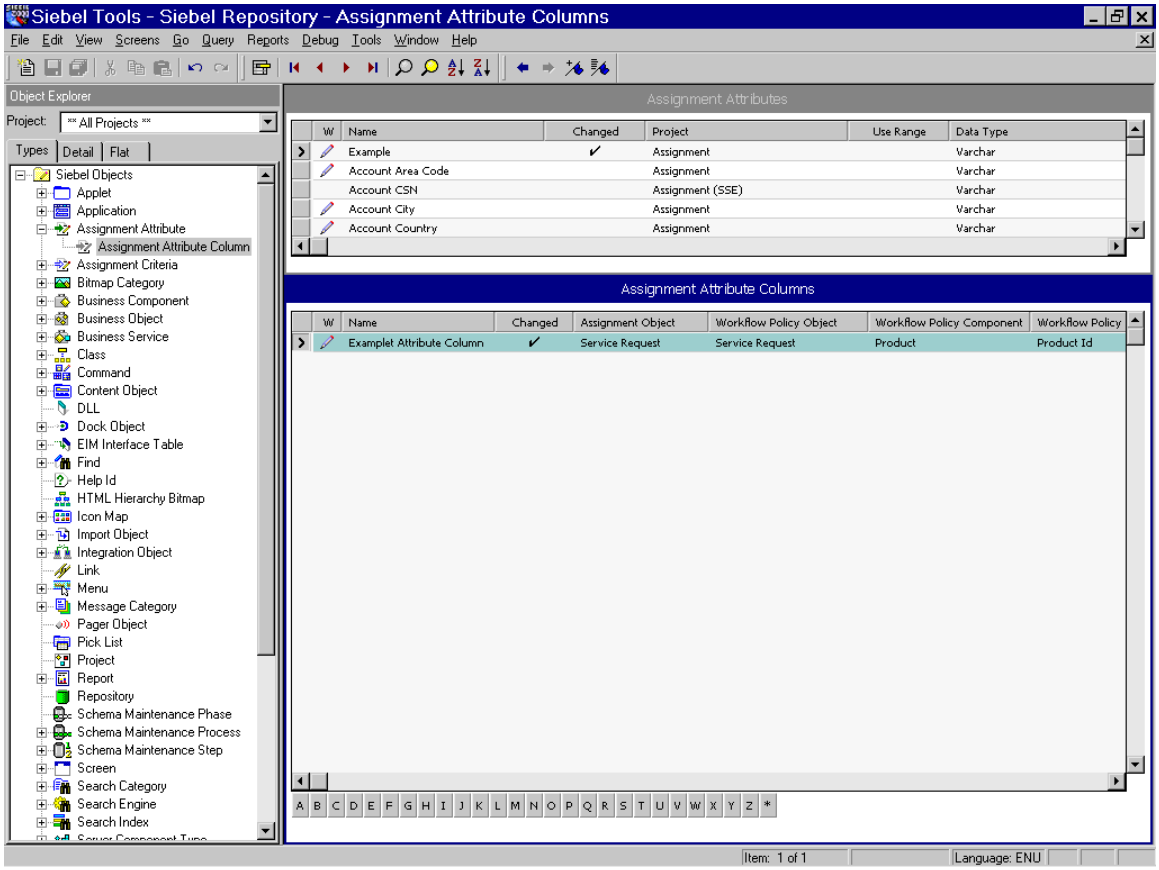


Figure 18. Mapping an Assignment Attribute to an Assignment Object

Table 11 shows some of the properties of the Assignment Attribute Column object type.

Table 11. Properties of Assignment Attribute Columns

Property	Required	Description
Assignment Object	Required	Assignment object that is checked for a value match with the parent assignment attribute.
Name	Required	Name of the assignment attribute column. The typical format for the name is: *assignment_object*: *workflow_component_column* For example: `Service Request: Account Area Code`
Sequence	Required	A unique sequence number for the assignment attribute column within the assignment attribute. If an assignment attribute has multiple assignment attribute columns, Assignment Manager searches for attribute values in the order of the values in this property.
Workflow Policy Component	Required	Name of the workflow policy component, within the specified workflow policy object, with which this assignment attribute column is associated.
Workflow Policy Component Column	Required	Name of the workflow policy component column, within the specified workflow policy component, with which this assignment attribute column is associated.
Workflow Policy Object	Required	Name of the workflow policy object with which the assignment attribute column is associated. When an assignment object is selected, the workflow policy object defaults to this selection.

Configuring Assignment Criteria

An assignment criteria object definition defines an attribute, called an *assignment criteria*, that can be used in assignment criteria records. Assignment criteria appear in the picklist in the Criteria list column when editing an assignment criteria record in Siebel applications.

The Criteria list column in an assignment criteria record specifies the assignment criteria that is tested for a match against one or more attributes of the assignment object or candidate. For example, in an assignment criteria that determines whether the state is California, the assignment item would be State, Home State, or Account State, and the value California (CA) would be specified in a child value record.

When you click the drop-down arrow button in the Criteria list column, a picklist appears for selection of an assignment criteria. The picklist lists the available assignment criteria (assignment criteria object definitions in the repository). When you select an assignment criteria, its name is stored in the Criteria Name field in the current Assignment Rule business component record.

NOTE: The business component that holds assignment criteria is called *Assignment Rule*. The business component that holds assignment rules is called *Assignment Group*.

An assignment criteria includes one or more assignment criteria attributes, stored as child assignment criteria attribute object definitions. For information on assignment criteria attributes, see "Configuring Assignment Criteria Attributes" on page 133.

After you create and recompile an assignment criteria object definition, it becomes available for selection from the Criteria list column picklist in assignment criteria records.

To create assignment criteria

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, select the Assignment Criteria object, then choose Edit > New Record.
4. Configure the assignment criteria by setting values in the appropriate fields.
   a. In the Name field, type the name of the new assignment criteria.
   b. In the Project field, select the Assignment project.
   c. In the Display Name field, type the name that appears for the assignment criteria.
   d. Optionally, if you want the assignment criteria stored in the skill table, check the Employee Skill field.

      For information about skill tables, see "Creating Criteria Values as Skills with Expertise Codes" on page 177.
   e. Optionally, if you want expertise codes stored for the skill, check the Use Expertise field.

      If you check this field, Assignment Manager uses expertise codes to match objects to candidates.
   f. Optionally, if you do not want the assignment criteria to appear in the Criteria picklist, uncheck the Display Flag field.

   For descriptions of these properties, see Table 12 on page 131.
5. Update the siebel.srf file and run various server administration tasks.

   For instructions on updating your deployment with the new configurations, see "Server Administration After Configuration" on page 153.

Figure 19 shows an example of creating an assignment criteria called Example Criteria. This assignment criteria has a display name of Example, and uses both skills and expertise codes to match objects to candidates.

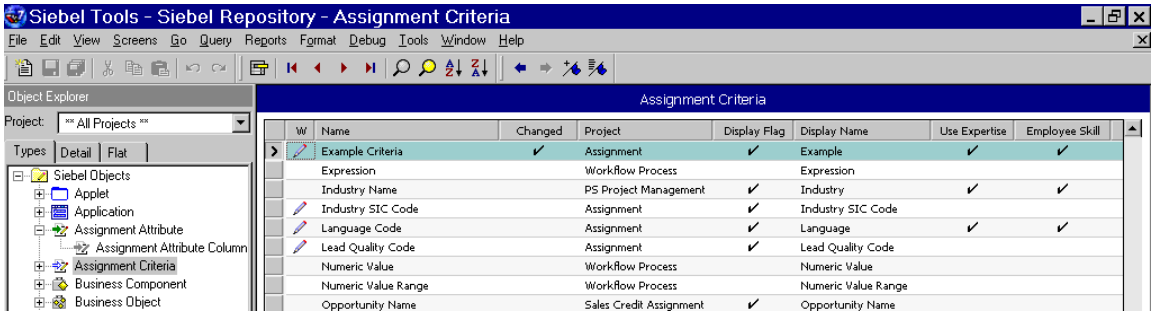


Figure 19. Creating an Assignment Criteria

The assignment criteria object definition has two properties to specify the name (internally and as displayed) and two properties that are used to configure skill tables (Employee Skill and Use Expertise). Most of the behavior of an assignment criteria is configured in the assignment criteria attribute children. Table 12 shows some of the properties of the assignment criteria object type.

Table 12. Properties of Assignment Criteria

Property	Required	Description
Display Flag	Optional	When checked, the assignment criteria appears in the Criteria picklist.
Display Name	Optional	Name that appears for this assignment criteria in the picklist and the Criteria list column in the Criteria list in the Criteria view (Assignment Rule > Criteria). If not specified, the value in the Name property is used instead.
Employee Skill	Optional	A TRUE/FALSE property that specifies whether the assignment criteria is stored in the skill table. For more information about skill tables, see "Creating Skills and Using Skill Tables" on page 141.

Table 12. Properties of Assignment Criteria

Property	Required	Description
Name	Required	Name of the assignment criteria.
Use Expertise	Optional	A TRUE/FALSE property that applies to assignment criteria that are skills. It specifies whether expertise codes are stored for the skill. If so, Assignment Manager uses the expertise code to match the assignment object to people.

Configuring Assignment Criteria Attributes

An assignment criteria includes one or more assignment criteria attributes. Assignment criteria attributes are implemented as object definitions of the assignment criteria attribute object type. This is a child object type of assignment criteria. Assignment criteria attributes make it possible for an assignment criteria to consist of multiple attributes.

For example, the Account Wildcard assignment criteria includes an Account and Site, both of which correspond to a specific column. This setup is accomplished by creating two assignment criteria attribute children, Account and Site, of the Account Wildcard assignment criteria.

NOTE: Many assignment criteria have only a single assignment criteria attribute.

The set of assignment criteria attributes in an assignment criteria determines the set of list columns to appear in the Values list, as shown in Figure 20.

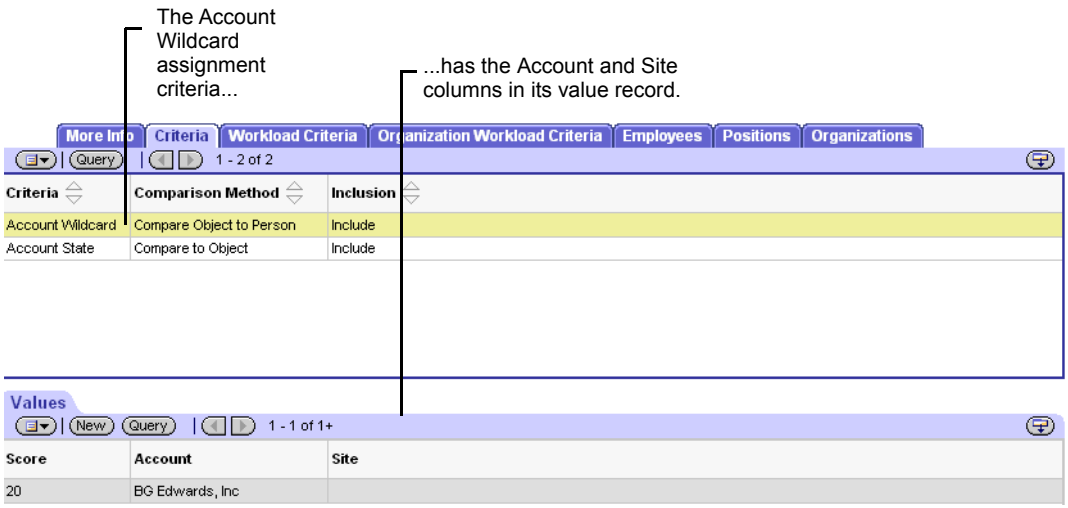


Figure 20. List Columns in the Values List

One list column appears in the Values list for each assignment criteria attribute in the assignment criteria. In Figure 20 on page 133, the Account Wildcard assignment criteria (the Account Name assignment criteria with a display name of Account Wildcard) has an Account and a Site list column in the display of its child Value records. Both the Account and Site list columns correspond to the Account Name assignment criteria attribute (with a display name of Account and Site, respectively). Figure 21 shows how this is accomplished in Siebel Tools.

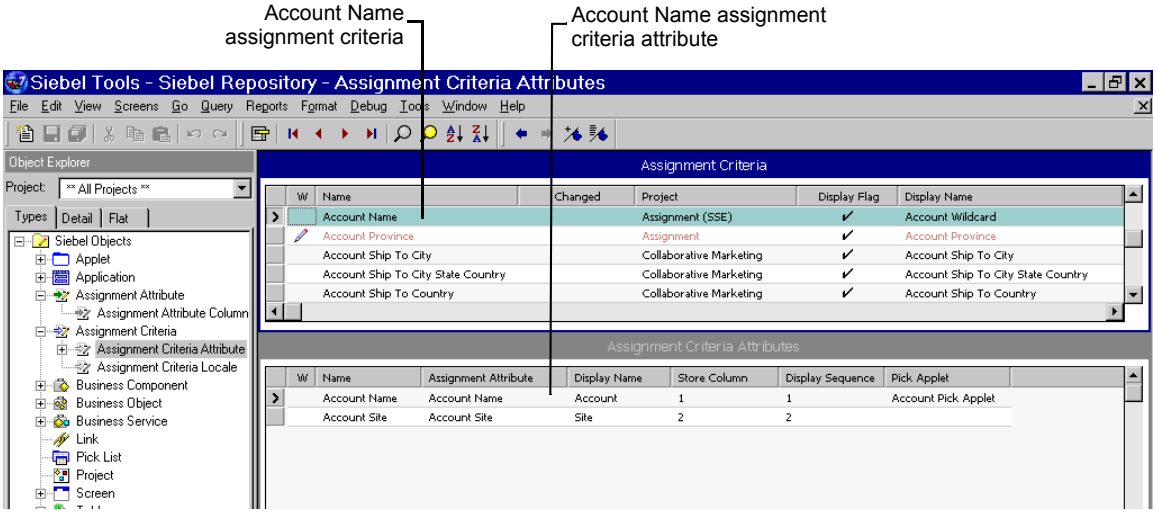


Figure 21. Assignment Criteria and Child Assignment Criteria Attribute

If there were more assignment criteria attributes for this assignment criteria, each would have a list column in the Values list. The Score list column is automatically provided, and the Expertise Code list column appears in this instance because the assignment criteria has a Use Expertise property setting of TRUE.

Assignment criteria attributes make it possible for an assignment criteria to consist of multiple attributes, each mapping to a specific assignment attribute object definition. For information on assignment attributes, see "Configuring Assignment Attributes" on page 119.

To create assignment criteria attributes

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. In the Object Explorer, expand the Assignment Criteria object, and select the Assignment Criteria Attribute object.
4. In the Assignment Criteria window, select the assignment criteria for which you want to enumerate assignment attributes.
5. Select the Assignment Criteria Attributes window, then choose Edit > New Record.
6. Configure the assignment criteria attribute by setting values in the appropriate fields.
   a. In the Name field, type the name of the new assignment criteria attribute.
   b. In the Assignment Attribute field, select the assignment attribute for this assignment criteria.
   c. In the Display Name field, type the name for the assignment criteria attribute.
   d. In the Store Column field, specify the column in the assignment factor items table where the value for the assignment criteria attribute is stored.
   e. In the Display Sequence field, specify the sequence in which the assignment criteria attribute appears.
   f. Optionally, in the Pick Applet field, choose a pick applet for the assignment criteria attribute to allow users to view or select values for the assignment criteria attribute.

   For more information on these properties, see Table 13 on page 138.

7 Update the siebel.srf file.

For instructions on updating the siebel.srf file, see Step 1 on page 154 of the "To update your deployment with new configurations" procedure.

8 Check in the Assignment project before using the assignment criteria attributes.

a In the Object Explorer, click the Types tab, and select Project.

b In the Projects window, select Assignment, and choose Tools > Check In.

9 Run various server administration tasks.

For instructions, see Step 2 and Step 3 of the "To update your deployment with new configurations" procedure.

Figure 22 shows an example of creating an assignment criteria attribute called Example Criteria Attribute. This criteria attribute applies to the Example assignment attribute, has a display name of Example, and uses the Assignment Results (Employee) list applet.

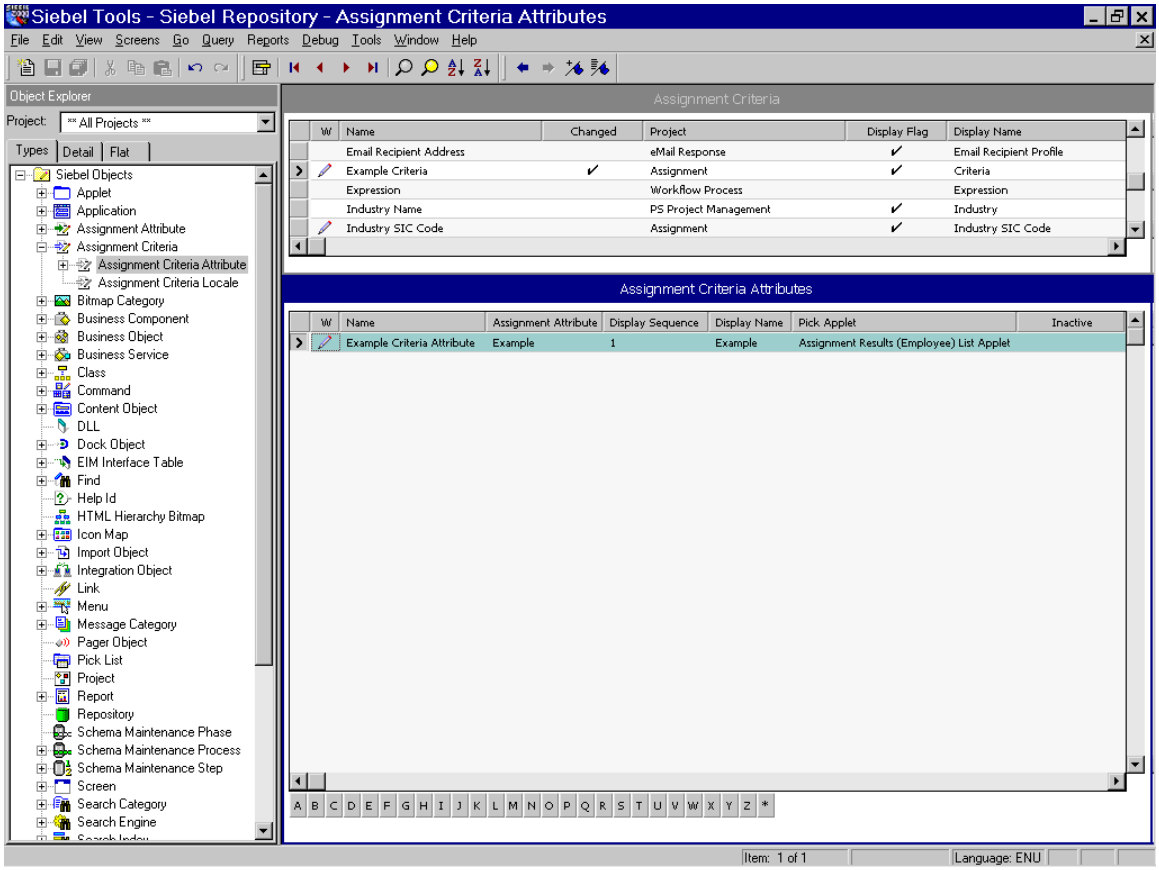


Figure 22. Creating an Assignment Criteria Attribute

Table 13 shows some of the properties of the assignment criteria attribute object type.

Table 13. Properties of Assignment Criteria Attributes

Property	Required	Description
Assignment Attribute	Required	Name of the assignment attribute that this assignment criteria attribute is based on. Selected from a drop-down list.
Display Name	Required	List column label that appears for this assignment criteria attribute in the Values list. If omitted, the Name is used in the list column label.
Display Sequence	Required	Order in which the list column for this assignment criteria attribute appears in the list applet, relative to those of other assignment criteria attributes in the assignment item. A lower number places the list column further to the left.
Name	Required	Name of the assignment criteria attribute, for identification. This name must be unique within the parent assignment criteria.
Pick Applet	Optional	If a picklist is defined for the associated assignment attribute, you specify the name of a pick applet to display the picklist for selection of a value in the attribute's list column.
Store Column	Required	Specifies the column in the assignment factor items table (S_ASGN_RULE_ITEM) in which to store the value for the assignment criteria attribute. There are four columns of each data type (Number, UtcDateTime, and Varchar) provided for storage of assignment criteria attribute values in each assignment criteria. You must specify a unique value, between 1 and 4 inclusive, for each assignment criteria attribute of the same data type. The data type can be determined from the Data Type property in the referenced assignment attribute object definition.

Disabling an Assignment Attribute

In some cases, you may need to disable an existing assignment attribute. To do so, you must also disable the assignment attribute column, assignment criteria, and assignment criteria attribute definitions.

To disable an existing assignment attribute

1. Start Siebel Tools.
2. Lock the assignment object's project.
   a. In the Object Explorer, click the Types tab, and select Project.
   b. In the Projects window, select the appropriate project.
   c. Check the Locked field.
3. Disable the assignment attribute definition.
   a. In the Object Explorer, select the Assignment Attribute object.
   b. In the Assignment Attributes window, select the assignment attribute you want to disable.
   c. Check the Inactive field.
4. Disable the assignment attribute column definition.
   a. In the Object Explorer, expand the Assignment Attribute object, and then select the Assignment Attribute Column object.
   b. In the Assignment Attribute Columns window, select the assignment attribute column you want to disable.
   c. Check the Inactive field.
5. Disable the assignment criteria definition.
   a. In the Object Explorer, select the Assignment Criteria object.
   b. In the Assignment Criteria window, select the assignment criteria you want to disable.
   c. Check the Inactive field.

6 Disable the assignment criteria attribute definition.

   a In the Object Explorer, expand the Assignment Criteria object, and then select the Assignment Criteria Attribute object.

   b In the Assignment Criteria Attributes window, select the assignment criteria attribute you want to disable.

   c Check the Inactive field.

7 Update the siebel.srf file and run various server administration tasks.

   For instructions on updating your deployment with the new configurations, see "Server Administration After Configuration" on page 153.

Creating Skills and Using Skill Tables

Skills are assignment criteria values attributed to specific assignment rules, objects, employees, positions, and organizations. Assignment Manager uses skills to match assignment rules, objects, employees, positions, and organizations.

Creating New Skills

The Siebel application provides several predefined skills, however, you can create new skills using Siebel Tools. This section explains how to view the predefined skills and create new skills.

To view predefined skills

1. Start Siebel Tools.
2. In the Object Explorer, click to select the Assignment Criteria object.
3. In the Assignment Criteria applet, query for criteria with Employee Skill equal to TRUE.

   The predefined skills appear (see Table 14) as well as any new skills you create.

Table 14 provides the predefined skills.

Table 14. Predefined Skills

Skill Name	Skill Name
■ Activity Category	■ Product
■ Email Language Code	■ Product Line
■ Email Recipient Profile	■ Product Line Wildcard
■ Industry	■ Product Wildcard
■ Language	■ Revenue

For most deployments, the predefined skills are sufficient. However, you can create new skills using Siebel Tools. The following procedure explains how to create a new skill that can be used in any Siebel application.

To create a new skill

1. Create an assignment attribute.

   For more information, see "To create new assignment attributes" on page 121.

2. Create an assignment criterion.

   For more information, see "To create assignment criteria" on page 130. When prompted in Step 4 of this procedure, you must check the Employee Skill field because you are configuring the criterion as a skill.

3. Add the assignment attribute created in Step 1 above as a child object to the Assignment Criterion created in Step 2 above.

For more information, see "To create assignment criteria attributes" on page 135. When prompted in Step 6 of the "To create assignment criteria attributes" procedure, select the assignment attribute created in Step 1 above.

NOTE: To use Assignment Manager to use a skill for the purpose of assignment, additional configuration is required. For more information, see "Assignment Criteria Configuration" on page 117.

Using Skill Tables

A skill is a generic attribute that qualifies an object. For example, if an employee speaks English and Spanish, language is the *skill* he or she possesses, and English and Spanish are the *skill items*. Employee, position, and organization skills are used to store skills *possessed*; the skill tables for objects are used to store skills *required*. Assignment Manager uses skill tables to do skill matching by comparing the skills on the object with the skills of an employee, position, or organization to determine who passes the rule.

The skill and skill item tables are child and grandchild tables, respectively, of the object used to store skills, and skill items for assignment objects that are not stored as columns in the parent table itself. The employee skill table is used to store skills possessed by employees, such as languages spoken, product expertise, and so on. For example, for an employee who speaks English and Spanish, there is one record in the employee skill table that specifies the skill name as Language. And there are two records in the child employee skill item table that correspond to this skill record: one record for English, and another record for Spanish. For more information on how to assign skills to candidate objects, see "Assigning Skills to Employees, Positions, and Organizations" on page 68.

For example, the following procedure explains how to configure Assignment Manager so that only employees who speak Spanish are assigned a service request.

To configure Assignment Manager to assign a service request only to employees who speak Spanish

1. Create a service request with Language as the skill and Spanish as the skill item.
   a. In the Service Request skill table for the service request, create one record and specify Language as the skill.
   b. In the child Service Request skill item table, create one record and specify Spanish as the skill item.

   For more information about how to perform this step, see "Creating Criteria Values as Skills with Expertise Codes" on page 177.
2. Create an assignment rule that filters employees based on their language skills.
   a. Create an assignment rule and apply the Service Request assignment object.

b Create a criterion called Language and use the Compare to Person assignment rule comparison method.

This criterion, and therefore the rule, passes only employees who have the Spanish language skill.

NOTE: The above example used the Compare to Person comparison method, however, skill matching can be used with other comparison methods. For more information about comparison methods, see "Assignment Criteria" on page 32.

Assignment Manager can also do skill matching with expertise codes and can use weighting factors to assign weighted scores to different expertise codes. For more information, see "Skills" on page 46, "Expertise Codes" on page 47, and "Weighting Factors" on page 48.

Creating Workflow Policy Components

In some cases, you can create an assignment rule that assigns candidates to two objects while using only one of the object's criteria. For example, you may want the ability to assign both Accounts and Opportunities based on the criteria Opportunity Lead Quality. To configure Assignment Manager to assign Accounts based on this criteria, you must configure and expose the Opportunity Lead Quality column to the Account Assignment object.

The following procedure explains how to create assignment rules that assign two objects using only one object criteria.

NOTE: Assignment based on calculated fields is not possible. A calculated field does not have a corresponding database table field, which is a key requirement for the definition of an assignment criterion. There is no database table field because configuration of Assignment Attribute Column requires Workflow Policy Component and Workflow Policy Component Column information, and a Workflow Policy Component Column references a database table column.

To create an assignment rule that assigns two objects using only one object criteria

1. Create a workflow policy component for both objects.

   For procedures using a specific example, see "Phase 1: Creating a Workflow Policy Component for Both Objects" on page 146.

2. Map the workflow policy component to the assignment criteria.

   For procedures using a specific example, see "Phase 2: Mapping a Column to the Workflow Policy Component" on page 148.

3. Map the workflow policy component to the assignment attribute.

   For procedures using a specific example, see "Phase 3: Mapping the Workflow Policy Component to the Assignment Attribute" on page 150.

4. Define an assignment rule for two objects using one assignment (object) criteria.

   For procedures, see "Creating Assignment Rules to Assign Two Objects" on page 250.

For more information about workflows in general, see *Siebel Business Process Designer Administration Guide*.

Example of Creating a Workflow Policy Component

This section explains how to create a workflow policy component based on a specific scenario of creating an assignment rule that assigns candidates to two objects (Account and Opportunity) using only one of the object's criteria (Opportunity Lead Quality). The example for accomplishing this is divided into four phases; perform each phase and the steps within each phase in the order provided.

- "Phase 1: Creating a Workflow Policy Component for Both Objects" on page 146
- "Phase 2: Mapping a Column to the Workflow Policy Component" on page 148
- "Phase 3: Mapping the Workflow Policy Component to the Assignment Attribute" on page 150
- "Phase 4: Administration Tasks After Configuration" on page 152

Phase 1: Creating a Workflow Policy Component for Both Objects

In this first phase, you create a workflow policy component for both objects.

To create a workflow policy component

1. Start Siebel Tools.
2. Lock the project.
   a. In the Object Explorer, click the Types tab, and then select Project.
   b. In the Projects window, select the appropriate project.

      For this example, select Assignment (SSE).
   c. Check the Locked field.
3. Select the workflow policy object for which you want to create a workflow policy component.
   a. In the Object Explorer, select Workflow Policy Object.

b In the Workflow Policy Objects window, select the object.

For this example, select Account.

4 Add a new workflow policy component record.

a In the Object Explorer, expand Workflow Policy Component.

b In the Workflow Policy Component window, choose Edit > New Record.

5 Enter information in the fields for the new record using the following steps:

a In the Name field, type the name of the workflow policy component.

For this example, type Account/Opportunity.

b In the Source Table Name field, select the source table for the workflow policy component.

For this example, select S_OPTY.

c In the Source Column Name field, select the source column for the workflow policy component.

For this example, select PR_DEPT_OU_ID.

d In the Target Component Name field, select the target component for the workflow policy component.

For this example, select Account.

e In the Target Column Name field, select the target column for the workflow policy component.

For this example, select ROW_ID.

Figure 23 on page 149 shows an example of creating the Opportunity workflow policy component that maps to the Opportunity source table and the Account target table.

Phase 2: Mapping a Column to the Workflow Policy Component

After you create the workflow policy components for both objects, you need to map the workflow policy component to the assignment criteria. You do this by mapping a column to one of the workflow policy components. In this example, you map the Opportunity workflow policy component to the Opportunity Lead Contact assignment criteria.

To map a column to the workflow policy component

1. With the Account/Opportunity record still selected, expand the Workflow Policy Component object in the Object Explorer, and then select the Workflow Policy Component Col object.
2. In the Workflow Policy Component Columns window, choose Edit > New Record.
3. In the Workflow Column Name field, select the workflow column for the workflow policy component.

   For this example, select Opportunity Lead Quality.

Figure 23 on page 149 shows an example of mapping the Account/Opportunity workflow policy component to the Opportunity Lead Quality assignment criteria.

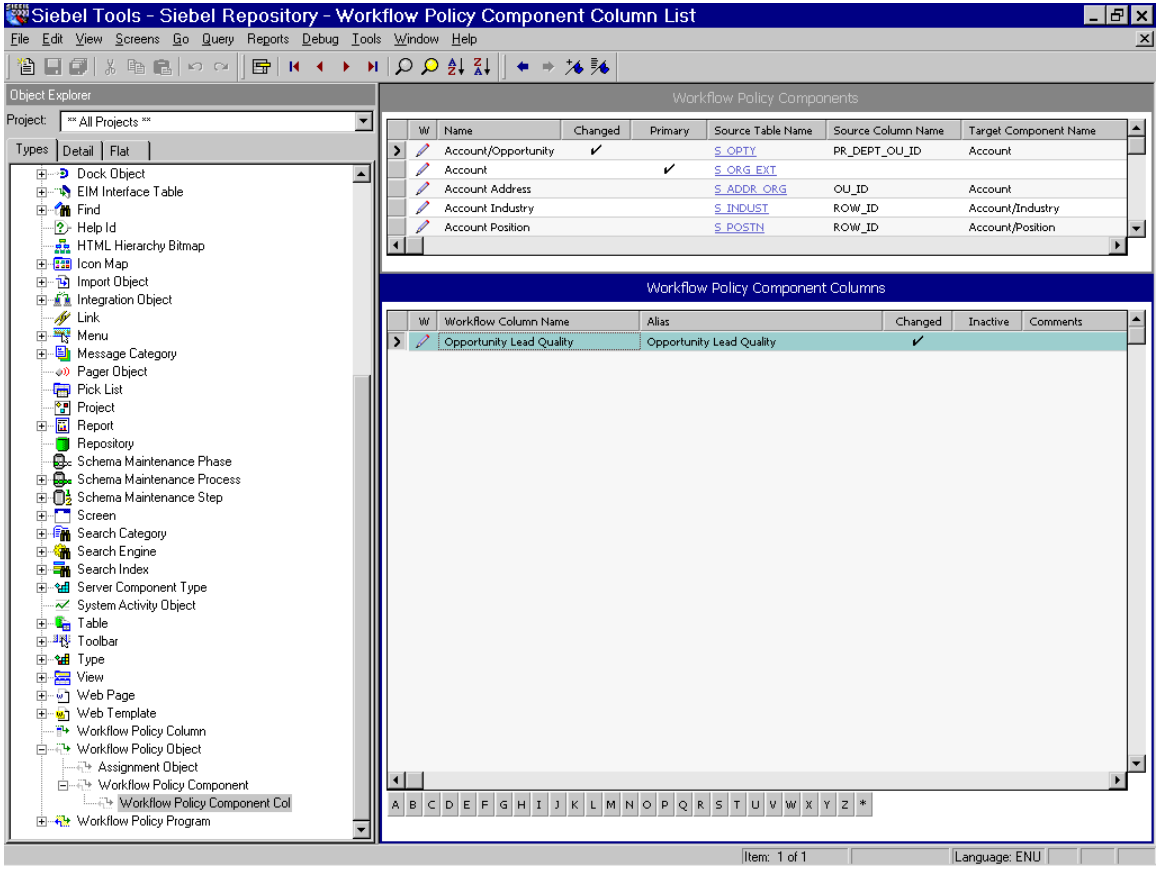


Figure 23. Mapping Workflow Policy Components to Assignment Criteria

Phase 3: Mapping the Workflow Policy Component to the Assignment Attribute

After you map a column to the workflow policy component, you map the workflow policy component to the assignment attribute. In this example, you map the Account/Opportunity policy component to the Lead Quality Code assignment attribute.

To map the workflow policy component to the assignment attribute

1. In the Object Explorer, select the Assignment Attribute object.
2. In the Assignment Attributes window, select Lead Quality Code.
3. In the Object Explorer, expand the Assignment Attribute object and select the Assignment Attribute Column object.
4. In the Assignment Attribute Columns window, choose Edit > New Record.
5. Enter information in the fields for the new record using the following steps:
   a. In the Name field, type the name of the assignment attribute column.

      For this example, type `Account: Lead Quality`.

   b. In the Assignment Object field, select the assignment object to which candidates are assigned for the assignment rule.

      For this example, select Account.

   c. In the Workflow Policy Component field, select the workflow policy component to map to this assignment attribute.

      For this example, select Account/Opportunity.

   d. In the Workflow Policy Component Column field, select the workflow policy component column to map to this assignment attribute.

      For this example, select Opportunity Lead Quality.

   e. In the Sequence field, specify the sequence of this assignment attribute.

      For this example, type `2`.

6 Update the siebel.srf file and run various server administration tasks.

For instructions on updating your deployment with the new configurations, see "Server Administration After Configuration" on page 153.

NOTE: You must recompile the siebel.srf file whenever you add, inactivate, or delete any assignment object types, assignment criteria, and assignment attributes. Make sure all projects are recompiled—not only the locked projects—if you inactivate or delete a top-level object type or assignment criteria. For more information on when to recompile the siebel.srf file, see Table 16 on page 153.

Figure 24 shows an example of mapping the Account/Opportunity workflow policy component to the Opportunity: Lead Quality assignment attribute.

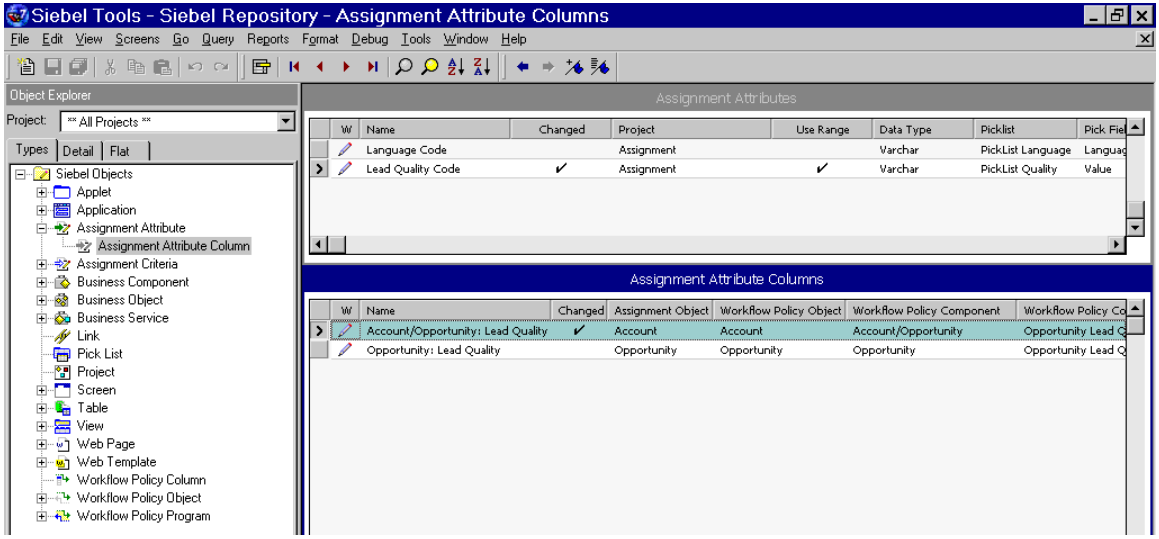


Figure 24. Mapping Workflow Policy Components to Assignment Attributes

Phase 4: Administration Tasks After Configuration

After the workflow policy component is mapped to the assignment attribute, the siebel.srf file must be updated and various server administration tasks run. To make sure your configurations are recognized, complete steps in "To update your deployment with new configurations" on page 154.

Workflow Policy Components Inactivated by Default

The Workflow Policy Components, shown in Table 15 for the Opportunity Workflow Policy Object, are inactivate by default for Assignment Manager.

Table 15. Inactive Assignment Manager Workflow Policy Components

Workflow Policy Object	Workflow Policy Component
Opportunity	Indirect Account
Opportunity	Indirect Account Address
Opportunity	Indirect Account Industry
Opportunity	Indirect Account Primary Address
Opportunity	Indirect Account Synonym
Opportunity	Indirect Account/Industry
Opportunity	Opportunity/Indirect Account
Opportunity	Primary Account Address

If these Workflow Policy Components are required for your deployment, activate the components by following the procedures in "Defining a Workflow Policy Component" section of *Siebel Business Process Designer Administration Guide*.

Server Administration After Configuration

After configuring Assignment Manager objects and attributes, it is often necessary to recompile the .srf file and restart various server components and tasks. Table 16 summarizes the required administration tasks based on the type of configuration process.

CAUTION: You must recompile the siebel.srf file whenever you add, inactivate, or delete any assignment object types, assignment criteria, and assignment attributes. Make sure all projects are recompiled—not only the locked projects—if you inactivate or delete a top-level object type or assignment criteria.

Table 16. Summarization of Server Administration After Configuration

Configuration Process	Compile .srf File	Restart Assignment Manager	Regenerate Triggers	Restart Workflow Monitor Agent (for dynamic assignment)
Add, inactivate, or delete assignment objects	Yes	Yes	Yes	Yes
Configure assignment objects	No	Yes	Yes	Yes
Add, configure, inactivate, or delete assignment attributes	Yes	Yes	Yes	Yes
Configure assignment attribute columns	No	Yes	Yes	Yes
Add, configure, inactivate, or delete assignment criteria	Yes	Yes	Yes	Yes
Add, configure, inactivate, or delete assignment criteria attributes	Yes	Yes	Yes	Yes

Use the following procedure to update your deployment with new configurations.

NOTE: Some steps may not be required for your particular deployment. See Table 16 on page 153 and the particular procedure for the necessary steps.

To update your deployment with new configurations

1. Compile changes to the siebel.srf file, if necessary, and deploy it to the server.
   a. Choose Tools > Compile Projects.
   b. In the Object Compiler dialog box, select the project (or projects) you want to compile.

      NOTE: For the procedures provided in this chapter, select either the Assignment, or the Assignment (SSE) project, or both.

   c. Select the Siebel client repository file (default is siebel.srf) located in the Objects subdirectory within the Siebel client root directory.
   d. Click Compile.

   For more information on when to recompile the siebel.srf file, see Table 16 on page 153 and *Siebel Tools Reference*. For information on distributing the siebel.srf file, see *Siebel Anywhere Administration Guide*.

   NOTE: It is not necessary to recompile the siebel.srf file whenever you configure an assignment object or an assignment attribute column, but you must recompile the siebel.srf file whenever you add, inactivate, or delete any assignment object types, assignment criteria, or assignment attributes.

   Make sure all projects are recompiled—not only the locked projects—if you inactivate or delete a top-level object type or assignment criteria.

2. If you are running dynamic assignment, perform the following steps:
   a. Stop the Workflow Monitor Agent server component.

b Regenerate triggers by running the Generate Triggers server component.

c Release assignment rules (if rules have changed) by clicking Release in the Assignment Rules view.

For more information on releasing assignment rules, see "Releasing Assignment Rules" on page 202.

d Restart the Workflow Monitor Agent server component.

For more information on stopping and restarting server components, see *Siebel Server Administration Guide*.

3 If your are running dynamic assignment, stop and restart the Assignment Manager server component for the changes to take effect.

a Stop the Workflow Monitor Agent server component.

b Stop the Assignment Manager server component.

c Start the Assignment Manager server component.

d Start the Workflow Monitor Agent server component.

For more information on stopping and restarting server components, see *Siebel Server Administration Guide*.

NOTE: You must stop and restart the Assignment Manager server component whenever you add, inactivate, or delete any assignment object types, assignment criteria, or assignment attributes.

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4 Assignment Rules

This chapter provides a procedure for activating assignment rules and explains how to define and use assignment rules in the Siebel client.

NOTE: Even if you intend to use predefined assignment objects, you must define assignment rules by completing the tasks in this chapter.

Activating Assignment Rules

Assignment Manager comes with predefined assignment rules. If you plan to use these predefined rules, you must activate them first. To activate these rules, use the following procedure.

To activate an assignment rule

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Rules.
2. In the Assignment Rule list, select an assignment rule.
3. In the Expiration field, either null the existing value or set the value to a later date.

Defining Assignment Rules

To define and use assignment rules, you need to perform the following tasks in the Siebel client:

- Create the assignment rule.

  For more information, see "Creating Assignment Rules" on page 161.

- Create assignment rule groups.

  For more information, see "Creating Assignment Rule Groups" on page 165.

- Create key server mappings.

  For more information, see "Defining Server Key Maps" on page 168.

- Create assignment criteria.

  For more information, see "Creating Criteria Values" on page 174 and "Creating Criteria Values as Skills with Expertise Codes" on page 177.

- Create criteria values (optional when using the Compare Object to Person comparison method).

  For more information, see "Creating Criteria Values" on page 174and "Creating Criteria Values as Skills with Expertise Codes" on page 177.

- Create the assignment workload (optional).

  For more information, see "Defining Assignment Workload" on page 182.

- Assign employees, positions, or organizations to the assignment rule (optional if All People is checked).

  For more information, see "Adding Employees, Positions, and Organizations to Assignment Rules" on page 189.

- Release the assignment rule.

  For more information, see "Releasing Assignment Rules" on page 202.

The following sections explain how to perform each of these tasks using the Assignment Administration views. The sections are organized to present information in a sequence roughly corresponding to the order in which you are likely to be concerned with the subjects described when defining new assignment rules.

Creating Assignment Rules

This section explains how to create assignment rules. For more information on assignment rules, see "Assignment Rules" on page 23.

To create assignment rules

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Rules.
2. In the Assignment Rules list, click New.
3. In the new record, click in the available fields to enter relevant information for the new rule.

Table 17 shows the predefined fields.

Table 17. Assignment Rule Fields

Field	Description	Example
Activation[1]	Start date of the assignment rule.	
All Organizations	If selected, evaluates all organizations in the Siebel database as candidates for this assignment rule. However, individual organizations and attributes associated with the rule are ignored. For more information, see the "Minimum Score" description in this table.	
All People	If selected, evaluates all employees or positions in the Siebel database as candidates for this assignment rule. However, individual people and attributes associated with the rule are ignored. For more information, see the "Minimum Score" description in this table.	
Assignees from Rule	Methods used by Assignment Manager to determine which potential assignees are assigned. For explanations of each method, see Table 4 on page 24. This is a required field.	One, Best Fit

Table 17. Assignment Rule Fields

Field	Description	Example
Check Calendar	If selected, activates Assignment Manager to check employees' calendars when determining assignment eligibility. Used only for employee-based objects.	
Comments	Type in your comments here.	
Exclusive	If selected, candidates for this assignment rule supersede candidates that qualified for any other non-exclusive assignment rules. For more information on the use of the exclusive feature with scoring, see Step 8 on page 57 in the "Assignment Methodology" section.	
Expiration[1]	End date of the assignment rule.	
Minimum Score	Minimum score required for candidates to qualify for this assignment rule. Note: You cannot run assignment rules for specific candidates and also designate one of the All flags (All Organizations or All People) for that assignment rule. This is because the two settings are mutually exclusive functionalities. If the All Organizations or All People flags or both flags are checked, then individual organizations or people associated with the rule are ignored. None of the attributes set for that organization or people associated with the rule are considered.	
Name	Name of the assignment rule.	High Priority Modem Service
Object	Objects applied to this rule. If no objects are specified, then all objects are applied to this rule.	Service Request

Table 17. Assignment Rule Fields

Field	Description	Example
Primary Employee	Primary employee for this assignment rule. Typically used for service-related assignments. Applicable only if this employee is included for the assignment rule. If the Assignee from Rule type is One, Best Fit, then do not select a primary employee, because the highest-scoring employee is still selected and the primary employee is ignored.	
Primary Organization	Primary organization for this assignment rule. Applicable only if this organization is included for the assignment rule. If the Assignee from Rule type is One, Best Fit, then do not select a primary organization, because the highest-scoring organization is still selected and the primary organization is ignored.	
Primary Position	Primary position for this assignment rule. Typically used for sales-related assignments. Applicable only if this position is included for the assignment rule. If the Assignee from Rule type is One, Best Fit, then do not select a primary position, because the highest-scoring position is still selected and the primary position is ignored.	
Rule Group	Assignment rule groups applied to this rule. For more information, see "Assignment Rule Groups" on page 25.	
Score	Score given to candidates who qualify for this assignment rule	20
Sequence	Sequence number for this rule. By default, assignment rules do not have a sequence number—one must be assigned by the administrator. For more information, see "Assignment Rule Sequencing" on page 26.	

1. Set the machine on which the assignment server resides to Greenwich Mean Time (GMT). For more information about GMT, see *Global Deployment Guide*.

Figure 25 shows an example of creating an assignment rule.

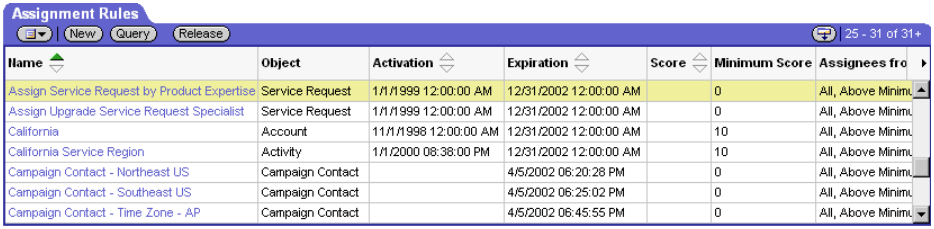


Figure 25. Example of Creating an Assignment Rule

Creating Assignment Rule Groups

This section explains how to create new assignment rule groups and how to view the assignment rules associated with a particular assignment rule group. For more information about assignment rule groups, see "Assignment Rule Groups" on page 25.

NOTE: An assignment rule does not have to be associated with a rule group. If you do not associate rule groups with any of your rules, and you do not specify a particular rule group for Assignment Manager to load at startup, then Assignment Manager, by default, loads all active rules into memory. For more information about running Assignment Manager, see Chapter 5, "Running Assignment Manager."

To create a new assignment rule group

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Rule Groups.
2. In the Assignment Rule Groups list, click New.
3. In the new record, click in the available fields to enter relevant information for the new group.
   a. In the Name field, enter a name for the assignment rule group.
   b. In the Description field, type in a description for the assignment rule group.

NOTE: When you create a new assignment rule, the assignment rule group field defaults to Default Group. For more information about the Default Group, see "Assignment Rule Groups" on page 25.

Table 18 shows the predefined fields.

Table 18. Assignment Rule Group Fields

Field	Description
Activation[1]	Start date of the assignment rule group. Note: By default, rules within a group inherit the activation date from the group date. However, if you specify an activation date for a particular rule, it overrides that date.
Description	A description of the rule group.
Expiration[1]	End date of the assignment rule group. Note: By default, rules within a group inherit the expiration date from the group date. However, if you specify an activation date for a particular rule, it overrides that date.
Key Based	Indicates the rule group is intended for key-based routing and usually has a corresponding server key mapping. By checking this flag, even if there is no server key mapping defined for the rule group, this makes sure that the rules that belong to this rule group are not processed when running the assignment server in Default Group mode. For more information about key-based routing and server key maps, see "Server Key Maps" on page 29. For more information about the Default Group, see "Assignment Rule Groups" on page 25. Note: The Key Based field may be a hidden column on the Assignment Rule Groups list. You can enable the Key Based field by selecting it through the Columns Displayed feature.
Name	Name of the assignment rule group.

1. Set the machine on which the assignment server resides to Greenwich Mean Time (GMT). For more information about GMT, see *Global Deployment Guide*.

Figure 26 shows an example of creating an assignment rule group.

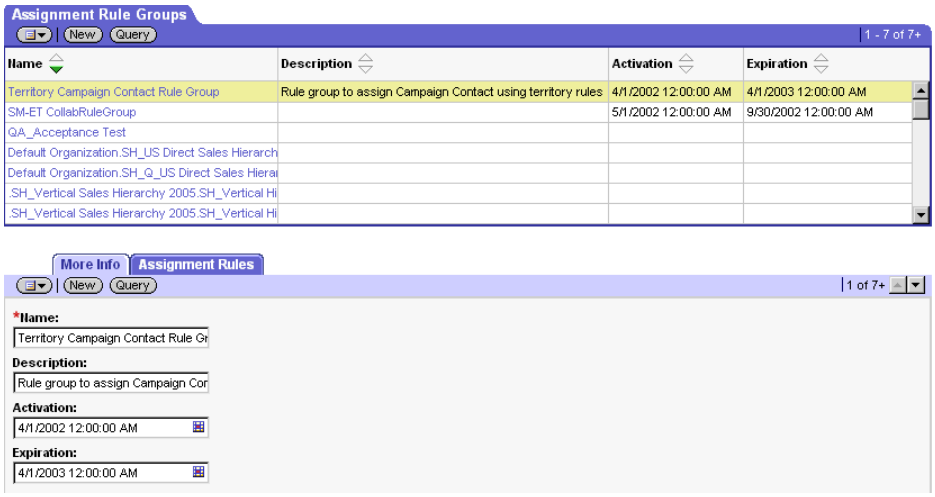


Figure 26. Example of Creating an Assignment Rule Group

Defining Server Key Maps

This section explains how to define new server key maps. For more information about server key mapping, see "Server Key Maps" on page 29. For more information about running Assignment Manager using server key maps, see "Running Assignment Manager in Interactive Mode" on page 216.

To define a new server key map

1. From the application-level menu, choose View > Site Map > Assignment Administration > Server Key Map.
2. In the Assignment Server Key Mappings list, click New.
3. In the new record in the More Info form, click in the available fields to enter relevant information.
   a. In the Siebel Server field, enter a server name.
   b. In the Assignment Rule Group field, select an assignment rule group.

Table 19 shows the predefined fields.

Table 19. Server Key Map Fields

Field	Description
Assignment Rule Group	A group of assignment rules associated with a particular instance of Assignment Manager. For more information, see "Assignment Rule Groups" on page 25.
Siebel Server	The name of the Siebel Application Server that is running that instance of Assignment Manager. For more information, see *Siebel Server Administration Guide*.

Figure 27 shows an example of creating a new server key map.

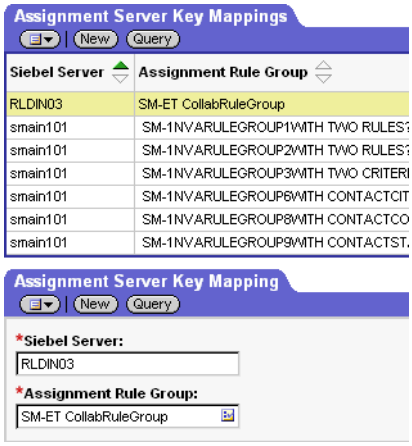


Figure 27. Example of Defining a New Server Key Map

Defining Assignment Rule Sequences

This section explains how to define sequences for assignment rules. For more information about assignment rule sequences, see "Assignment Rule Sequencing" on page 26.

NOTE: You can use sequencing even if you are not using rule groups. However, if some of the rules in the group have sequence numbers and others do not, the rules with no specified sequence number are considered to have a sequence number of 0 and are evaluated first. Therefore, you should give every rule a sequence number if you use sequencing.

To define a sequence for an assignment rule

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Rules.
2. In the Assignment Rules list, select the assignment rule for which you want to define rule sequencing.
3. In the Sequence field in the More Info form, enter a sequence number.

Figure 28 shows an example of an assignment rule with a sequence number of 2.

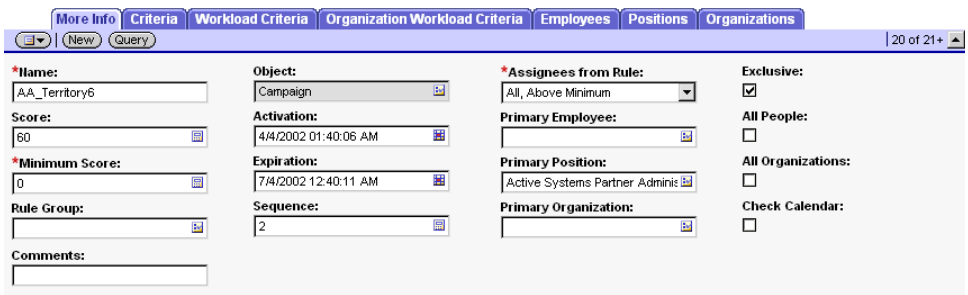


Figure 28. Example of an Assignment Rule with a Sequence

Creating Assignment Criteria

This section explains how to create assignment criteria for assignment rules. For more information on assignment criteria, see "Assignment Criteria" on page 32.

NOTE: Assignment rules can be created with no criteria. A rule of this nature functions to make sure data items of a particular type are assigned, that is, objects of the defined type pass. Use these rules carefully as a rule defined with no criteria can make assignments that are not required. Although assignment criteria are not required for an assignment rule, assignment rules with no criteria and no assignment object specified are ignored by Assignment Manager.

To create assignment criteria

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Rules.
2. In the Assignment Rules list, select the assignment rule for which you want to create assignment criteria, and then click the Criteria view tab.
3. In the Criteria list, click New.
4. In the new criterion record, click in the available fields to enter the relevant information.

NOTE: If you want to query for an assignment criteria, you must use the name of the assignment criteria, not the display name. For example, if the name of the Account assignment criteria is ACCOUNT_ID, then you must use this name for your query, although the display name is Account. The queries for seed assignment criteria must also be made with their English names, that is, these queries do not accept non-English characters.

Table 20 shows the predefined fields.

Table 20. Assignment Criteria Predefined Fields

Field	Description	Example
Comments	Type your comments here.	
Comparison Method	Methods used by Assignment Manager to determine how objects and candidates are matched. For explanations of each method, see Table 6 on page 32.	Compare to Object
Criteria	Type of assignment criteria.	Product Defect Priority
Inclusion	Methods used by Assignment Manager to determine how criteria values and candidates are matched. For more information on inclusion methods, see Table 7 on page 34.	Include
Minimum Score	Minimum score required to qualify for this criteria.	
Required	Determines whether the criteria is required. For required criteria, candidates must meet all conditions of the criteria to qualify for the assignment rule. There are three choices: Always, Never, and When Available.	Always
Score	Score for this criteria. Candidates that satisfy this criteria have this score added to their total score.	

Figure 29 shows an example of creating assignment criteria using values from Table 20. This example creates a required Product Defect Priority assignment criteria for an assignment rule that is compared to service objects.

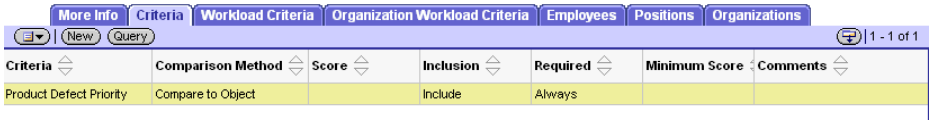


Figure 29. Example of Creating Assignment Criteria

Creating Criteria Values

This section explains how to create criteria values. Each assignment criteria uses different predefined criteria values. You determine the number of criteria values and define each value by setting assignment attributes (shown as fields in the Values list applet). For more information on criteria values, see "Criteria Values" on page 41.

NOTE: Only assignment criteria that use the Compare to Object, Compare to Person, or Compare to Organization comparison methods use criteria values. Criteria value scores are calculated only for criteria that use the Include inclusion method.

To create criteria values

1. With the appropriate assignment criterion selected in the Criteria list (View > Site Map > Assignment Administration > Assignment Rules > Criteria), scroll down to the Values list.
2. In the Values list, click New.
3. In the new record, click in the available fields to enter the relevant information.

   NOTE: The assignment attributes for criteria values that are available differ depending on the assignment criterion you select in Step 1.

Table 21 shows examples of assignment attributes for the assignment criteria created in the last section.

Table 21. Available Assignment Attributes

Criteria Value	Example
Score	10 5
Product Defect Priority	1—Very High 2—High

NOTE: It is possible to create duplicate criteria values for an assignment criteria. If both criteria values use scores in this case, then both scores are added to the assignment criteria if the criteria value passes. This can happen when you create criteria values that use ranges (such as criteria values for the Revenue assignment criteria).

Wildcard characters can also be used when defining specific criteria values. This option allows for a greater range of assignment object matches. For example, if you create an assignment rule for Account objects with the Account City as assignment criteria, the corresponding criteria value City can be defined as A*. This setting matches Accounts in cities beginning with the letter A.

If a criteria value includes special characters “?”, “*”, and “\” that are used as literals, the escape identifier character (\) must be added before the special character in the value field. For example, the criteria value Tri*Laptop is entered into the Values field as Tri*Laptop.

Criteria values that include alphanumeric entries are stored as string values. These values are sorted lexicographically, that is, in dictionary order, when determining specific ranges for assignment rules. For example, the value AB10 is sorted between AB1 and AB9 even though you may require AB10 placed greater than AB9.

Figure 30 shows an example of creating a Product Defect Priority criteria value using the procedure "To create criteria values" on page 174 and the values in Table 21 on page 175.

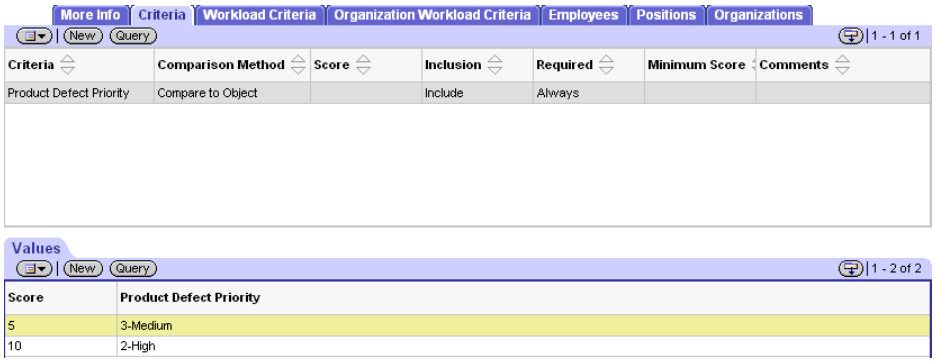


Figure 30. Example of Creating Criteria Values

Creating Criteria Values as Skills with Expertise Codes

Creating criteria values as skills with expertise codes is a preconfigured feature of assignment criteria values and works with assignment rules for service objects (or any object configured to use skills). Creating skills is similar to creating criteria values. This section explains how to create skills with expertise codes and how to use weighting factors for the skills that you create by describing the following tasks:

- "Creating Expertise Codes" on page 178
- "Defining Weighting Factors" on page 179

For more information on creating assignment criteria values, see "Creating Criteria Values" on page 174.

Figure 31 shows an example of creating a required Product Line Wildcard assignment criterion that is compared to candidates. This criterion requires a minimum score of 10 and the modem product skill with an expertise level of intermediate or better.

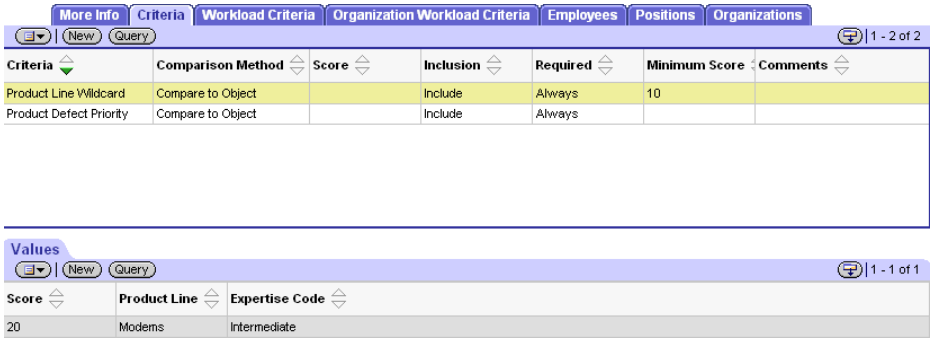


Figure 31. Example of Creating a Skill with an Expertise Code

In this example, only candidates with an intermediate or expert expertise qualify for this skill and receive 20 points.

Creating Expertise Codes

When defining a criteria value as a skill, select the desired expertise code from the Expertise Code field. For more information on skills, see "Skills" on page 46.

To create expertise codes, use the procedure in this section. For more information on expertise codes, see "Expertise Codes" on page 47.

CAUTION: You should perform the procedures in this section only if the default expertise codes (novice, intermediate, and expert) do not meet the requirements of your organization.

To create expertise codes

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. In the List of Values list, click New.
3. In the new record, click in the fields to enter the relevant information for the expertise code.
   a. In the Type field, click the select button, query for EXPERTISE_CD in the Pick Value Type dialog box, and then click OK.
   b. In the Display Value field, type the name of the expertise code as you want it to appear.
   c. In the Language-Independent Code field, type in the exact value that you entered in Step b.
   d. In the Language Name field, click the select button to select the appropriate language in the Pick Language Name dialog box, and then click OK.
   e. In the Translate field, click to place a check mark (if not already checked).

f In the Order field, type a numerical value for the rank of the expertise code.

The numerical value you type in this field determines the rank of the expertise code. Use a higher value to apply a greater rank to the expertise code, and a lower value to apply a lesser rank.

The new expertise value appears in the List of Values list and also becomes a valid expertise code selection in the criteria value drop-down menu when defining skills.

For information on multilingual list of values (MLOV), see *Siebel Tools Reference*.

Figure 32 shows an example of creating a Manager expertise code that is ranked higher than the default expertise codes.

List of Values

New | Query | Clear Cache | 1 - 4 of 4

Display Value	Language-Independent Code	Language Name	Parent LIC	Order	Active	Translate
Manager	Manager	English-American		40	✓	✓
Expert	Expert	English-American		30	✓	✓
Intermediate	Intermediate	English-American		20	✓	✓
Novice	Novice	English-American		10	✓	✓

Figure 32. Example of Creating Expertise Codes

Defining Weighting Factors

If you use weighting factors to weigh the expertise codes, candidates with different expertise receive different scores. For example, if you use the weighting factors described in Table 9 on page 49:

- Candidates who possess an intermediate expertise in the modem product skill receive 20 points and qualify for this criterion.
- Candidates who possess an expert expertise receive 10 points and qualify for this criterion.
- Candidates who possess a novice expertise fail this criteria (because an expertise level of intermediate or better is required), and fail the assignment rule (because the criterion is required).
- Candidates who possess an intermediate expertise are thus favored, because they receive a higher score.

This section explains how to define weighting factors to weigh skill scores. For more information on weighting factors, see "Weighting Factors" on page 48. For information on defining skills for objects, employees, positions, and organizations, see *Applications Administration Guide*.

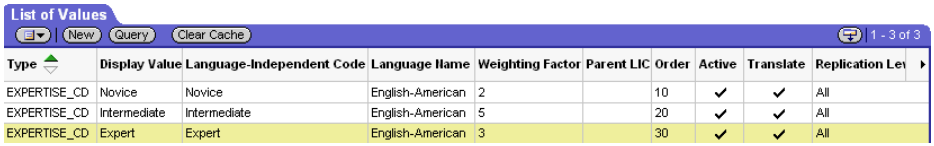
To define weighting factors

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. Display the list of values of type EXPERTISE_CD.
   a. In the List of Values list, click Query.
   b. In the Type field, click the select button.
   c. In the Pick Value Type dialog box, query for EXPERTISE_CD, click Go, and then click OK.
   d. In the List of Values list, click Go to complete the query.
3. For each of the resulting display values (default values are Novice, Intermediate, and Expert), click in the Weighting Factor field and type in a numerical value.

   The numerical value you type in this field, relative to the maximum weighting value defined, represents the percentage applied to the skill score.

NOTE: If the Weighting Factor field is not visible when the List of Values appear, use the Columns Displayed feature to make it visible (right-click, select Columns Displayed, use the arrows to move Weighting Factor from Available Columns to Selected Columns, and then click Save).

Figure 33 shows an example of defining the weighting factors for the default expertise codes using the values listed in Table 9 on page 49.


List of Values

New | Query | Clear Cache | 1 - 3 of 3

Type	Display Value	Language-Independent Code	Language Name	Weighting Factor	Parent LIC	Order	Active	Translate	Replication Lev
EXPERTISE_CD	Novice	Novice	English-American	2		10	✓	✓	All
EXPERTISE_CD	Intermediate	Intermediate	English-American	5		20	✓	✓	All
EXPERTISE_CD	Expert	Expert	English-American	3		30	✓	✓	All

Figure 33. Example of Defining Weighting Factors

Defining Assignment Workload

This section explains how to create workload rules and define workload criteria. For more information on workload criteria, see "Workload Criteria" on page 43. Optionally, you can also create workload rules that can be used in workload criteria. After you have created your workload rules (or you can use the predefined workload rules instead), you can define workload criteria in assignment rules for employees and positions, or for organizations.

To create workload rules

1. From the application-level menu, choose View > Site Map > Assignment Administration > Workload Rules.

   NOTE: If you plan to use the predefined workload rules, skip to Step 4.

2. In the Workload Rules list, click New.
3. In the new record, click in the available fields to enter the relevant information for the workload rule.
   a. In the Name field, type a name for the workload rule.

b In the Assignment Object field, select the assignment object of the workload rule.

The following table shows the predefined workload rules:

Workload Rule Name	Assignment Object
Excellent Leads	Opportunity
Critical Service Requests	Service Request
Open Opportunities	Opportunity
Total Open Service Requests	Service Request

NOTE: The workload rule's assignment object must match the assignment rule's assignment object; otherwise, the assignment workload criteria is ignored or a runtime error occurs (dependent on the assignment rule assignment object's Ignore Extra Attributes runtime parameter setting).

4 With the appropriate workload rule selected, in the Workload Conditions view, click New.

5 In the new record, click in the available fields to enter the relevant information for the workload conditions.

a In the Field field, select a value to define the workload condition.

The fields that are available depend on the assignment object selected in Step 3 on page 182.

b In the Comparison field, select a comparison method.

NOTE: When specifying values for the comparison operands (LIKE, NOT LIKE, IN, NOT IN, and BETWEEN), the Value field must be in a form that the underlying database expects. For more information about comparisons, see *Siebel Business Process Designer Administration Guide*.

c In the Value field, select a value with which you want to compare the workload condition.

The values that are available depend on the workload condition selected in Step 3 on page 182.

NOTE: If the drop-down arrow does not appear when you select the Value field, you need to enter an appropriate value. For example, if you are creating a workload rule for an Opportunity object and using Position Id as the workload condition, you need to enter the physical ROW_ID of the positions.

NOTE: If the assignment object selected for the workload criteria is team-based, workload criteria using this workload rule should be associated with an assignment rule only if the workload rule object has the team table (or owner field) referenced by one of its workflow components.

Figure 34 shows an example of creating a workload rule called Example for the Account assignment object. The workload condition requires that the account state equal CA.

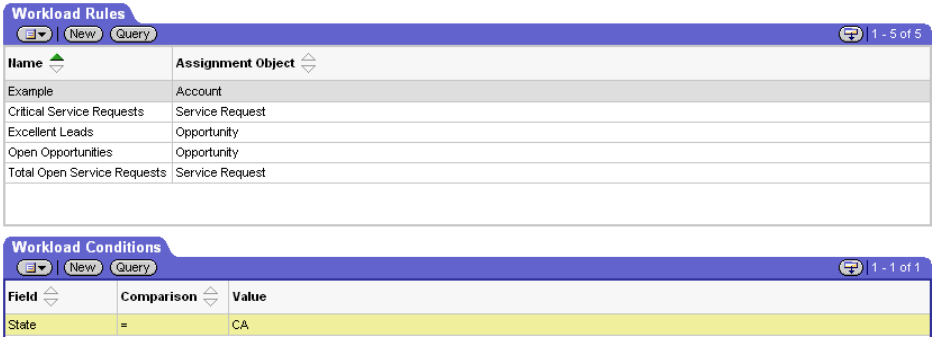


Figure 34. Creating Workload Rules

To define workload criteria for employees and positions

1 With the appropriate assignment rule selected (View > Site Map > Assignment Rules), click the Workload Criteria view tab.

2 In the Workload Criteria list, click New.

3 In the new record, click in the available fields and enter the relevant information.

Table 22 shows the available predefined fields.

Table 22. Workload Criteria Fields for Employees and Positions

Field	Description	Example
Assignment Object	Type of assignment object related to this workload rule.	Service Request
Comments	Type your comments here.	
Max Load	The maximum workload allowed for this workload rule. For more information on how this value affects the workload score, see "Workload Criteria" on page 43.	2
Required	Determines whether the workload rule is required for the assignment rule. Choices are: Always and Never. For more information, see "Assignment Criteria" on page 32.	
Score	Score to apply for this workload rule. For more information on workload scores, see "Workload Criteria" on page 43.	50
Workload Rule	Name of the workload rule to apply to the assignment rule. The Workload Rule should already be defined as shown in "To create workload rules" on page 182.	Total Open Service Requests

Figure 35 shows an example of defining a workload criteria for employees and positions using values specified in Table 22.

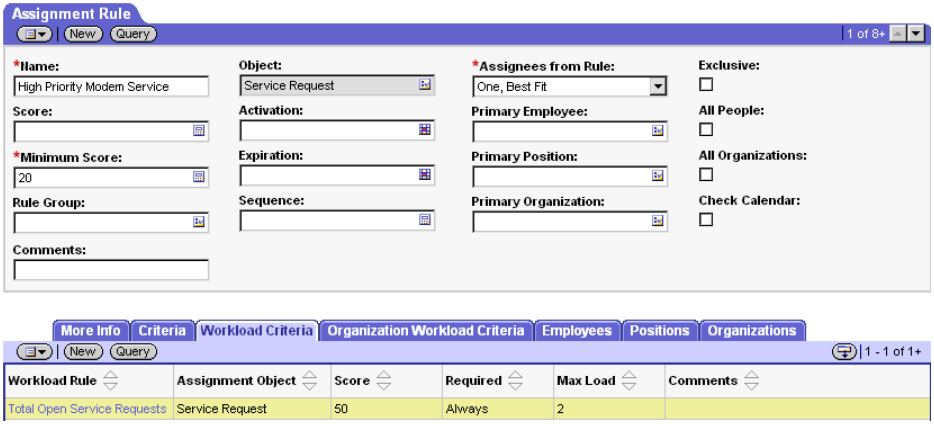


Figure 35. Example of Defining Workload Criteria for Employees and Positions

To define workload criteria for organizations

1. With the appropriate assignment rule selected (View > Site Map > Assignment Rules), click the Organization Workload Criteria view.
2. In the Organization Workload Criteria list, click New.
3. In the new record, click in the available fields and enter the relevant information.

Table 23 shows the available predefined fields.

Table 23. Workload Criteria Fields for Organizations

Field	Description	Example
Assignment Object	Type of assignment object related to this workload rule.	Opportunity
Comments	Type your comments here.	
Max Load	The maximum workload allowed for this workload rule. For more information on how this value affects the workload score, see "Workload Criteria" on page 43.	3
Required	Determines whether the workload rule is required for the assignment rule. Choices are: Always and Never. For more information, see "Assignment Criteria" on page 32.	
Score	Score to apply for this workload rule. For more information on workload scores, see "Workload Criteria" on page 43.	10
Workload Rule	Name of the workload rule to apply to the assignment rule. The workload rule should already be defined as shown in "To create workload rules" on page 182.	Excellent Leads

Figure 36 shows an example of adding a workload criteria for organizations using values specified in Table 23 on page 187.

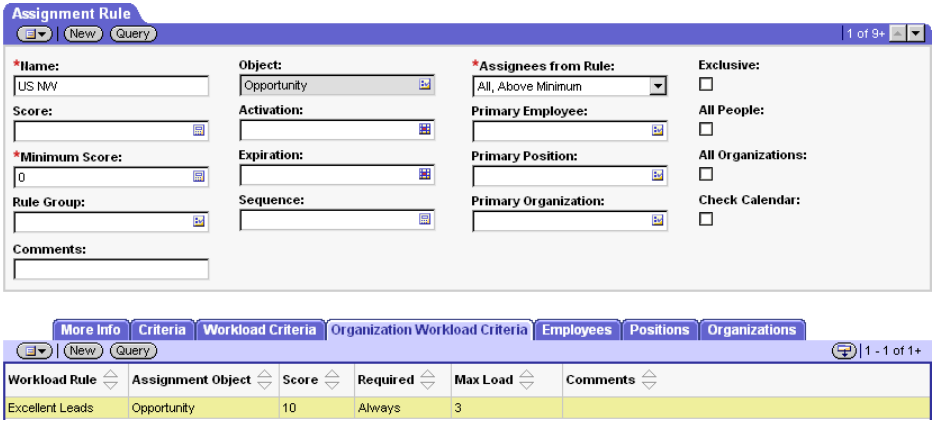


Figure 36. Example of Defining Workload Criteria for Organizations

Adding Employees, Positions, and Organizations to Assignment Rules

This section provides procedures for adding employees, positions, and organizations to assignment rules as follows:

- "Adding Employees to Assignment Rules"
- "Assigning Employees to Assignment Rules Based on Availability" on page 193
- "Adding Positions to Assignment Rules" on page 195
- "Adding Organizations to Assignment Rules" on page 199

For more information about employees, positions, and organizations, see "Candidates" on page 20. For information about assigning skills to employees, positions, and organizations, see "Assigning Skills to Employees, Positions, and Organizations" on page 68.

Adding Employees to Assignment Rules

This section explains how to add employees to an assignment rule. Service organizations typically add employees to objects. For more information on employees, see "Employees" on page 20.

NOTE: Assignment Manager does not prevent you from adding employees to an assignment rule that requires position assignment. Before adding employees, make sure that the objects for the assignment rule allow employee assignment.

To add employees to an assignment rule

1. With the appropriate assignment rule selected in the Assignment Rules view (View > Site Map > Assignment Administration > Assignment Rules), click the Employees view tab.
2. In the Employees list, click New.

3 In the Add Employees dialog box, select the employees to include for this assignment rule, and then click OK.

NOTE: To select multiple employees, hold down the CTRL key while selecting employees.

4 In the new record in the Employees list, click in the available fields to enter or edit the relevant information.

Table 24 shows select predefined fields available.

Table 24. Employees List Fields

Field	Description	Example
Activation Date/Time[1]	Start date of the assignment rule employee.	4/10/01 3:01:00 PM
Expiration Date/Time[1]	End date of the assignment rule employee.	4/10/01 3:01:00 PM
Score	An initial score for each employee is permitted in this field to differentiate between other employees for potential assignment.	20

1. Set the machine on which the assignment server resides to Greenwich Mean Time (GMT). For more information about GMT, see *Global Deployment Guide*.

Employees added to assignment rules are stored in a file called rulecache.dat. If new employees are added to an assignment rule, it is important to refresh the rulecache.dat file; otherwise, new employees are not recognized. For more information about the rulecache.dat file, see "Releasing Assignment Rules" on page 202.

NOTE: Assignment Manager caches employee skills in the rulecache.dat file when the Siebel Server is started. Every time rules are released, employee skills are updated and cached in the new rulecache.dat file that is created. If you want to automatically refresh employee skills and recreate the rulecache.dat file at a periodic interval, set the value of the AsgnSrvr component parameter to the desired interval of update. For more information about employee skills, see "Assigning Skills to Employees, Positions, and Organizations" on page 68. For information about the AsgnSrvr component parameter, see "Running Interactive Assignment Using the Command-Line SRVRMGR Utility" on page 218.

Figure 37 shows an example of adding employees.

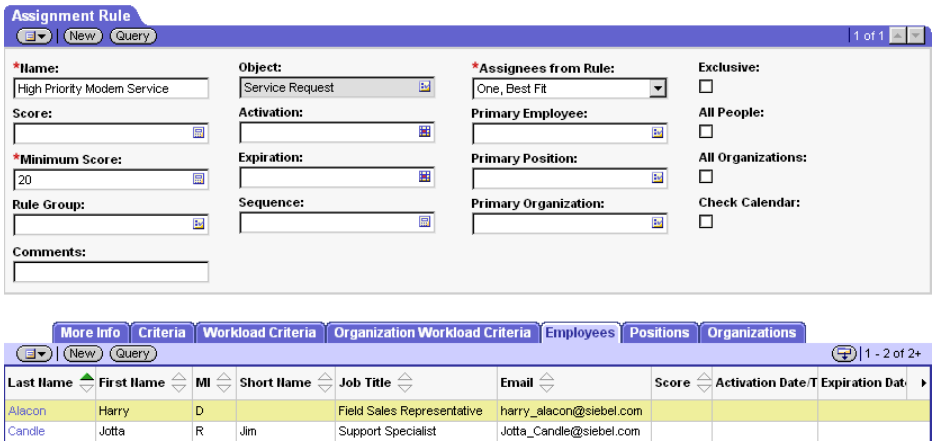


Figure 37. Example of Adding Employees

Assignment Manager can also assign employees based on their association with their parent organization. For example, only employees associated with a specific organization can be assigned to an assignment object even if other employees not associated with the organization qualify. This functionality is called multitiered assignment and must be configured for the appropriate assignment object. For more information on this feature, see "Multitiered Assignment" on page 52.

Assigning Employees to Assignment Rules Based on Availability

Assignment rules can be created for employee-based objects using availability-based assignment, which allows Assignment Manager to check an employee's calendar and to consider the employee's availability when determining assignment eligibility. Assignment objects must be preconfigured before using the assignment availability criteria feature. For more information on configuring assignment availability, see "Configuring Assignment Objects for Availability-Based Assignment" on page 107.

When an assignment object is configured for availability, a user specifies three times for the assignment object: an Early Start Time, a Must Start Time, and a Duration.

- Early Start Time is the earliest time the assignment object can be scheduled. (If this time is not specified, it defaults to the Must Start Time.)
- Must Start Time is the latest time that the assignment object can be started.
- Duration is the time in minutes required to finish the assignment object's task.

Each of these times is accessed by Assignment Manager when determining the availability of an employee. Assignment Manager then uses the availability information like other criteria when evaluating employees for the assignment object. Assignment Manager can also be configured to add an activity to the calendar of the employee who is assigned the assignment object. For example, if a service request is created with times indicating a service duration of four hours, Assignment Manager evaluates the object's times and employees' schedules, and selects only employees who are available for the four hours indicated by the service object. Assignment Manager then selects the highest scoring employee available and creates an activity for the employee (if the object is configured to assign activities). Employees can manually insert activities into their calendar to block assignments during specific periods. Similarly, an employee can delete activities created by the original assignment so further assignments can be made.

Assignment Manager functions for both single employees and teams. If an object is assigned to a team, every employee within the team is assigned an activity for the duration of the assignment (if the object is configured to assign activities). Assignment Manager can assign activities for the same object at different times based on the calendars of individual team members. A calendar activity, however, cannot be split up across multiple dates and times.

When administrators define a new rule, selecting the Check Calendar box on the Assignment Rules form activates the assignment availability criteria (see Figure 38).

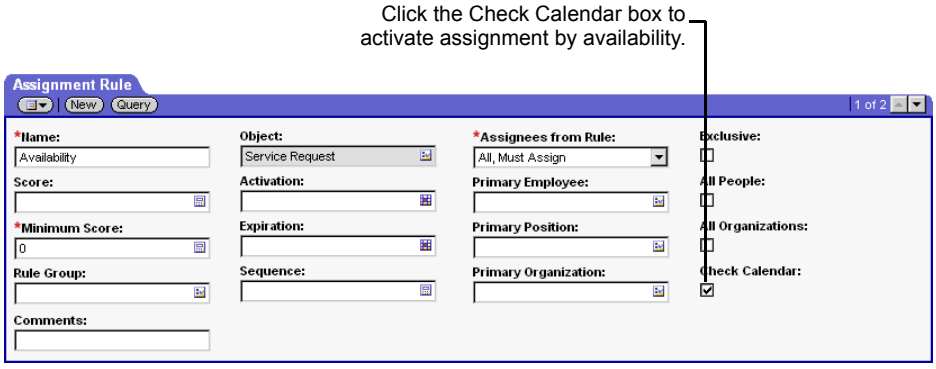


Figure 38. Check Calendar Box in the Assignment Rule Form

Adding Positions to Assignment Rules

This section explains how to add positions to an assignment rule. Sales organizations typically assign positions to objects. For more information on positions, see "Positions" on page 20.

NOTE: Assignment Manager does not prevent you from adding positions to an assignment rule that requires employee assignment. Before adding positions, make sure that the objects for the assignment rule allow position assignment.

To add positions to an assignment rule

1. With the appropriate assignment rule selected (View > Site Map > Assignment Administration > Assignment Rules), click the Positions view tab.
2. In the Positions list, click New.
3. In the Add Positions dialog box, select the positions to include for this assignment rule, and then click OK.

   NOTE: To select multiple positions, hold down the CTRL key while selecting positions.

   ---

4. In the new record in the Positions list, click in the available fields to enter or edit the relevant information.

Table 25 shows select predefined fields available for editing.

Table 25. Positions List Fields

Field	Description	Example
Activation Date/Time[1]	Start date of the assignment rule position.	4/10/01 3:01:00 PM
Expiration Date/Time[1]	End date of the assignment rule position.	4/10/01 3:01:00 PM
Score	An initial score for each position is permitted in this field to differentiate between other positions for potential assignment.	20

1. Set the machine on which the assignment server resides to Greenwich Mean Time (GMT). For more information about GMT, see *Global Deployment Guide*.

NOTE: You can configure Assignment Manager to define additional fields for Positions associated with an assignment rule. For more information, see "Configuring Assignment Objects to Copy Additional Columns to the Team Table" on page 266.

Figure 39 shows an example of adding a position for an assignment rule.

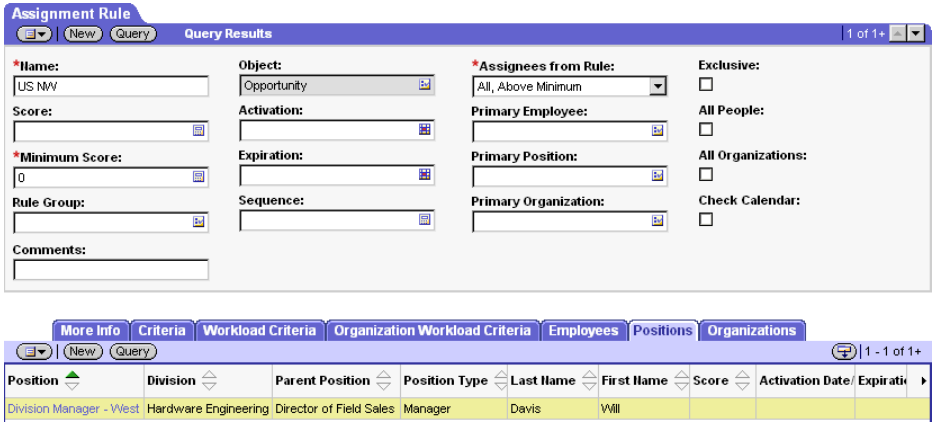


Figure 39. Example of Adding Positions

After you add positions for an assignment rule, only the active employees for each position are available. If Assignment Manager assigns the position, employees for the position have visibility to the assigned object.

To delete system-assigned positions from individual assignment objects, or to manually assign other positions, see the procedure in "Maintaining the Manually Assigned Primary Position" on page 261.

Positions assigned to assignment rules are stored in a file called rulecache.dat. If new positions are added to an assignment rule, it is important to refresh the rulecache.dat file; otherwise, new positions are not recognized. For further information, see "Releasing Assignment Rules" on page 202.

NOTE: Assignment Manager caches position skills in the rulecache.dat file when the Siebel Server is started. Every time rules are released, position skills are updated and cached in the new rulecache.dat file that is created. If you want to automatically refresh position skills and recreate the rulecache.dat file at a periodic interval, set the value of the AsgnSrvr component parameter to the desired interval of update. For more information about position skills, see "Assigning Skills to Employees, Positions, and Organizations" on page 68. For information about the AsgnSrvr component parameter, see "Running Interactive Assignment Using the Command-Line SRVRMGR Utility" on page 218.

Assignment Manager can also assign positions based on their association with their parent organization. For example, only positions associated with a specific organization can be assigned to an assignment object even if other positions not associated with the organization qualify. This functionality is called multitiered assignment and must be configured for the appropriate assignment object. For more information on this feature, see "Multitiered Assignment" on page 52.

Adding Organizations to Assignment Rules

This section explains how to add organizations to an assignment rule. For more information on organizations, see "Organizations" on page 21.

To add organizations to an assignment rule

1. With the appropriate assignment rule selected (View > Site Map > Assignment Administration > Assignment Rules), click the Organizations view tab.
2. In the Organizations list, click New.
3. In the Add Organization dialog box, select the organizations to include for this assignment rule, and then click OK.

   NOTE: To select multiple organizations, hold down the CTRL key while selecting organizations, and click OK.

4. In the new record in the Organizations list, click in the available fields to enter or edit the relevant information.

Table 26 shows select predefined fields available for editing.

Table 26. Organizations List Fields

Field	Description	Example
Activation Date/Time[1]	Start date of the assignment rule organization.	4/10/01 3:01:00 PM
Expiration Date/Time[1]	End date of the assignment rule organization.	4/10/01 3:01:00 PM
Score	An initial score for each organization is permitted in this field to differentiate between other organizations for potential assignment.	20

1. Set the machine on which the assignment server resides to Greenwich Mean Time (GMT). For more information about GMT, see *Global Deployment Guide*.

Figure 40 shows an example of adding an organization to an assignment rule.

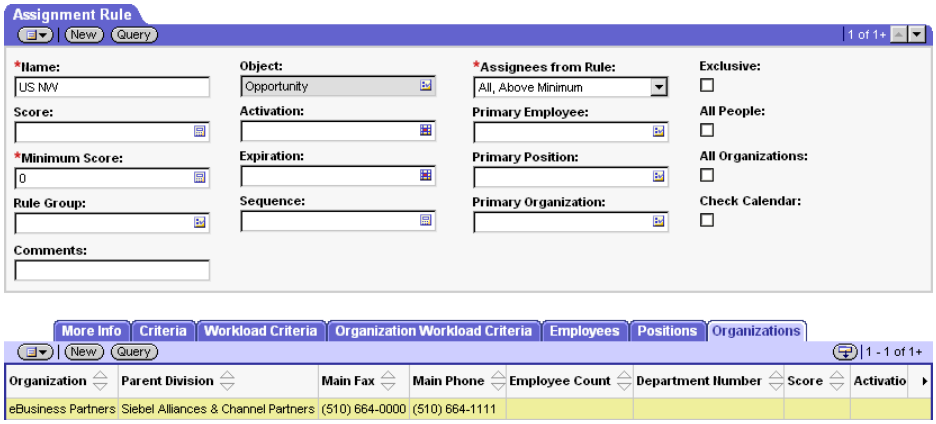


Figure 40. Example of Adding Organizations

Organizations added to assignment rules are stored in a file called rulecache.dat. If new organizations are added to an assignment rule, it is important to refresh the rulecache.dat file; otherwise, new organizations are not recognized. For further information, see "Releasing Assignment Rules" on page 202.

NOTE: Assignment Manager caches organization skills in the rulecache.dat file when the Siebel Server is started. Every time rules are released, organization skills are updated and cached in the new rulecache.dat file that is created. If you want to automatically refresh organization skills and recreate the rulecache.dat file at a periodic interval, set the value of the AsgnSrvr component parameter to the desired interval of update. For more information about position skills, see "Assigning Skills to Employees, Positions, and Organizations" on page 68. For information about the AsgnSrvr component parameter, see "Running Interactive Assignment Using the Command-Line SRVRMGR Utility" on page 218.

Assignment Manager can also assign organizations based on the positions associated within the organization. For example, positions assigned to an assignment object can also have their associated organizations assigned. This functionality is called multitiered assignment and must be configured for the appropriate assignment object. For more information on this feature, see "Multitiered Assignment" on page 52.

Alternatively, you can set a default organization for assignment objects. For example, if you want records for a given assignment object assigned to a certain organization, you can change the Default Org property on the assignment object using Siebel Tools. For more information about setting the Default Org property, see *Siebel Tools Reference*.

Releasing Assignment Rules

After you have created and defined assignment rules, you must release them to instruct Assignment Manager to use these rules. Releasing assignment rules also updates the rulecache.dat file, which includes information on employees, positions, and organizations available for assignment.

CAUTION: The following procedure releases all assignment rules simultaneously. Do not release assignment rules while associated server tasks are running.

To release assignment rules

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Rules.
2. In the Assignment Rules list, click Release.

   The assignment rules are released and the rulecache.dat file is updated.

NOTE: You can also refresh (update) the rule cache by deleting the rulecache.dat file (siebel_server\bin\rulecache.dat) and restarting the Siebel Server.

When a new Siebel Server is installed—for instance, as part of an upgrade—pending assignment rules are released (the rule cache is recreated) on the first startup. It is recommended that you release assignment rules after installation so that servers in the deployment recreate the same rule cache.

Migrating Assignment Rules

You use Siebel Enterprise Integration Manager (EIM) to migrate assignment rules from one system to another, such as from a test environment to a production environment. For more information about migration, see *Siebel Enterprise Integration Manager Administration Guide*.

If you add or change assignment objects, assignment attributes, or assignment criteria, you must also migrate the repository to the server production database. For information on migrating the repository, see *Siebel Tools Reference*.

5 Running Assignment Manager

This chapter explains how to run Assignment Manager in the following modes:

- Interactive (see "Running Assignment Manager in Interactive Mode" on page 216)
- Dynamic (see "Running Assignment Manager in Dynamic Mode" on page 220)
- Mobile (see "Running Assignment Manager in Mobile Mode" on page 235)
- Batch (see "Running Assignment Manager in Batch Mode" on page 236)

NOTE: Assignment Manager uses many Siebel Server resources. It is recommended you monitor the Siebel Servers whenever Assignment Manager is invoked, especially if you run multiple instances at the same time. For more information about running multiple instances of Assignment Manager, see "Running Multiple Instances of Assignment Manager in Batch Mode" on page 246.

Before running Assignment Manager, you must already have created your assignment rules. For information on creating assignment rules, see Chapter 4, "Assignment Rules." You also need to perform several preparation tasks. For more information, see the next section, "Preparing to Run Assignment Manager" on page 207.

Assignment Manager obtains information required for operation from the following sources:

- The assignment rules and criteria as well as employees, positions, and organizations that are read from the rulecache.dat file.

  NOTE: If you want to automatically refresh skills without restarting the Assignment Manager component, set the value of the Refresh people skills interval component parameter to the desired update interval (the value must be greater than zero seconds). Then, when rules are released, Assignment Manager refreshes skills and recreates the rulecache.dat file at the periodic interval set. For more information about the Refresh people skills interval, see the MaxSkillsAge AsgnSrvr component parameter in Table 30 in "Running Interactive Assignment Using the Command-Line SRVRMGR Utility" on page 218.

- The run-time parameters of assignment objects and their properties, the list of values for the picklists, and employee skills from the database.
- The assignment rule groups, assignment rule sequences, and server key maps, given you have defined these features; otherwise, they are ignored.

Make sure the rulecache.dat file is updated (see "Releasing Assignment Rules" on page 202 for this procedure) and the .srf file is compiled with the latest configurations (see "Server Administration After Configuration" on page 153 or *Siebel Tools Reference* for information on this procedure) before running Assignment Manager.

Preparing to Run Assignment Manager

Before running Assignment Manager, you must first perform preparation tasks. These tasks include:

- "Checking the Assignment Manager and Server Request Broker Components" on page 208
- "Configuring the Assignment Manager Component" on page 209
- "Configuring Assignment Manager Event Logs" on page 212

In addition to the preparatory tasks, there are server administration requirements that should be addressed before running Assignment Manager. These include:

- "Server Administration Requirements for Assignment Modes" on page 214
- "Server Administration Requirements After Configuration" on page 215

Checking the Assignment Manager and Server Request Broker Components

Before running Assignment Manager, you must first make sure that the Siebel Server can start one or more multi-threaded assignment servers by checking the Assignment Manager and Server Request Broker components.

To check Assignment Manager and Server Request Broker components

1. From the application-level menu, choose View > Site Map > Server Administration > Servers.
2. In the Servers list, select the server on which the Assignment Manager and Server Request Broker components run, and then click the Server Components view tab.
3. In the Component State field in the Server Components list, verify the state of each of the following components:
   - Assignment Manager component is Online.
   - Server Request Broker component is Running.

NOTE: If these components are not in their required state, check the log file for errors, and then make the necessary corrections.

Configuring the Assignment Manager Component

Before running Assignment Manager, you should configure the Assignment Manager component to enhance its performance for your implementation by adjusting the appropriate parameters. Table 27 on page 210 shows the parameters you can change.

To configure the Assignment Manager component

1. From the application-level menu, choose View > Site Map > Server Administration > Components.
2. In the Name field in the Components list, select the Assignment Manager component, and make sure it is running on the correct server.
3. Click the Component Parameters view tab.
4. In the Component Parameters list, select the component parameters of interest, and adjust the values as required by your implementation to achieve optimal performance.
5. After you have determined the optimal settings, make sure that the MinMTServers parameter is set to a current value greater than 0, and then restart the Siebel Server.

   This starts the specified number of Assignment Manager components. For more information about starting and restarting the Siebel Server, see *Siebel Server Administration Guide*.

Table 27 shows the parameters used by Assignment Manager that you can change. For a list of predefined server components and generic parameters, see *Siebel Server Administration Guide*.

Table 27. Assignment Manager Component Parameters

Parameter Name	Parameter Alias	Data Type	Description	DefaultValue
Check version iterations	CheckVerIter	Integer	The lag time before the component checks if there is a change to the rules version, that is, when the Release button was pressed. One integer value equals ten seconds (minimum value is 1).	6
Default Tasks	DfltTasks	Integer	Default number of service tasks to start (server mode only).	0
Log txn only on change	LogTxnChgOnly	Boolean	Log transaction only when there is a net change in assignment (for example, sales team updated).	TRUE
Maximum MT Servers	MaxMTServers	Integer	Maximum number of active servers for a multi-threaded service.	1
Maximum Tasks	MaxTasks	Integer	Maximum number of running tasks for a service.	2
Minimum MT Servers	MinMTServers[1]	Integer	Minimum number of active servers for a multi-threaded service.	1

1. Applies only to the assignment server and other multi-threaded request-based servers.

The following bulleted points explain why you might want to configure some of the various Assignment Manager component parameters:

- **Check version iterations.** Changing this parameter to a small value, such as 1, reduces the potential for invalid assignment. For example, running Interactive Assignment before Assignment Manager detects that the Release button was recently pressed causes assignment based on the previous version of assignment rules. By having a small iteration value, Assignment Manager checks for a newer version of assignment rules more frequently. Test your deployment with this lower parameter value to make sure it does not interfere with any other database activity.

- **Maximum MT Servers.** This parameter controls the maximum number of Assignment Manager server processes that are running at any time (when MaxMTServers > MinMTServers). Generally, the default value is sufficient for most deployments as server processes and Assignment Manager have large resource requirements.
- **Maximum Tasks.** This parameter controls the maximum number of server threads that can run at any time. For Assignment Manager, this controls the maximum number of assignments that can be processed concurrently. The value of this parameter should be set to the maximum anticipated concurrent requests (dependent on your server's capabilities).
- **Minimum MT Servers.** This parameter controls the number of Assignment Manager server processes that are started when the Siebel servers starts up. If this value is set to zero, Assignment Manager is disabled. It is recommend to use the default value of one, as server processes and Assignment Manager have large resource requirements.

Configuring Assignment Manager Event Logs

Before running Assignment Manager, you can configure event logs to view results. The Assignment Manager, Batch Assignment, and Workflow Monitor Agent server components are configured to use events. For information on the event log system and viewing log files, see *Siebel Server Administration Guide*.

NOTE: The Trace Flags and Error Flags parameters are no longer used with Assignment Manager.

In addition to the events used for other server components, the Assignment Manager, Batch Assignment, and Workflow Monitor Agent server components use two specific events to log information related to assignments: Object Assignment and Rules Evaluation.

The Object Assignment event is used to trace assignment information. Setting the log level for this event type to 3 prints a list of assignment rules and candidates that pass.

The Rules Evaluation event is used to trace matching information. If you set the log level for this event type to 3, Assignment Manager prints a list of evaluated assignment rules and whether or not they passed. If you set the log level for this event type to 4, Assignment Manager prints a list of evaluated assignment rules and related criteria values, and whether or not they passed.

NOTE: You can set the log level of both event types to print a list with combined results. However, when assigning too many objects, these settings may create extremely large log files.

To set the log level of Assignment Manager events

1. From the application-level menu, choose View > Site Map > Server Administration > Components.
2. In the Components list, select the Assignment Manager, Batch Assignment, or Workflow Monitor Agent component, depending on which component you want to set a log level; make sure the selected component is running on the correct server.

3 Select the Component Event Configuration view tab.

4 In the Log Level field in the Component Event Configuration list, adjust the values as required by your implementation as follows:

   a Select Rules Evaluation; type in 3 if you want to print a list of assignment rules and candidates that passed

   b Select Object Assignment; type in:

   - 3 if you want to print a list of evaluated assignment rules and whether or not they passed
   - 4 if you want to print a list of evaluated assignment rules and related criteria values, and whether or not they passed

Figure 41 shows an example of setting the log level of event types for the Assignment Manager server component.

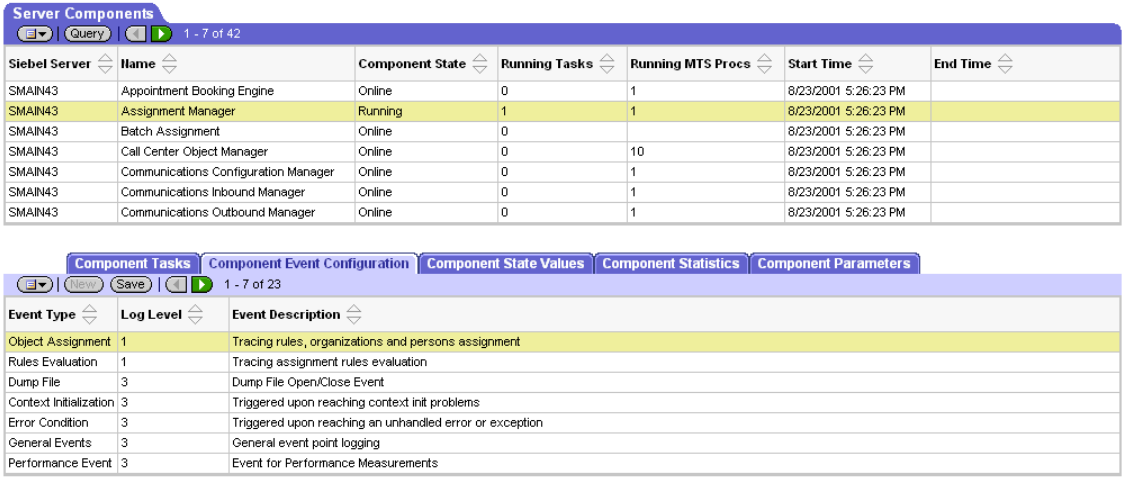


Figure 41. Configuring Event Logs for Assignment Manager

For more information on configuring event logs, see *Siebel Server Administration Guide*.

Server Administration Requirements for Assignment Modes

Assignment Manager requires various functioning server components and tasks based on the selected assignment mode. Table 28 summarizes the required server components and tasks that must be online or started when selecting a particular mode of assignment. When Mobile Assignment is selected, use the information provided for either Interactive or Dynamic Assignment based on your deployment requirements. Detailed information on starting these components and tasks is covered in the remainder of this chapter.

Table 28. Summarization of Server Requirements for Assignment Modes

Assignment Mode	Set Assignment Manager Online	Start Workflow Monitor Agent	Start Server Request Broker
Interactive Mode	Yes	No	Yes
Dynamic Assignment Mode	No[1]	Yes	No[1]
Batch Assignment Mode	No	No	No

1. This information is based on the default “Assignment Request (In Process)” seeded action.

Server Administration Requirements After Configuration

After configuring Assignment Manager objects and attributes or altering assignment policies, it is often necessary to stop and restart various server tasks and components. Table 29 summarizes the required server tasks and components that must be restarted based on the type of configuration process. For further information on Assignment Manager configuration, see Chapter 3, "Assignment Manager Configuration." Detailed information on how and when to run these server tasks and components is provided in the remainder of this chapter.

Table 29. Summary of Server Administration After Configuration

Configuration Process	Restart Assignment Manager	Regenerate Triggers	Restart Workflow Monitor Agent
Adding or configuring an assignment object, assignment attribute, or assignment criteria	Yes	Yes	Yes
Changing assignment policies	No	Yes	Yes
Activating or deactivating assignment policies	No	Yes	Yes

Running Assignment Manager in Interactive Mode

This section explains how to run Assignment Manager in interactive mode. Use Interactive Assignment to assign people in real time. The Activity and Service Request objects are predefined to use Interactive Assignment. This feature allows you to assign employees to activities and service requests in real time by clicking the Menu button and choosing Assign. You can also configure other assignment objects to use Interactive Assignment. For more information on Interactive Assignment, see "Interactive Assignment" on page 60. For more information on configuring assignment objects, see "Configuring Assignment Objects" on page 100.

You can run Interactive Assignment using the Siebel Dedicated Web Client, the Siebel Web Client (also known as zero footprint client), or the command-line SRVRMGR utility. The following subsections explain how to run Interactive Assignment for these environments:

- "Running Interactive Assignment for a Service Request—An Example" on page 217
- "Running Interactive Assignment Using the Command-Line SRVRMGR Utility" on page 218

NOTE: Before running Interactive Assignment using the Siebel Dedicated Web Client, it is recommended that you verify that the correct parameter settings exist in your Siebel client configuration (.cfg) file. The parameters identified in this configuration file specify the location of the Siebel Server where Assignment Manager is running and are automatically created during installation of the Siebel client. For information about the Siebel client installation process and configuration file, see *Siebel Web Client Administration Guide* and the Siebel server installation guide for the operating system you are using.

Interactive Assignment requires the following server components to be:

- Online
  - Assignment Manager
- Running
  - Server Request Broker

You are now ready to run Interactive Assignment. For an example, see "Running Interactive Assignment for a Service Request—An Example."

Running Interactive Assignment for a Service Request—An Example

The Activity and Service Request assignment objects are predefined to use Interactive Assignment. The following procedure is an example of running Interactive Assignment for service requests and is applicable for use with the Siebel Dedicated Web Client as well as the Siebel Web Client.

To run Interactive Assignment for a service request

1. From the application-level menu, choose View > Site Map > Service Requests > All Service Requests.
2. In the Service Requests list, select an open Service Request for assignment.
3. In the More Info form, click the Menu button and select Assign to start Interactive Assignment.
4. Choose an assignee from the list of best candidates provided by Assignment Manager.

The Siebel client:

- Communicates with the Siebel Assignment Manager on the Siebel Server and creates a list of qualified employees for the service request.
- Displays the list of qualified employees to the Siebel user, sorted by descending scores.
- Sets the service request owner to the employee that you choose.

Running Interactive Assignment Using the Command-Line SRVRMGR Utility

Interactive Assignment can be run from the command-line interface using the AsgnSrvr command and the parameters in Table 30. The command-line interface of the Server Manager is the srvrmgr program. For more information on using the command-line interface, see *Siebel Server Administration Guide*.

Table 30. Interactive Assignment Command-Line Interface Parameters

Parameter Name	Display Name	Description	Default Value
AllowDupPostn	Allow Duplicate Position	Allows assignment of duplicate positions to the team For more information, see "AllowDupPostn" on page 242.	FALSE
AsgnKey	Assignment Key	Rule set used for key-based routing For more information, see "AsgnKey" on page 242.	All AM Rule Set
AsgnMode	Assignment Mode	Mode of assignment	MatchAssign
AsgnObjName	Assignment Object Name	Name of the assignment object	
BatchSize	Batch Size	Number of objects to assign before committing for interactive assignment	100
EventDate	Event Date	Date of the event that caused this assignment request	
IgnoreCache	Ignore assignment rule cache	Ignore assignment rule cache and read from the database	FALSE
LogTxnChgOnly	Log txn only on change	Log transaction only when the assignment has changed	TRUE

Table 30. Interactive Assignment Command-Line Interface Parameters

Parameter Name	Display Name	Description	Default Value
MaxSkillsAge	Refresh people skills interval	Interval in which people skills are refreshed in seconds (must be greater than zero seconds). *Note:* This parameter is only applicable to interactive assignment.	0
ObjWhereClause	Object Where Clause	WHERE clause of the object for interactive assignment For more information, see "ObjWhereClause" on page 242.	
UseForUpdate	Use FOR UPDATE	Use FOR UPDATE to lock primary table row	TRUE

Running Assignment Manager in Dynamic Mode

Use Dynamic Assignment to reassign people when changes are made to the assignment objects (such as Account and Service Request). As other users and server programs make changes to the assignment object records, Dynamic Assignment automatically assigns the objects to the appropriate people and organizations.

This section explains how to run Assignment Manager in dynamic mode. The processes described are:

To run Dynamic Assignment, the following server components need to be:

- Enabled:
  - Generate Triggers
- Running:
  - Workflow Monitor Agent
- Set and activated:
  - Assignment Policies

NOTE: For performance reasons, do not run Dynamic Assignment when running Batch Assignment. Also, do not try to run Dynamic Assignment for a specified rule group. When the Workflow Monitor process starts for Dynamic Assignment, only assignment rules in the Default Group are loaded into memory.

You must run Generate Triggers to create triggers that monitor changes in the database.

NOTE: To regenerate triggers, you need to run Generate Triggers to remove existing triggers, and a second time to recreate new triggers.

The triggers created by the Generate Triggers server component detect changes in the Siebel database and trigger the Workflow Monitor Agent to alert the Assignment Server. However, triggers generated for Assignment Manager can reference other database columns not associated with assignment rules. It is important to make sure that triggers are generated only for an assignment policy's criteria. Large data loads can experience performance issues otherwise.

To check and edit triggers

1. Use Siebel Tools, or view the trigger.sql file (/Siebel Root/Siebsrvr/trigger.sql), to examine the appropriate table columns.

   For more information, see *Siebel Tools Reference*.

2. Disable the inappropriate columns by inactivating the assignment attribute column.

   For detailed information, see "Disabling an Assignment Attribute" on page 139.

3. Drop and regenerate new triggers (see the following section, "Generating Triggers").

4. Recheck the trigger.sql file, to confirm that the trigger is no longer active.

NOTE: When Dynamic Assignment is running, some users may receive the following error when attempting to modify a record: `"The selected record has been modified by another user since it was received. Please continue."` This may occur because Assignment Manager updated the record by assigning it while the user was trying to edit it. In this situation, the user's changes may be lost. The solution is to refresh the query and reenter the user's changes.

Generating Triggers

To run Dynamic Assignment, you need to run the Generate Triggers server component after:

- Creating or changing an Assignment Object, Assignment Attribute, or Assignment Criteria object type in Siebel Tools
- Changing assignment policies
- Installing or upgrading the Siebel Server

NOTE: When amending an assignment rule, criteria, or value, or when making changes to assignment positions in dynamic mode, you do not have to drop and then regenerate database triggers.

Use the Generate Triggers server component to generate the database triggers used by Workflow Manager to detect changes in the database. For more information about starting and using Generate Triggers, see *Siebel Business Process Designer Administration Guide*.

NOTE: You cannot create custom triggers on the Siebel database. The only supported triggers allowed on the Siebel database are those generated during installation or from running the Generate Triggers server component.

To run Generate Triggers

1. From the application-level menu, choose View > Site Map > Server Components Requests > My Component Requests.
2. In the Component Requests list, click New.

   A new record appears with a system-defined ID automatically generated with a status of Creating.

3 In the My Components Requests form, enter the relevant information for the new component request record.

   a In the Components/Job field, click the select button.

   b In the Components/Job dialog box, query for Generate Triggers, and then click OK.

   c In the Server field, type the name of the Siebel Server for which you want to run Generate Triggers.

   d In the Request Key field, type in the name of the request key.

   e Complete the rest of the fields, if needed.

4 In the Component Request Parameters list, click New to create a new record for the Table Owner Password, and enter the relevant parameter information.

   a In the Name field, click the select button.

   b In the Job Parameters dialog box, query for TableOwnPass, and then click OK.

   c In the Value field, type in the password for your tableowner.

NOTE: If you are using a Microsoft SQL Server database, you need to set the Table Owner Password value to the user password with tableowner privileges. Also make sure that the Table Owner value is set to `dbo`.

---

5 For the Microsoft SQL Server database, run the generated trigger.sql file against the database independently.

   a Select EXEC.

   b Click in the Value field.

   c Type FALSE.

NOTE: If the EXEC parameter is set to TRUE, the Generate Trigger component automatically creates the SQL script and applies it to the server database.

Also, if you are creating a large number of triggers because there are too many workflow policies, the triggers should be applied by the user and not by the Generate Triggers server process. The EXEC parameter should be set to FALSE in this case.

For more information on the EXEC parameter, see *Siebel Business Process Designer Administration Guide*.

6 In the My Component Requests form, click the Menu button, and then click Submit request.

Running Dynamic Assignment Using the Command-Line SRVRMGR Utility

Dynamic Assignment can be run using the GenTrig command-line interface command and the parameters in Table 31. The command-line interface of the Server Manager is the srvrmgr program. For more information on using the command-line interface, see *Siebel Server Administration Guide*.

Table 31. GenTrig Command-Line Interface Parameters

Parameter Name	Display Name	Description	Default Value
EXEC	EXEC	Install Triggers to DB directly	FALSE
Mode	Mode	Assignment Server and/or Workflow mode (ASGN, WORK, or ALL)	ALL
Remove	Remove	Remove All Triggers Mode	FALSE
TAMode	TAMode	All Territory or Contact Only mode	ALL
TrigFile	Trigger File Name	Output trigger script file name	trigger.sql

Running Workflow Monitor Agents

To run Dynamic Assignment, the Workflow Monitor Agent needs to be running. This server component monitors the S_ESCL_REQ table. Database triggers, when fired because of object changes, create records in the S_ESCL_REQ table. The Workflow Monitor Agent reads these new records and processes requests for Assignment Manager policies. Affected objects are then dynamically assigned. For more information about Workflow Monitor Agent, see *Siebel Business Process Designer Administration Guide*.

NOTE: Dynamic Assignment does not log information into S_ESCL_LOG. For more information about log files, see *Siebel Server Administration Guide*.

To start Workflow Monitor Agent from the command-line interface

1. Determine the workflow group that you want Workflow Monitor Agent to monitor.
   a. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Policies.
   b. In the Group field in the Assignment Policy list, choose the workflow group (the default group is Assignment Group).
2. Start the srvmgr program.

   For detailed information on this process, see *Siebel Server Administration Guide*. After the program starts, the prompt changes to:

   ```
   srvmgr: server_name>
   ```

3. At the prompt, enter the following information to start the Workflow Monitor Agent server component task; use the Group information gathered from Step 1 (Assignment Group used in this example):

   ```
   start task for component workmon with GroupName="Assignment
   Group"
   ```

4 Configure other component parameters, if needed.

For more information about other configurable parameters, see Table 32 on page 228.

NOTE: Separate the parameters and their values in the command-line statement with commas.

5 Alternatively, you can configure a Workflow Monitor Agent to start automatically to process assignment requests whenever the Siebel Server starts.

For detailed information, see *Siebel Business Process Designer Administration Guide*.

This command starts a new task running in the background and returns to the Server Manager immediately. For detailed information on starting, stopping, and monitoring server tasks, see *Siebel Server Administration Guide*. For further information about the Workflow Monitor Agent, see *Siebel Business Process Designer Administration Guide*.

NOTE: It is possible to set up multiple Workflow Monitor Agents for Dynamic Assignment. For more information, see the "Monitoring and Tuning Performance " section of *Siebel Business Process Designer Administration Guide*.

Table 32 shows the Workflow Monitor Agent command-line interface parameters.

Table 32. WorkMon Command-Line Interface Parameters

Parameter Name	Display Name	Description	Default Value
ActionAgent	Use Action Agent	Use Action Agent	FALSE
ActionInterval	Action Interval	Do not re-execute actions within specified interval in minutes	3600
BatchMode	Processes the batch policies	Process the batch Policies	FALSE
CheckLogCacheSz	Cache size of Policy violations	Number of policy violations to store in cache	100
DeleteSize	Request delete size	Request delete size	500
GenReqRetry	Number of seconds to retry	Number of seconds to retry sending a Generic Request message	120
GroupName	Group Name	Group Name	
IgnoreError	Ignore errors	Ignore errors while processing requests	FALSE
KeepLogDays	Number of days to keep violation information	Number of days worth of violation information that should be retained	30
LastUsrCacheSz	Cache size of last user information	Number of last user information items to cache	100
MailServer	Mail Server	Name of email server to send notification of abnormal termination	
MailTo	Mailing Address	Mail address to review notification of abnormal termination	
ReloadPolicy	Reload Policy	Reload Policy Interval in seconds	86400
Requests	Requests per iteration	Requests per iteration	5000

Activating Assignment Policies

Siebel applications include predefined assignment policies for each of the predefined assignment objects. You should use these predefined assignment policies. However, you can create new assignment policies for Dynamic Assignments.

Each Workflow Monitor Agent can monitor one or more assignment policies. You can use a single Workflow Monitor Agent to monitor all assignment policies by placing all assignment policies in the same workflow group (the predefined assignment policies are defined this way). You can also place the assignment policies in separate workflow groups and dedicate Workflow Monitor Agents for each workflow group.

Assignment Policies should be associated only with the Assignment Request (In Process) assignment action.

CAUTION: Assign a workflow policy group to only one Workflow Monitor Agent. Multiple Workflow Monitor Agents running the same workflow policy group cause unpredictable completion times and possible multiple actions created for one trigger. For more information, see *Siebel Business Process Designer Administration Guide*.

Also, you should not associate customized workflow actions with assignment policies. For more information about workflow actions, see *Siebel Business Process Designer Administration Guide*.

To enable Dynamic Assignment for an assignment object, activate the assignment policy for that object. To disable Dynamic Assignment for an assignment object, deactivate the assignment policy for that object.

The rest of this section explains how to activate, deactivate, set the workflow group for, and create actions for assignment policies. The procedures are:

- "To set the workflow group for assignment policies" on page 230
- "To activate an assignment policy" on page 230
- "To deactivate an assignment policy" on page 231
- "To create an action for an assignment policy" on page 231

To set the workflow group for assignment policies

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Policies.
2. In the Assignment Policies list, select the assignment policy for which you want to set the workflow group.
3. In the Group field, click the select button.
4. In the Workflow Groups dialog box, select a workflow group (the default is Assignment Group), and then click OK.

Figure 42 shows an example of successfully setting Assignment Group to the Account object assignment policy.

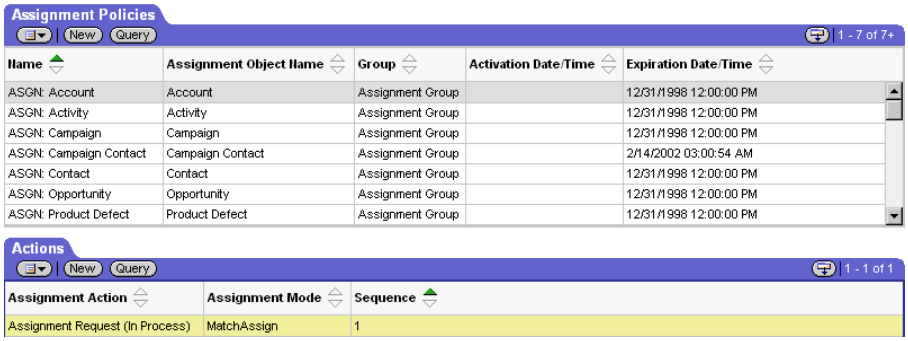


Figure 42. Example of Setting a Workflow Group for an Assignment Policy

To activate an assignment policy

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Policies.
2. In the Assignment Policies list, select the assignment policy you want to activate.
3. In the Expiration Date/Time field, click to either null the existing value or set the value to a later date.

Workflow components process only active assignment policies that have not expired. Figure 43 on page 232 shows an example of activating the Account object assignment policy.

To deactivate an assignment policy

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Policies.
2. In the Assignment Policies list, select the assignment policy you want to deactivate.
3. In the Expiration Date/Time field, set the value to a date that has already passed.

Workflow components process only active assignment policies that have not expired; therefore, you can deactivate an assignment policy by expiring it.

To create an action for an assignment policy

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Policies.
2. In the Assignment Policies list, select the assignment policy for which you want to create an action.
3. In the Actions list, click New.
4. In the new record, enter values for the relevant information.
   a. In the Assignment Action field, click the drop-down arrow and select Assignment Request (In Process).
   b. In the Assignment Mode field, click the down-arrow button and select MatchAssign.

NOTE: By default, every assignment policy has an action. You need to follow the preceding steps only if you accidentally remove an action or create a new assignment policy.

Figure 43 shows an example of successfully creating an action for the Account object assignment policy.

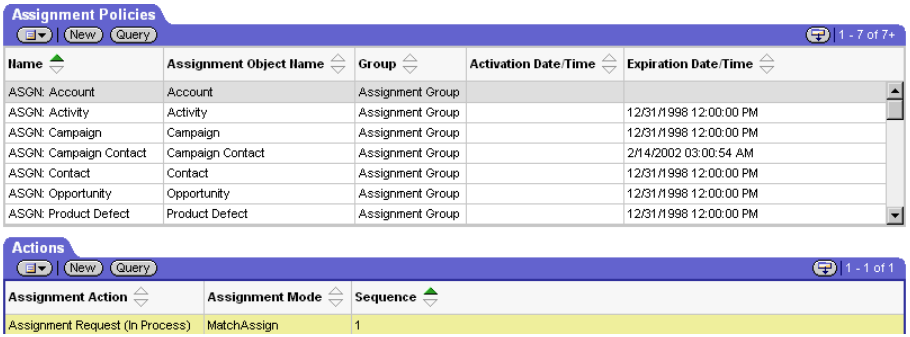


Figure 43. Example of Creating an Action for an Assignment Policy

Activating Contact Denormalization

Perform the following procedure to activate contact denormalization. The policy is inactivated by default.

NOTE: When Assignment Manager runs in Contact Denormalization mode, it does not evaluate assignment rules. Therefore, you do not need to select the Contact Denormalization object for the assignment rule to run Assignment Manager in Contact Denormalization mode.

To activate contact denormalization

1. From the application-level menu, choose View > Site Map > Assignment Administration > Assignment Policies.
2. In the Assignment Policies list, select Contact Denormalization, and then perform the following:
   a. In the Group field, click the select button.
   b. In the Workflow Groups dialog box, select a workflow group (the default is Assignment Group), and then click OK.

c In the Expiration Date/Time field, either clear the existing value or set the value to a later date.

3 In the Actions list, click New to create a new record and enter the relevant information.

a In the Assignment Action field, click the drop-down arrow and select Assignment Request (In Process).

b In the Assignment Mode field, click the down-arrow button and select Denorm.

Figure 44 shows an example of successfully enabling Contact Denormalization for Dynamic Assignment.

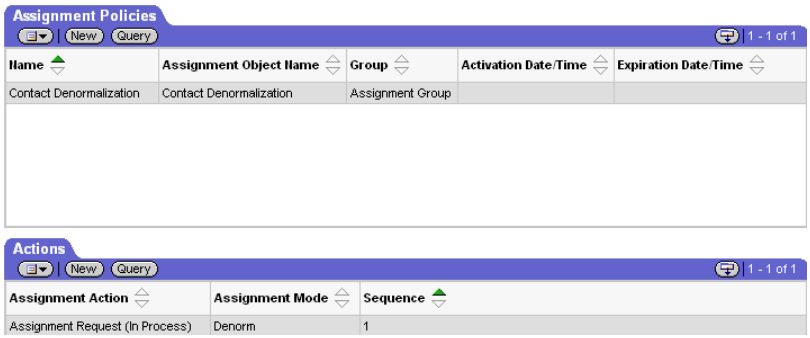


Figure 44. Enabling Contact Denormalization for Dynamic Assignment

NOTE: Dynamic assignment can refresh employee, position, and organization skills from the database if changes were made to these items. The program argument, MaxSkillsAge, forces Assignment Manager to reload this information if activated. By default, this argument is not set. In Siebel Tools, select the Assignment Request (In Process) workflow policy program to change the MaxSkillsAge argument. For information about how to set this parameter using command-line interface, see "Running Interactive Assignment Using the Command-Line SRVRMGR Utility" on page 218. For more information about setting the parameter, see *Siebel Tools Reference* and *Siebel Business Process Designer Administration Guide*.

Assignment Manager Performance in Dynamic Mode

If users experience slow response time while running Assignment Manager in dynamic mode, you can implement one or more of the following to improve Dynamic Assignment performance:

- Increase the Requests (Requests per iteration) workflow monitor parameter (the default is set to 5,000).
- Decrease the DeleteSize workflow monitor parameter (the default is set to 500).
- Decrease the SleepTime workflow monitor parameter (the default is 60 seconds).
- Increase the ReloadPolicy workflow monitor parameter to a much larger number, for example, 86,400 seconds (the default is 600 seconds).
- Distribute each assignment policy into its individual group and then invoke several Workflow Monitor Agents concurrently (one on each Siebel Server, if available).

Running Assignment Manager in Mobile Mode

This section includes procedures to run Assignment Manager in mobile mode. Use Mobile Assignment to reassign people based on changes uploaded by mobile clients. Assignment Manager assigns objects after a mobile client synchronizes with the Siebel Server and uploads assignment requests or any changes to objects and assignment rules. Depending on the configuration of Generate Triggers, the Workflow Monitor detects these changes and activates Assignment Manager to dynamically reassign affected objects. For more information, see "Mobile Assignment" on page 62.

NOTE: If a disconnected client sends an assignment request to the Siebel Server while running Mobile Assignment, the request is sent as an asynchronous request. Because of this, the request does not override the Keep Manual Assign flag.

To run Mobile Assignment

1. Be sure that you have run the Generate Triggers server component.

   For instructions, see "Generating Triggers" on page 222.

2. Start the Workflow Monitor Agent.

   For instructions, see "Running Workflow Monitor Agents" on page 226.

3. Start the Server Request Broker server component (if running Interactive Assignment).

   For instructions, see *Siebel Server Administration Guide*.

Running Assignment Manager in Batch Mode

This section explains how to run Assignment Manager in batch mode. Use Batch Assignment to assign an assignment object in a single batch. You *must* run Assignment Manager in batch mode if you change non-object data that can affect assignments. This happens whenever you:

- Modify assignment rules and want these changes to affect existing objects. You modify assignment rules when you:
  - Add or remove employees, positions, or organizations
  - Add, remove, or update assignment criteria or criteria values
  - Associate a rule with a different rule group or change the rule sequence number
  - Change scores
  - Change activation and expiration dates
  - Change exclusive mode
- Modify the list of employees, positions, or organizations and you want these changes to affect existing objects. You modify the list of employees, positions, or organizations when you:
  - Add new employees, positions, or organizations (if you use assignment rules with the All People setting)
  - Change skills of employees, positions, or organizations (these values are cached in memory)
- Change the Assignment Manager configuration in Siebel Tools and you want your changes to affect existing objects. You change the Assignment Manager configuration when you:
  - Change Assignment Attribute definitions
  - Change Assignment Criteria definitions
  - Change Assignment Object definitions
  - Change Workflow Policy Object definitions

- Use EIM (Enterprise Integration Manager) to perform initial loads (if you do not run Generate Triggers to create the appropriate triggers).

  NOTE: When using EIM to load assignment rules, make sure the column ASGN_TYPE_CD includes a value. If it is left NULL, which is permissible in EIM, the rules are loaded but Assignment Manager fails.

- Feel that existing assignments may not be accurate. Assignment Manager does not change assignments if the existing assignments are correct.

  NOTE: When batch mode is run on correct assignments, although there are no changes to the team or primary, an update of the record occurs. This situation can disturb other workflow policies relying on various record fields. For example, a workflow policy relying on PR_POSTN_ID field to trigger an action does not work properly if this field is updated from a new batch assignment. If your deployment uses SQL Server, this note does not apply.

If you run both Batch Assignment and Dynamic Assignment in your environment, the Batch Assignment can activate Dynamic Assignment due to triggers created in the database required to run Dynamic Assignment. Before running Batch Assignment, you should deactivate all assignment policies and drop related triggers to prevent Dynamic Assignment from processing modified rules, objects, and candidates. For more information, see "To deactivate an assignment policy" on page 231 and "To run Generate Triggers" on page 222. After completing Batch Assignment, you can activate the assignment policies and re-enable Dynamic Assignment. For more information on batch assignment, see "Batch Assignment" on page 62. For more information, see "To activate an assignment policy" on page 230.

NOTE: For performance reasons, do not run Batch Assignment while running Dynamic Assignment.

You can have a batch assignment task load only a particular group of rules into memory by specifying the ROW ID of the rule group in the Assignment Key parameter when you start the task. If no rule group is specified for this parameter, the batch task loads all rules in the Default Group into memory. If no rule groups have been defined in the application, then all active rules in the database load. For more information, see "Assignment Rule Groups" on page 25.

To run Batch Assignment

1. From the application-level menu, choose View > Site Map > Server Component Requests > My Component Requests.
2. In the My Component Requests form, click New.

   A new record appears with a system-defined ID automatically populated with a status of Creating.
3. In the new record, enter the relevant information for the new component request.
   a. In the Components/Job field, click the select button.
   b. In the Components/Jobs dialog box, query for Batch Assignment, and then click GO.
   c. In the Server field, type the name of the server on which you want to run this batch request.
   d. Optionally, if you want to run a specific rule group for this batch, type the Row ID of the assignment rule group for which you want rules processed for the AsgnKey parameter.
   e. Complete the rest of the fields for the new record, if needed.
4. In the Component Request Parameters list, click New to create a new record, and enter relevant information for the assignment object that you want to assign as part of this batch request.
   a. In Name field, click the select button.
   b. In the Job Parameters dialog box, select Assignment Object Name, and then click OK.

c In the Value field, enter the name of the assignment object for the parameter.

Use the exact name found in Siebel Tools, such as `Service Request` or `Order (Sales Credit Assignment)`.

NOTE: Because Batch Assignment cannot run more than one assignment object per batch, you should run Batch Assignment on only one assignment object for each batch.

---

5 While still in the Component Request Parameters list, click New to create a new record so that Assignment Manager uses the Object WHERE clause to limit the number of rows processed at one time.

a In Name field, click the select button.

b In the Job Parameters dialog box, query for ObjWhereClause, click Go, and then click OK.

c In the Value field, enter a WHERE clause to select the object instance that you want to process; the WHERE clause can include up to 100 characters.

For example, to select object instances beginning with ibm, type:

```
WHERE name like 'ibm%'
```

NOTE: If you leave the value field blank, all object instances are selected. However, it is strongly recommended that you limit the number of rows that Assignment Manager processes to make sure that sufficient rollback space is available.

For more information about using the Object WHERE clause, see Table 33 on page 241 and further description following table.

6 Optionally, if you want to enable Contact Denormalization for Batch Assignment, add two more component request parameter records with values from the following table:

Parameter Name	Value
Assignment Object Name	`Contact Denormalization`
Assignment Mode	`Denorm`

7 Optionally, if you want to save changes to the database during batch processing, add another component request parameter as follows:

   a In Name field, click the select button.

   b In the Job Parameters dialog box, query for Batch Size, and then click Go.

   c In the Value field, enter the number of objects to assign before committing each batch.

8 In the My Component Requests form, click the menu button and choose Submit request.

CAUTION: Batch Assignment updates the ASGN_DT and timestamp fields if there is a net change (for example, if there is a change in at least one of the primaries or if there is a change in at least one of the team tables), and all columns are updated (primaries, ASGN_DT, and system columns). However, if there is no net change, only the ASGN_DT column is updated.

Running Batch Assignment Using the Command-Line SRVRMGR Utility

Batch Assignment can be run from the command-line interface using the AsgnBatch command and the parameters in Table 33. The command-line interface of the Server Manager is the srvrmgr program. For more information on using the command-line interface, see *Siebel Server Administration Guide*.

Table 33. Batch Assignment Command-Line Interface Parameters

Parameter Name	Display Name	Description	Default Value
AllowDupPostn	Allow Duplicate Position	Allows duplicate positions. For more information, see "AllowDupPostn" on page 242.	FALSE
AsgnKey	Assignment Key	Used to specify a particular rule group for a batch assignment task. For more information, see "AsgnKey" on page 242.	All AM Rule Set
AsgnMode	Assignment Mode	Mode of assignment	MatchAssign
AsgnObjName	Assignment Object Name	Name of the assignment object	
BatchSize	Batch Size	Number of objects to assign before committing for Batch Assignment	100
EventDate	Event Date	Date of the event that caused this assignment request	
IgnoreCache	Ignore Assignment Rule Cache	Ignore assignment rule cache and read from the database	FALSE
LogTxnChgOnly	Log txn only on change	Log transaction only when the assignment has changed	TRUE
ObjWhereClause	Object Where Clause	WHERE clause of the object for Batch Assignment For more information, see "ObjWhereClause" on page 242.	
UseForUpdate	Use FOR UPDATE	Use FOR UPDATE to lock primary table row	TRUE

Additional Parameter Characteristics

The following bulleted points provide additional information about some of the parameters shown in Table 33 on page 241.

- **AllowDupPostn**

  When this parameter is set to TRUE (set to FALSE by default), Assignment Manager attempts to insert duplicate positions (positions with the same id) in the team table, given these positions do not violate the user key constraints of the table. The third field of the PositionTeamDenorm (Y, N value) user property specifies which destination columns are part of the user key. Assignment Manager checks whether or not positions with the same Id that pass violate the uniqueness of these key columns. If Assignment Manager detects a violation, the position with the lower score is ignored. Otherwise, Assignment Manager inserts both positions in the team table.

  If Assignment Manager detects a violation, only the first position encountered is inserted and the other is ignored.

- **AsgnKey**

  The AsgnKey parameter is the row id of the assignment rule group that is associated with the rules you want to evaluate. When using AsgnSrvr, the AsgnKey parameter must be the row id of one of the rule groups defined for the Server in the Server Key Mappings view. For AsgnBatch, it can be the row id of any of the available rule groups. The default value of the parameter is All AM Rule Set, in which case all active rules are evaluated.

- **ObjWhereClause**

  Standard SQL WHERE statements are used for the Object WHERE Clause and can include up to 2048 characters when a batch assignment server task is started using the command-line interface. However, when you start a batch assignment server task from the Component Requests screen, you can only specify up to 100 characters. Also, when using wildcards in the object WHERE clause, make sure you use the correct wildcard specific to your database.

  The Object WHERE Clause can be used to restrict which records are retrieved and processed in Batch Assignment. The following conditions apply:

- Joins are allowed in the Object WHERE Clause.

  An example of a join is as follows:

  ```
  Assignment Object = Account

  Object Where Clause = where pr_postn_id in (select row_id from
  s_postn where name = 'Sales Rep')
  ```

  The Object WHERE Clause assumes the base table is coming from the assignment object specified.

  For example, if you start Batch Assignment specifying the assignment object as Account and the Object Where Clause is `where row_id = '1-232'`, then Batch Assignment attempts to assign only the `row_id = '1-232'` from the S_ORG_EXT table.

  The following is an example of a batch assignment using the command-line interface:

  ```
  start task for component AsgnBatch with AsgnObjName= “Account”,
  AsgnMode=“MatchAssign”, ObjWhereClause=“where name like 'B%'”
  ```

  This command batch assigns accounts starting with *B*. Optionally, you can use the command-line interface and the Object WHERE Clause to run only a select number of assignment rule groups. The following is an example of this:

  ```
  start task for comp asgnbatch with asgnobjname="Account",
  objwhereclause="where name like 'B%'", asgnkey="12-4DR56"
  ```

  In this example, 12-4DR56 is the Row Id of an assignment rule group, and only those rules belonging to this group are evaluated when this parameter is passed in the request.

  NOTE: When using the command-line interface, use double quotation marks for the ObjWhereClause parameter; otherwise, it is treated as a SRVRMGR command option that changes the case.

Assignment Manager Performance in Batch Mode

If users experience slow response time while running Assignment Manager in batch mode, review the settings on virus software installed on the applicable server. Implement one or more of the following settings to improve batch assignment performance.

- Virus scan only program files.
- Exclude all outbound files from virus scanning.
- Exclude the RDBMS directory where all msb files are located from virus scanning.

Make sure to run a full virus scan on all files during the weekend or off-peak time if the preceding settings were used.

You can also implement one or more of the following to boost batch performance in batch mode:

- Increase the BatchSize parameter, for example, set the batch size to 500 (the default is set to 100).

  This increases the number of records that are processed within a transaction before a commit occurs, resulting in less resources used and faster assignment.

  NOTE: Only set large batch sizes when there are no or very few users on the system.

- Create multiple instances of Batch Assignment (using WHERE clause statements). See "Running Multiple Instances of Assignment Manager in Batch Mode" on page 246.
- Select a good filter.

  This reduces the time it takes to retrieve Object records.

  NOTE: Use indexed field or fields for comparison in the object WHERE clause, such as Name for Account and Opportunity, or Last Name for Contacts.

- Use better logic.

  For example, if you want to run Account Assignment based on account name, you can create multiple batches so that the first batch starts with names beginning with the letter C through K, the second batch starts with the letter L through R, and so on.

  Consider the following logic:

  Object Where Clause: `WHERE NAME > 'B' AND NAME < 'L'`

  Although this causes the database to retrieve account records with names starting with the letter C through K, the WHERE clause is specified in such a manner that if accounts starting with the letter M through Z are encountered, they are passed on the first round because the values are > B. They are then eliminated in the second round (< 'L') by the database. These records are not needed in the batch because there is a cap of account names less than L.

  It is better logic to use:

  Object Where Clause: `WHERE NAME < 'L' AND NAME >'B'`

  By switching the order of the conditions, the extra parsing required by the database in the second round is eliminated because most of the names start with a letter greater than B.

Running Multiple Instances of Assignment Manager in Batch Mode

When there are many objects that need to be assigned, you can run multiple instances of Assignment Manager in batch mode to improve performance. First, develop a strategy for specifying multiple batches using the Object Where Clause parameter in the Batch Assignment component. Then, start multiple instances of Batch Assignment specifying the appropriate Object Where Clause for each instance.

For example, you can run one instance of Batch Assignment for accounts that changed today and a different instance of Batch Assignment for accounts that changed yesterday. Use the Object Where Clause parameter to specify the following:

- For the batch that processes accounts changed today:

  ```
  Object Where Clause: WHERE LAST_UPD = SYSDATE
  ```

- For the batch that processes accounts changed yesterday:

  ```
  Object Where Clause: WHERE LAST_UPD = SYSDATE - 1
  ```

To process mutually exclusive sets of records when running multiple instances of Assignment Manager simultaneously for the same assignment object, you should specify an Object Where Clause for each assignment task. For more information about the Object Where Clause parameter, see "ObjWhereClause" on page 242.

There are several instances where you should *not* run multiple simultaneous batch jobs:

- If multiple Assignment batches are executed for the same object, then the results can potentially vary and may not be as desired
- If the batch jobs update rows on the same table or tables
- If one batch job updates records in a table or tables used by another batch job as input
- If the batch jobs use workload criteria to assign the same object

NOTE: If multiple assignment batches are executed for the same object using workload criteria, the results can potentially vary and may not be as desired.

Examples of when you should *not* run multiple simultaneous batch jobs include:

- Contact and Contact Denormalization because the same tables are updated
- Account and Contact Denormalization because Contact Denormalization uses Account team as input
- Opportunity and Contact Denormalization because Contact Denormalization uses Opportunity team as input

NOTE: The ASGN_PROC_ID column in the S_ORG_EXT table is no longer used. If you have updated this column to run multiple batches of Batch Assignment in previous versions, note that as of version 6.0 you can no longer do so.

Advanced Configuration 6

Assignment Manager allows the creation of very advanced assignment configurations. This chapter is intended for users familiar with the preceding chapters and who require further information on refining their Assignment Manager deployment.

Before beginning any of the following procedures, review background knowledge in the Siebel software architecture, Siebel Tools, and Siebel Workflow Manager. Consult the following documentation for this information: *Siebel Tools Reference* and *Siebel Business Process Designer Administration Guide*.

For further information or assistance on any of these procedures, contact Siebel Technical Support.

Creating Assignment Rules to Assign Two Objects

In some cases, you may want to create an assignment rule that assigns candidates to two objects while using only one object's criteria. This section uses a specific scenario as an example in which you create an assignment rule to use only an Opportunity criteria to assign candidates to both the Opportunity and Account objects. This rule can be used to assign candidates to opportunities and their associated accounts.

To create assignment rules that assign two objects using only one object criteria, you need to create and map workflow policy components using Siebel Tools.

To define an assignment rule for two objects using one assignment criteria

1. Create an assignment rule and specify the assignment objects that are assigned using this rule.

   For this example, create an assignment rule called Account/Opportunity and add the Account and Opportunity objects to this rule. For more information about creating assignment rules, see "Creating Assignment Rules" on page 161.

2. Create an assignment criteria that applies to only one of the assignment objects in this assignment rule.

   For this example, configure the Lead Quality Code assignment criteria (an Opportunity object criteria). For more information on creating assignment criteria, see "Defining Server Key Maps" on page 168.

3. After the assignment rule is defined, create a workflow policy component that maps to both objects.

   For information on creating a workflow policy component, see "Phase 1: Creating a Workflow Policy Component for Both Objects" on page 146.

4 Map the workflow policy component you created with the column.

For information on mapping a workflow policy column, see "Phase 2: Mapping a Column to the Workflow Policy Component" on page 148.

5 Map the workflow policy component you created to the assignment attribute.

For information on mapping a workflow policy component to assignment attributes, see "Phase 3: Mapping the Workflow Policy Component to the Assignment Attribute" on page 150.

Figure 45 shows an example of defining an assignment rule for the Account and Opportunity objects using only the Lead Quality Code assignment criteria.

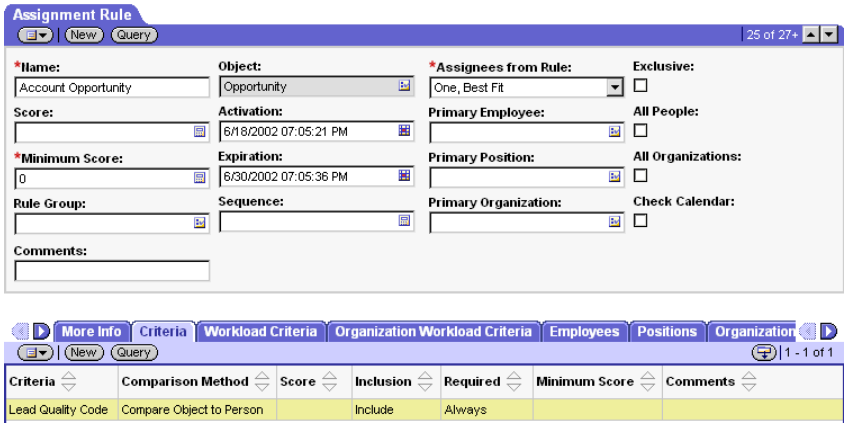


Figure 45. Example of Defining an Assignment Rule for Two Objects Using One Assignment Criteria

Assigning Objects Based on the Primary Address

An assignment rule with address criteria, by default, passes objects (Account, Contact, and Opportunities, for example) based on any one of the multiple addresses associated with the objects. However, Assignment Manager is configurable to assign based on only the primary address. This configuration is completed through Siebel Tools in the following procedure. The Account assignment object is used in this example.

NOTE: For Siebel Life Sciences, Assignment Manager can populate the Primary Address field for the system-assigned positions for the contacts on the intersection table (S_POSTN_CON).

To assign objects based on the primary address

1. Start Siebel Tools.
2. Select the assignment object.
   a. In the Object Explorer, expand Workflow Policy Object.
   b. In the Workflow Policy Objects list, select Account.
3. Select the workflow policy component to change the Source Column and Target Column fields.
   a. In the Object Explorer, select Workflow Policy Component.
   b. In the Workflow Policy Component window, select Account Address.
   c. Change Source Column Name to ROW_ID (from OU_ID).
   d. Change Target Column Name to PR_ADDR_ID (from ROW_ID).
4. Repeat Step 2 and Step 3 for the Contact and Opportunity assignment objects.
5. Check in the projects to the server.

   For more information about checking in projects, see *Siebel Tools Reference*.

6 Drop and regenerate triggers by running the Generate Triggers server component (if using dynamic assignment or workflow policies).

See "Generating Triggers" on page 222 for more information on stopping and restarting this server component. Alternatively, see *Siebel Server Administration Guide*.

Assigning Child Accounts Based on Parent's Primary Address

A common business requirement involves the configuration of Assignment Manager to assign children accounts based on the primary account's address. This configuration is completed through Siebel Tools using the following procedure.

To assign child Account objects based on the parent's primary address

1. In the Object Explorer, select the Workflow Policy object and click the Account record; expand the Workflow Policy object in the Object Explorer and select the Workflow Policy Components object.
2. Create two new workflow policy components, Parent Account and Parent Account Address, with the properties in the following table:

Name:	Parent Account	Parent Account Address
Source Table Name:	S_ORG_EXT	S_ADDR_ORG
Source Column Name:	ROW_ID	ROW_ID
Target Component Name:	Account	Parent Account
Target Column Name:	PAR_OU_ID	PR_ADDR_ID

3. While the new Parent Account Address record is selected, expand the Workflow Policy Component object and click the Workflow Policy Component Column object. Create a new record with the properties in the following table:

Name:	State
Alias	Parent Account State

4 In the Object Explorer, select the Assignment Attributes object and create a new record with the properties in the following table:

Name:	Parent Account State
Data Type:	Varchar
Pick List:	PickList State
Pick Field:	Value

5 While the new assignment attribute Parent Account State is selected, expand the Assignment Attributes object and click the Assignment Attributes Column object. Create a new record with the properties in the following table:

Name	Account: Parent Account State
Assignment Object	Account
Workflow Object:	Account
Workflow Component:	Parent Account Address
Workflow Component Column:	Parent Account State
Sequence:	1

6 In the Object Explorer, select the Assignment Criteria object and create a new record with the properties in the following table:

Name:	Parent Account State
Display Name	Parent Account State
Use Expertise	FALSE

7 While the new assignment criteria Parent Account State is selected, expand the Assignment Criteria object and click the Assignment Criteria Attribute object; create a new record with the following properties:

Name:	Account: Parent Account State
Assignment Attribute:	Parent Account State
Store Column:	1
Display Sequence:	1
Display Name:	Parent Account State

After the configurations are complete, the project must be checked into the server, and various server administration procedures must be run. To update your deployment with these new configurations, see "Server Administration After Configuration" on page 153.

For more information on compiling projects, see *Siebel Tools Reference*. For information on distributing the siebel.srf file, see *Siebel Anywhere Administration Guide*.

An assignment rule can now be created that assigns child accounts based on the parent's primary address.

NOTE: Make sure the child account has a value in the PAR_OU_ID column pointing to a parent account that has the primary address.

Reassigning Accounts to a Different Primary Position

To reassign Account assignment objects to another position, use the following procedure. This procedure provides an example of mapping the PR_POSTN_ID column of the Account's base table (S_ORG_EXT) to a new assignment attribute named Account Primary Position. Configuration in Siebel Tools is required for this process.

NOTE: The following procedure can be employed anytime you want to use a base table column as an assignment attribute.

To reassign accounts to a different position

1. Start Siebel Tools (see *Siebel Tools Reference* for more information on proper Siebel Tools configuration procedures).
2. In the Object Explorer, select the Workflow Column object and create a new record with the following properties:
   - Name: Account Primary Position Id
   - Table: S_ORG_EXT
   - Column: PR_POSTN_ID
3. Select Workflow Policy Object > Account > Workflow Policy Component > Account record; drill down to the Workflow Policy Component Column and add a new record called Account Primary Position Id.
4. In the Object Explorer, select Assignment Attribute and create a new record called Account Primary Position; drill down to Assignment Attribute Column and add a new record with the following properties:
   - Name: Account: Account Primary Position Id
   - Assignment Object: Account
   - Workflow Policy Object: Account
   - Workflow Component: Account
   - Workflow Policy Component Column: Account Primary Position Id

- Sequence: 1

5. In the Object Explorer, select Assignment Criteria and create a new record called Account Primary Position; drill down to the Assignment Criteria Attribute and create a new record called Account Primary Position Id with the following properties:
   - Name: Account Primary Position Id
   - Assignment Attribute: Account Primary Position Id
   - Store Column: 1
   - Display Sequence: 1
   - Display Name: Id
6. Check in the project to the server, compile changes to the siebel.srf file, and distribute it to your users.
   a. Choose Tools > Compile.
   b. In the Object Compiler dialog box, select the Assignment project.
   c. Select the Siebel client repository file (default is siebel.srf file) located in the Objects subdirectory within the Siebel client root directory.
   d. Click Compile.
7. In the updated Client, create a new assignment rule based on the assignment object Account; add a new criterion for this rule, and select the Account Primary Position; under the values applet, select the ROW_ID of the position you want to reassign.
8. Navigate to the Positions view of this new Assignment Rule; select the new position that is to replace the previous position.
9. Release assignment rules by clicking Release in the Assignment Rules view.
10. Run a Batch Assignment against a test account that includes the old position; use the following parameters:
    - Object: Account
    - Object WHERE clause: `WHERE ROW_ID='<your_value>'`

11 Confirm that the test account is reassigned and then run a Batch Assignment to reassign the other accounts to the new position; use the following parameters:

- Object: Account
- Object WHERE clause: `WHERE PR_POSTN_ID='<your_value>'`

Thoroughly test this assignment rule before applying it to your production environment. After your Accounts have been reassigned, it is recommended that you expire this rule.

12 Depending on your situation, run Contact Denormalization to update the contact access list.

13 To set up Position in the Values applet as a picklist, select the appropriate picklist and applet when configuring the Workflow Column and Assignment Criteria Attribute for the Account Position Id.

Routing of Assignments to Mobile Users

The component parameter LogTxnChgOnly controls whether transactions with no change to Assignment primary or team members are routed to mobile or remote users. This parameter has a default setting of TRUE for Batch Assignment, Interactive Assignment (Assignment Manager), and implicitly Dynamic Assignment (Workflow Monitor Agent). As a result, transactions with no change to Assignment primary or teams are not routed to mobile users. To change the LogTxnChgOnly parameter for dynamic assignment, use the following steps. This procedure requires configuration in Siebel Tools.

To change the LogTxnChgOnly parameter

1. Stop the Workflow Monitor Agent processing the assignment policies.
2. Start Siebel Tools (see *Siebel Tools Reference* for more information on proper Siebel Tools configuration procedures).
3. In the Object Explorer, select the Workflow Policy Program and select Assignment Request (In Process).
4. Drill down to Workflow Policy Program Arguments in the Object Explorer and select the LogTxnChgOnly parameter.
5. Change the value to TRUE or FALSE.
6. Check in the project to the server.
7. Restart the Workflow Monitor Agent.

NOTE: You do not need to recompile the .srf file.

Maintaining the Manually Assigned Primary Position

Assignment Manager maintains an assignment object's manually assigned primary position only when PR_REP_MANL_FLG = Y. By default, this value is set to N.

For example, when an assignment opportunity object is created in the Siebel UI, the creator is added to the opportunity object's team as the primary. For this position to be recognized as the manually assigned primary by Assignment Manager, an employee with Data Administration rights must set this property in the appropriate administrative screen. This action changes PR_REP_MANL_FLG to Y so Assignment Manager does not reset the primary when run.

To maintain the object's primary position

1. Start your Siebel application.
2. Access the Data Administration screen (check your responsibility if this screen is not visible).
3. Navigate to the Opportunity (or other assignment object) screen.
4. Locate and select the assignment object of interest.
5. Click the Sales Team select button to launch the Sales Team window.
6. Click the Primary check box of another position in the list; then reselect the Primary check box of the original position.

   This process changes the system PR_REP_MANL_FLG value to Y and updates PR_REP_SYS_FLG to N.

This procedure can also be used to add positions to the object or delete system-assigned positions from the object.

Stopping Assignment of the Default Organization

If you want to override the assignment of all organizations to an assignment object, you must remove the assignment property Org Primary Column from a selected assignment object. The default value is set to BU_ID. After this value is set to null, Assignment Manager does not assign any organization to the assignment object. The following procedure details this configuration. The account assignment object is used as an example.

To stop assignment of the default organization to Account object

1. Start Siebel Tools and select the appropriate project.
2. In the Object Explorer, expand Workflow Policy Object.
3. Select Assignment Object.
4. Select the Account Record.
5. In the Properties Window, find the property called Org Primary Column.
6. Delete the value for this property. (The default value is BU_ID.)

After the assignment object is modified, various server administration procedures must be run to make sure your configurations are recognized by Assignment Manager.

- If you are using Batch Assignment, start a new task.
- If you are using Dynamic Assignment, stop and restart the Workflow Monitor Agent.
- If you are using Interactive Assignment, stop and restart the Assignment Manager Server Component.

NOTE: It is not necessary to recompile the .srf file when configuring an assignment object to stop assignment of the default organization.

Stopping Assignment of Organizations for Accounts

If you do not want Assignment Manager to reassign the organizations that you have setup for an account, you must change the default values for the Account assignment object properties in Siebel Tools.

To stop reassignment of organizations for accounts

1. Start Siebel Tools.
2. In the Object Explorer, expand Workflow Policy Object.
3. In the Workflow Policy Object list, select Account.
4. In the Object Explorer, click Assignment Object.
5. In the Assignment Objects list, set the following values:
   - Default Organization = < blank >
   - Org Primary Column = < blank >
   - Org Table = < blank >
   - Set Primary Org = FALSE

   NOTE: Where < blank > is a null value.

   After these values are set, Assignment Manager does not reassign any organizations for accounts.
6. Run various server administration tasks.

   For instructions, see Step 2 and Step 3 of the "To update your deployment with new configurations" procedure.

   NOTE: It is not necessary to recompile the .srf file. However, you should check-in the changes to the server database.

Setting the Lock Assignment Default Value for Activity Assignment Objects

Assignment objects contain a lock assignment feature that, when activated by checking the Lock Assignment column on the object's list applet in Siebel Tools, prevents Assignment Manager from assigning or reassigning a position or candidate to that object.

The Lock Assignment parameter for activity objects is, by default, set to TRUE. This setting does not allow Assignment Manager to assign these objects. Therefore, Assignment Manager does not assign activity records. However, the Field Service Activity object is the one exception and is, by default, available for assignment (the Lock Assignment parameter is set to FALSE). Other activity objects must have the Lock Assignment parameter set to FALSE or null for assignment to occur. In the Siebel application, the lock assignment feature for activity records (except for Field Service activity records) defaults to "Y".

Using Siebel Tools, you can implement assignment of all types of activities by setting the default value of the Assignment Excluded field to FALSE at the business component level.

The following procedure explains how to set the Lock Assignment default value so that Assignment Manager assigns activity objects. A similar procedure can be used for other assignment objects.

To set the lock assignment default value to assign activity objects

1. Start Siebel Tools.
2. In the Object Explorer, expand the Business Component object.
3. In the Business Components list, select Action.
4. In the Object Explorer, click Field.
5. In the Fields list, select Assignment Excluded, and change the Post Default Value field to "N".
6. Check-in the changes to the server.

   For more information about checking in changes, see *Siebel Tools Reference*.

7 Recompile the .srf file.

For more information about recompiling the .srf file, see "To update your deployment with new configurations" on page 154.

8 Make sure that all Siebel clients that create activity records have the new .srf file.

NOTE: This step applies only to mobile or dedicated clients.

Assignment Manager now assigns activity records based on the defined assignment rules.

For more information about the Activity assignment object, see "Activity Object Parameters" on page 295.

Configuring Assignment Objects to Copy Additional Columns to the Team Table

When an item, such as an account or opportunity, is assigned to a team of people, the team field (the actual name of the field varies depending on the view) for that record shows a list of the people assigned to that item. This list of names is known as the team table for the given record. When making assignments, Assignment Manager passes information about the team members to the team table, such as the name of the person, that person's position and user ID, and so on. This section explains how to configure assignment objects to add additional information about team members to the team table.

Using Siebel Tools, you configure assignment objects to copy additional columns to the team table. The following procedure details this configuration. As an example, copying columns to the team table S_ORD_CRDT_ASGN of the Order (Sales Credit Assignment) assignment object is considered; data is copied from the S_ASGN_GRP_POSTN rule group position table.

To configure an assignment object to copy additional columns to the team table

1. Start Siebel Tools.
2. Select the assignment object for which you want to copy additional columns to the team table.
   a. In the Object Explorer, expand Workflow Policy Object.
   b. In the Workflow Policy Object window, select the object.

      For this example, select Order.
   c. In the Object Explorer, expand Assignment Object, and then select Assignment User Prop.

3 In the Assignment User Properties window, choose Edit > New Record to define user properties for the assignment object.

a In the Name field, type a name for the property starting with PositionTeamDenorm followed by a digit (for example, PositionTeamDenorm1, PositionTeamDenorm2).

b In the Value field, use the following syntax to enter values (for value descriptions, see Table 34 on page 268):

```
source column,destination column,flag,default value
```

For this example, the following table shows the valid user properties for the Order (Sales Credit Assignment) assignment object:

Name	Value
PositionTeamDenorm1	DATE1,START_DT,N
PositionTeamDenorm2	CHAR2,SLS_TERR_ID,Y
PositionTeamDenorm3	CHAR1,CRDT_RULE_ID,N
PositionTeamDenorm4	NUM1,ALLOC_PCT,N
PositionTeamDenorm5	CHAR3,FROM_BTM_NODE_FLG,N
PositionTeamDenorm6	NUM2,ROLLUP_PCT,N

Table 34 provides descriptions for each field of the assignment user property values.

Table 34. Assignment User Property Values

Value	Description
source column	The name of the column in the assignment rule group position table whose value is copied to the destination column of the team table. The source column can be one of the following columns: CHAR1, CHAR2, CHAR3, CHAR4, NUM1, NUM2, NUM3, NUM4, DATE1, DATE2. For this example, the values are copied from the S_ASGN_GRP_POSTN table.
destination column	The name of the column in the team table where the values are copied. The destination column must be one of the user data columns in the team table of the assignment object. For this example, SLS_TERR_ID is one of the columns of the S_ORD_CRDT_ASGN table, which is the team table of the Order assignment object.
flag	Indicates whether or not (Y = TRUE) the respective destination column is part of the user key of the team table. Without this flag specified, duplicate positions cannot be inserted in the team table. For more information about duplicate positions, see "AllowDupPostn" on page 242.
default value	Specifies the values that are inserted in the destination columns if the assignee is the default. For this example, the default values are null. Note: This value is optional if the default position is not specified.

When Assignment Manager runs, the user property values are copied to the team table. For more information about running Assignment Manager using the copy columns features, see Chapter 5, "Running Assignment Manager."

For more information about team tables, see "Assignment Scoring" on page 51, "Contact Denormalization" on page 63, and "Configuring Assignment Objects for Team Scoring" on page 114.

Version Compatibility 7

This chapter provides a summary of the changes and compatibilities between Territory Assignment in Version 4.*x* and Assignment Manager in version 5 and higher. Major differences between Territory Assignment and Assignment Manager covered in this chapter include:

- System preferences
- Tables
- Command line options

NOTE: The Territory List and Detail views will eventually be phased out from the Assignment Administration screens. If your configuration currently uses these views, note that they can migrate to the existing Assignment Rule views with no loss of functionality or data. For further information, contact Siebel Technical Support.

System Preferences Compatibility

Territory Assignment System Preferences (Version 4.x) are no longer used in Version 5 and higher; these preferences are referred to now as assignment object properties. Assignment Manager preferences are now set in Siebel Tools by navigating to Workflow Policy Object in the Object Explorer. Each assignment object is defined as a Workflow Policy Object. To define the preferences for an assignment object, expand the corresponding Workflow Policy Object, select Assignment Object, and locate the preference. Preferences appear as assignment object properties. Object preferences are similar to System preferences but allow you to define how Assignment Manager behaves for each object, rather than system preferences that apply to all objects.

Table 35 shows the system preferences used in Territory Assignment and the system preferences used in Assignment Manager.

Table 35. Comparison of System Preferences

Territory Assignment System Preferences (Version 4 or 4.x)	Assignment Manager Compatibility (Version 5 and Higher)
Allow User Exclusive	Lock Assignment Column in Siebel Tools Assignment Object
Assignee of Unowned	Default Employee, Default Employee, or Default Organization
Copy Opportunity Revenue	Position Team Copy Columns in Assignment Object
Keep Creator	Keep Creator Flag
Keep Manually Assigned	Keep Manual Assigned Flag
(Re)determine Primary Rep	Set Primary Position or Set Primary Employee Flag
Update or Add To	Add Team Members Flag

Tables Compatibility

Table 36 shows the tables used in Territory Assignment and the tables used in Assignment Manager.

Table 36. Comparison of Tables

Territory Assignment Tables (Version 4 or 4.x)	Assignment Manager Compatibility (Version 5 and Higher)
S_TERR	S_ASGN_GRP
S_TERR_ITEM	S_ASGN_RULE

Command Line Options Compatibility

Table 37 shows the command-line options used in Territory Assignment and the corresponding options used in Assignment Manager.

Table 37. Comparison of Command Line Options

Territory Assignment Command-Line Options (Version 4 or 4.x)	Assignment Manager Compatibility (Version 5 and Higher)
/Address 0 /Address 1 /Address 2	Set in Assignment Attribute columns. For the Opportunity Workflow Policy Object, you can specify workflow components for the Opportunity's primary address or the Opportunity's primary account address. To generate the same results as using: ■ /Address 0 (use both Opportunity and Account primary addresses), set Workflow Components Opportunity Primary Address to Active, and set Primary Account Address to Active. ■ /Address 1 (use Opportunity primary address only), set Workflow Components Opportunity Primary Address to Active, and set Primary Account Address to Inactive. ■ /Address 2 (use Account primary address only), set Workflow Components Opportunity Primary Address to Inactive, and set Primary Account Address to Active. You must also inactivate the corresponding Assignment Attribute columns of the component under the workflow policy object. After this step is finished, recompile the .srf file and, if you are using dynamic assignment, regenerate triggers. In Version 4.x, Territory Assignment uses the Account primary address for assignments of the Account object. In Version 5 and higher, Assignment Manager uses all addresses for assignments of the Account object.
/Bypass	Use Batch Assignment to reassign existing objects.
/Group	Use Batch Assignment with WHERE clauses.
/Ignore	Ignore the Extra Attributes flag on Siebel Tools Assignment Object.

Table 37. Comparison of Command Line Options

Territory Assignment Command-Line Options (Version 4 or 4.x)	Assignment Manager Compatibility (Version 5 and Higher)
/Indirect	Set in Assignment Attribute columns. For the Opportunity Workflow Policy Object, you can specify workflow components for the Opportunity's indirect accounts. To generate the same results as using: ■ /Indirect YES (use attributes from the opportunity's indirect accounts), set all Workflow Components named Indirect Account to Active. ■ /Indirect NO (do not use attributes from the opportunity's indirect accounts), set all Workflow Components named Indirect Account to Inactive. Note: You need to change this option for the Account ID Assignment Attribute. The default value for Opportunity's indirect accounts (Opportunity/Indirect Account and Indirect Account Synonym) are inactive in the Assignment Attribute Column. Also, the Opportunity/Indirect Account and Indirect Account Synonym Workflow Components for the Opportunity Workflow Object are active by default.
/KeepCreator	Set the Keep Creator flag on Siebel Tools Assignment Object.
/Mode	Use one or more Workflow Monitors to process requests for assignment objects. Use the Group Name parameter to specify the name of the assignment policy group to assign. The assignment policy group specifies the list of assignment objects to dynamically assign. When running Batch Assignment, use the assignment object parameter to specify the name of the assignment object to assign.
/OutputFile	No longer applicable. Output goes to Siebel Server trace files.
/NumRec	Use Workflow Monitor to specify the number of requests per iteration.
/Phase	Not used at this time. Use Workflow Monitor to detect requests.
/PrimaryAddressId	Not used at this time.
/PrimaryRep	Set Primary Position or Set Primary Employee Flag on Siebel Tools Assignment Object.
/RecID	Use batch mode with a WHERE clause.
/RollBack	Use the SIEBEL_ROLLBACK_SEG environment variable to specify rollback segments for Siebel Server tasks.
/RunTotal	No longer applicable.

Table 37. Comparison of Command Line Options

Territory Assignment Command-Line Options (Version 4 or 4.x)	Assignment Manager Compatibility (Version 5 and Higher)
/Sleep	Now applicable only in Dynamic Assignment, and the parameter is Sleep Time in Workflow Monitor.
/Synch	No longer applicable.

Assignment Object Parameters A

Siebel Assignment Manager uses definitions in the Siebel repository to assign objects to assignment rules and candidates. The predefined definitions include mappings for the most commonly used attributes for each object. Each assignment object uses its own set of run-time parameters that control the behavior of Assignment Manager for that assignment object. These run-time parameters are stored in the Siebel repository in the assignment object definitions. This appendix includes usage comments and tables for the assignment object run-time parameters and their default values.

To configure assignment objects, you need to modify their run-time parameters using Siebel Tools. For procedures on how to configure assignment objects, see "Configuring Assignment Objects" on page 100.

Assignment Object Parameter Usage

Table 38 shows the usage comments for the object run-time parameters.

NOTE: The run-time parameter name is shown as it appears in the Siebel Tools Assignment Objects list applet. The property name is shown as it is appears in the Siebel Tools Properties window. In this table, the property name for a parameter is shown only if the property name differs from the run-time parameter name.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Assignment Mode		Determines whether or not Assignment Manager performs filtering based on organizations or people. Valid values are: Independent, Org & Person-oriented, Organization-oriented, and Person-oriented.
Assignment Scoring Mode		If this parameter is set to Person-based (the default), the assignment rule score is set to the score of the highest-scoring employee or position for the rule. If this parameter is set to Organization-based, the assignment rule score is set to the score of the highest-scoring organization for the rule.
Auto Reassign		When this parameter is checked—parameter equals TRUE—Assignment Manager automatically reassigns objects if assignment attribute values change. The Generate Triggers server task looks for this flag when it generates triggers for the active assignment policy. If the parameter is unchecked—parameter equals FALSE—no trigger is created for the update; the assignment occurs once when the record is inserted. The default value is TRUE.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Calendar Activity Additional Fields		A string that provides extra information for use when creating an activity through availability-based assignment. This string follows a format of “parent field”, “field 1", “value1”, “field 2", “value2”.
Calendar Create Activity		When this parameter is checked—parameter equals TRUE—Assignment Manager creates an activity in the employee calendar of every final assignee, blocking off the time needed to finish the task. When this parameter is not checked—parameter equals FALSE—no activity is created in the employee calendar.
Calendar Duration Column		The table column that references the duration of the object. This column is required for availability-based assignment.
Calendar Early Start Time Column		The table column that references the early start time of the object. This column can be used for availability-based assignment but is optional.
Calendar Start Time Column		The table column of the assignment object that references the start time of the object. This column is required for availability based assignment
Default Employee		Assignment Manager assigns this employee when a conflict or a tie occurs and the appropriate employees cannot be assigned. If the Default Employee property for an assignment object is not specified and all rules have failed for a request for that assignment object, Assignment Manager sets the owner id field in the object row to No Match Row Id.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Default Organization	Default Org	Assignment Manager assigns this organization when a conflict or a tie occurs and the appropriate organizations cannot be assigned. If the Default Organization property for an assignment object is not specified and all rules have failed for a request for that assignment object, Assignment Manager sets the owner id field in the object row to No Match Row Id.
Default Position		Assignment Manager assigns this position when a conflict or a tie occurs and the appropriate positions cannot be assigned. If the Default Position property for an assignment object is not specified and all rules have failed for a request for that assignment object, Assignment Manager sets the owner id field in the object row to No Match Row Id. When the Default Position property of an assignment object is set to null and that object does not qualify for any defined assignment rules, then Assignment Manager does not set Primary position on the object.
Employee Column		Name of the column in the employee intersection table that points to rows in the employee table (S_EMPLOYEE).
Employee Primary Column		Name of the column in the primary table that stores the primary employee (on a team) or single-owner employee.
Employee Primary Denorm Column		Name of the column in the primary table that specifies whether the primary employee is assigned by the denorm program.
Employee Primary Manual Column		Name of the column in the primary table that specifies whether the primary employee is manually assigned.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Employee Primary System Column		Name of the column in the primary table that specifies whether the primary employee is system assigned.
Employee Table		Name of the employee intersection table. If the assignment object can be assigned to multiple employees, this intersection table stores the set of employee IDs that are assigned to assignment object IDs.
Employee Team Copy Columns	Employee Primary Column List	Comma-separated list of column names in the employee intersection table that should be copied when the primary employee changes. Assignment Manager copies values from these columns from the old primary employee to the new primary employee.
Employee Team Denorm Column	Employee Denorm Column	Name of the column in the employee intersection table that specifies whether the employee is assigned by the denorm program.
Employee Team Manual Column	Employee Manual Column	Name of the column in the employee intersection table that specifies whether the employee is manually assigned.
Employee Team Score Column		Numeric column in assignment object team table that stores the score of the assigned employee.
Employee Team System Column	Employee System Column	Name of the column in the employee intersection table that specifies whether the employee is system assigned.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Ignore Extra Attributes	Ignore Assignment Attributes	When this parameter is checked, Assignment Manager ignores the assignment criteria that are not relevant to the assignment object being assigned. For example, if you have an assignment rule that uses Service Request Priority as an assignment criteria, Assignment Manager ignores this assignment criteria when assigning opportunities and accounts because Service Request Priority is relevant only to service requests. When this parameter is unchecked, the assignment rule fails.
Inactive		When this parameter is checked—parameter equals TRUE—the object is no longer enabled (active). By default, this parameter is set to FALSE.
Keep Creator		When this parameter is checked, Assignment Manager never deletes the object creator from the team.
Keep Man Asgn Primary Org		For teams only. When this parameter is checked, Assignment Manager does not set the primary organization if the user explicitly sets the primary organization; Assignment Manager actually checks the Primary Organization manual flag in the object's primary table. By default, this manual flag is unchecked when the object is first created.
Keep Manual Assigned	Keep User Assigned	For teams only. When this parameter is checked, Assignment Manager keeps manually assigned assignees and assignment rules.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Keep Manual Primary Employee	Keep Man Asgn Primary Employee	When this parameter is checked, Assignment Manager does not set the primary employee if the user explicitly sets the primary employee; Assignment Manager actually checks the Primary Employee manual flag in the object's primary table. By default, this manual flag is unchecked when the object is first created.
Keep Manual Primary Position	Keep Man Asgn Primary Position	When this parameter is checked, Assignment Manager does not set the primary position if the user explicitly sets the primary position; Assignment Manager actually checks the Primary Position manual flag in the object's primary table. By default, this manual flag is unchecked when the object is first created. For more information about setting the primary position, see the run-time parameter "Set Primary Position" on page 287.
Keep Manual Primary Rule	Keep Man Asgn Primary Group	For teams only. When this parameter is checked, Assignment Manager does not set the primary rule if the user explicitly sets the primary rule; Assignment Manager actually checks the Primary Assignment Rule manual flag in the object's primary table. By default, this manual flag is unchecked when the object is first created.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Lock Assignment Column	Exclude Column	When this parameter is set to a column name, the object is not assigned or reassigned if the column value is TRUE. If you want Assignment Manager to assign or reassign the object, set this parameter to null, or set the column value to FALSE. This column is not a property of the assignment object itself, but a property of the business component associated with the assignment object. *Note:* Every assignment object base table has an ASGN_USR_EXCLD_FLG column, and for some objects, this column is exposed in the Siebel application as a field named Lock Assignment. However, for assignment objects that do not have this column exposed, you can query the database for the ASGN_USR_EXCLD_FLG column in the appropriate table.
Organization Table	Org Table	Name of the organization intersection table. If the assignment object can be assigned to multiple organizations, this intersection table stores the set of organization IDs that are assigned to assignment object IDs.
Org Column		Name of the column in the organization intersection table that points to rows in the organization table (S_ORG_INT).
Org Denorm Column		Name of the column in the organization intersection table that specifies whether the organization is assigned by the denorm program.
Org Manual Column		Name of the column in the organization intersection table that specifies whether the organization is manually assigned.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Org Primary Column		Name of the column in the primary table that stores the primary organization (on a team) or single-owner organization. To prevent organization assignment for an object, set this property to null.
Org Primary Column List		Comma-separated list of column names in the organization intersection table that should be copied when the primary organization changes. Assignment Manager copies values from these columns from the old primary organization to the new primary organization.
Org Primary Denorm Column		Name of the column in the primary table that specifies whether the primary organization is assigned by the denorm program.
Org Primary Manual Column		Name of the column in the primary table that specifies whether the primary organization is manually assigned.
Org Primary System Column		Name of the column in the primary table that specifies whether the primary organization is system assigned.
Org System Column		Name of the column in the organization intersection table that specifies whether the organization is system assigned.
Org Team Score Column		Numeric column in assignment object team table that stores the score of the assigned organization.
Position Column		Name of the column in the position intersection table that points to rows in the position table (S_POSTN).
Position Primary Column		Name of the column in the primary table that stores the primary position (for teams) or single-owner position.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Position Primary Denorm Column		Name of the column in the primary table that specifies whether the primary position is assigned by the denorm program.
Position Primary Manual Column		Name of the column in the primary table that specifies whether the primary position is manually assigned.
Position Primary System Column		Name of the column in the primary table that specifies whether the primary position is system assigned.
Position Table		Name of the position intersection table. If the assignment object can be assigned to multiple positions, this intersection table stores the set of position IDs that are assigned to assignment object IDs.
Position Team Copy Columns	Position Primary Column List	Comma-separated list of column names in the position intersection table that should be copied when the primary position changes. Assignment Manager copies values from these columns from the old primary position to the new primary position.
Position Team Denorm Column	Position Denorm Column	Name of the column in the position intersection table that specifies whether the position is assigned by the denorm program.
Position Team Manual Column	Position Manual Column	Name of the column in the position intersection table that specifies whether the position is manually assigned.
Position Team Score Column		Numeric column in assignment object team table that stores the score of the assigned position.
Position Team System Column	Position System Column	Name of the column in the position intersection table that specifies whether the position is system assigned.
Primary Table		Base table of the assignment object.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Replace Team Members	Add Team Members	When this parameter is checked, Assignment Manager deletes existing candidates from the teams and deletes existing assignment rules in the assignment rule intersection table that do not qualify. When this parameter is unchecked, Assignment Manager never deletes existing candidates or assignment rules from the object, even if they do not qualify.
Rule Column	Group Column	Name of a row ID column in the rule intersection table that points to the Assignment Rule table (S_ASGN_RULE). This column serves as a foreign key to the Assignment Rule table, uniquely identifying a rule for each assignment entity-rule association.
Rule Primary Column	Group Primary Column	Name of the column in the primary table that stores the primary or single-owner rule.
Rule Primary Denorm Column	Group Primary Denorm Column	Name of the column in the primary table that specifies whether the primary rule is assigned by the denorm program.
Rule Primary Manual Column	Group Primary Manual Column	Name of the column in the primary table that specifies whether the primary rule is manually assigned.
Rule Primary System Column	Group Primary System Column	Name of the column in the primary table that specifies whether the primary rule is system assigned.
Rule Table	Group Table	Name of the rule intersection table.
Rule Team Copy Columns	Group Primary Column List	Comma-separated list of column names in the rule intersection table that should be copied when the primary rule changes. Assignment Manager copies values from these columns from the old primary rule to the new primary rule.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Rule Team Denorm Column	Group Denorm Column	Name of the column in the rule intersection table that specifies whether the rule is assigned by the denorm program.
Rule Team Manual Column	Group Manual Column	Name of the column in the rule intersection table that specifies whether the rule is manually assigned.
Rule Team System Column	Group System Column	Name of the column in the rule intersection table that specifies whether the rule is system assigned.
Set Primary Employee		For teams only. When this parameter is set to TRUE, Assignment Manager is enabled for setting a primary employee. You select the primary employee for an assignment rule in the Assignment Rules view. The primary employee is the highest-scoring employee in the highest-scoring assignment rule for the object being assigned.
Set Primary Org		For teams only. When this parameter is set to TRUE, Assignment Manager is enabled for setting a primary organization. You select the primary organization for an assignment rule in the Assignment Rules view. The primary organization is the highest-scoring organization in the highest-scoring assignment rule for the object being assigned.

Table 38. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Set Primary Position		For teams only. When this parameter is set to TRUE, Assignment Manager is enabled for setting a primary position. You select the primary position for an assignment rule in the Assignment Rules view. The primary position is the highest-scoring position in the highest scoring assignment rule for the object being assigned. NOTE: If the property for the assignment object is Set Primary Position = False, then the existing primary is *not* modified by Assignment Manager; the primary remains the same. If the property for the assignment object is Set Primary Position = True, then the existing primary *might be* modified by Assignment Manager. This behavior is irrespective of the value in the Keep Man Asgn Primary Position property.
Set Primary Rule	Set Primary Group	When this parameter is set to TRUE, Assignment Manager is enabled for setting a primary rule. You select the primary rule for an assignment rule in the Assignment Rules view. The primary assignment rule is the highest-scoring rule for the object being assigned.
Skill Item Table		Name of the skill item table. For more information about skill item tables, see "Using Skill Tables" on page 143.
Skill Table		Name of the skill table. For more information about skill tables, see "Using Skill Tables" on page 143.

Run-Time Parameter Default Values

This section includes tables that list the run-time parameters and their default values for the following predefined assignment objects. For a procedure that explains how to view these objects and values, see "To view values for an assignment object" on page 289.

- Account (see Table 39 on page 290)
- Activity (see Table 40 on page 295)
- Campaign (see Table 41 on page 300)
- Campaign Contact (see Table 42 on page 305)
- Contact (see Table 43 on page 310)
- Contact Denormalization (see Table 44 on page 315)
- Employee (see Table 45 on page 320)
- Opportunity (see Table 46 on page 325)
- Order (Sales Credit Assignment) (see Table 47 on page 330)
- Organization (see Table 48 on page 335)
- Position (see Table 49 on page 340)
- Product Defect (see Table 50 on page 345)
- Product Denormalization (see Table 51 on page 350)
- Project (see Table 52 on page 355)
- Project Team (see Table 53 on page 360)
- Service Request (see Table 54 on page 365)

To view values for an assignment object

1. Start Siebel Tools.
2. In the Object Explorer, expand Workflow Policy Object.

   TIP: If Workflow Policy Object is not visible in the Object Explorer, you can enable it by selecting View > Options > Object Explorer in the Development Tools Options dialog box.

3. In the Workflow Policy Objects window, select the assignment object.

   NOTE: Objects are listed alphabetically by parent name of the assignment object.

4. In the Object Explorer, select Assignment Object.

   The values for the assignment object appear in the Assignment Objects list applet as well as the Properties window.

Account Object Parameters

Table 39 shows the run-time parameters and their default values for the Account assignment object. For descriptions and usage comments of some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 39. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Person-based
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	Default Organization
Default Position	Siebel Administrator
Employee Column	

Table 39. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	TERR_ID
Group Denorm Column (Rule Team Denorm Column)	ASGN_DNRM_FLG
Group Manual Column (Rule Team Manual Column)	ASGN_MANL_FLG
Group Primary Column (Rule Primary Column)	PR_TERR_ID
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 39. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	ASGN_SYS_FLG
Group Table (Rule Table)	S_ORG_TERR
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	TRUE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	BU_ID
Org Denorm Column	
Org Manual Column	
Org Primary Column	BU_ID
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 39. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	S_ORG_BU
Org Team Score Column	
Parent Name	Account
Position Column	POSITION_ID
Position Denorm Column (Position Team Denorm Column)	ASGN_DNRM_FLG
Position Manual Column (Position Team Manual Column)	ASGN_MANL_FLG
Position Primary Column	PR_POSTN_ID
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	PR_REP_DNRM_FLG
Position Primary Manual Column	PR_REP_MANL_FLG
Position Primary System Column	PR_REP_SYS_FLG
Position System Column (Position Team System Column)	ASGN_SYS_FLG
Position Table	S_ACCNT_POSTN
Position Team Score Column	
Primary Table	S_ORG_EXT
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	TRUE

Table 39. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	TRUE
Skill Item Table	S_ORG_SKILL_IT
Skill Table	S_ORG_SKILL

Activity Object Parameters

Table 40 on page 295 shows the run-time parameters and their default values for the Activity assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

The Lock Assignment parameter for Activity objects is, by default, set to TRUE. This setting does not allow Assignment Manager to assign these objects. The Field Service Activity object is the one exception and is, by default, available for assignment (Lock Assignment field value is set to FALSE). Other activities must have the Lock Assignment parameter set to FALSE or null for assignment to occur. This behavior is due to a setting in the Post Default Value property for the Action business component's Assignment Excluded field (Business Component > Field > Assignment Excluded). The value in the property is:

```
Expr: "IIf ([Class] = LookupValue(""FS_ACTIVITY_CLASS"", ""Field
Engineer Activity"") OR  [Class] = LookupValue
(""FS_ACTIVITY_CLASS"", ""Repair Activity"") OR [Class] =
LookupValue(""FS_ACTIVITY_CLASS"", ""Preventive Maintenance""),
""N"", ""Y"")"
```

For information about how to set the default value for activity assignment objects, see "Setting the Lock Assignment Default Value for Activity Assignment Objects" on page 264.

Table 40. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	

Table 40. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	APPT_DURATION_MIN
Calendar Early Start Time Column	
Calendar Start Time Column	APPT_START_DT
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	
Default Position	Siebel Administrator
Employee Column	EMP_ID
Employee Denorm Column (Employee Team Denorm Column)	ASGN_DNRM_FLG
Employee Manual Column (Employee Team Manual Column)	ASGN_MANL_FLG
Employee Primary Column	OWNER_PER_ID
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	ASGN_DNRM_FLG
Employee Primary Manual Column	ASGN_MANL_FLG
Employee Primary System Column	ASGN_SYS_FLG
Employee System Column (Employee Team System Column)	ASGN_SYS_FLG
Employee Table	S_ACT_EMP
Employee Team Score Column	

Table 40. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	ASGN_SYS_FLG
Group Table (Rule Table)	S_ORG_TERR
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	TRUE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	FALSE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE

Table 40. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	FALSE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Activity
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	

Table 40. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_EVT_ACT
Set Primary Employee	TRUE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	S_ACT_SKILL_IT
Skill Table	S_ACT_SKILL

Campaign Object Parameters

Table 41 shows the run-time parameters and their default values for the Campaign assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 41. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	
Default Position	Siebel Administrator
Employee Column	

Table 41. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	TERR_ID
Group Denorm Column (Rule Team Denorm Column)	ASGN_DNRM_FLG
Group Manual Column (Rule Team Manual Column)	ASGN_MANL_FLG
Group Primary Column (Rule Primary Column)	PR_TERR_ID
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 41. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	ASGN_SYS_FLG
Group Table (Rule Table)	S_SRC_TERR
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	TRUE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 41. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Campaign
Position Column	POSITION_ID
Position Denorm Column (Position Team Denorm Column)	ASGN_DNRM_FLG
Position Manual Column (Position Team Manual Column)	ASGN_MANL_FLG
Position Primary Column	PR_POSTN_ID
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	PR_REP_DNRM_FLG
Position Primary Manual Column	PR_REP_MANL_FLG
Position Primary System Column	PR_REP_SYS_FLG
Position System Column (Position Team System Column)	ASGN_SYS_FLG
Position Table	S_SRC_POSTN
Position Team Score Column	
Primary Table	S_SRC
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	FALSE

Table 41. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	TRUE
Skill Item Table	S_CAMP_SKILL_IT
Skill Table	S_CAMP_SKILL

Campaign Contact Object Parameters

Table 42 shows the run-time parameters and their default values for the Contact assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The parent name for the Campaign Contact assignment object is Campaign Contact Owner (not Campaign Contact).

The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 42. Campaign Contact

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	Organization-oriented
Assignment Scoring Mode	Person-based
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	
Default Org (Default Organization)	Default Organization

Table 42. Campaign Contact

Run-Time Parameter	Default Value
Default Position	Siebel Administrator
Employee Column	
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	

Table 42. Campaign Contact

Run-Time Parameter	Default Value
Group Primary Denorm Column (Rule Primary Denorm Column)	
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	FALSE
Keep User Assigned (Keep Manual Assigned)	FALSE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	BU_ID
Org Primary Column List	

Table 42. Campaign Contact

Run-Time Parameter	Default Value
Org Primary Denorm Column	
Org Primary Manual Column	
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Campaign Contact Owner
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	POSTN_ID
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	PR_REP_DNRM_FLG
Position Primary Manual Column	PR_REP_MANL_FLG
Position Primary System Column	PR_REP_SYS_FLG
Position System Column (Position Team System Column)	ASGN_SYS_FLG
Position Table	
Position Team Score Column	
Primary Table	S_CAMP_CON
Set Primary Employee	FALSE

Table 42. Campaign Contact

Run-Time Parameter	Default Value
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	
Skill Table	

Contact Object Parameters

Table 43 shows the run-time parameters and their default values for the Contact assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 43. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Person-based
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	Default Organization
Default Position	Siebel Administrator
Employee Column	

Table 43. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	TERR_ID
Group Denorm Column (Rule Team Denorm Column)	ASGN_DNRM_FLG
Group Manual Column (Rule Team Manual Column)	ASGN_MANL_FLG
Group Primary Column (Rule Primary Column)	PR_TERR_ID
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 43. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	ASGN_SYS_FLG
Group Table (Rule Table)	S_CON_TERR
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	TRUE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	BU_ID
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 43. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Contact
Position Column	POSTN_ID
Position Denorm Column (Position Team Denorm Column)	ASGN_DNRM_FLG
Position Manual Column (Position Team Manual Column)	ASGN_MANL_FLG
Position Primary Column	PR_POSTN_ID
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	PR_REP_DNRM_FLG
Position Primary Manual Column	PR_REP_MANL_FLG
Position Primary System Column	PR_REP_SYS_FLG
Position System Column (Position Team System Column)	ASGN_SYS_FLG
Position Table	S_POSTN_CON
Position Team Score Column	
Primary Table	S_CONTACT
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	TRUE

Table 43. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	TRUE
Skill Item Table	S_CON_SKILL_IT
Skill Table	S_CON_SKILL

Contact Denormalization Object Parameters

Table 44 shows the run-time parameters and their default values for the Contact Denormalization assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 44. Contact Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	
Default Org (Default Organization)	
Default Position	
Employee Column	

Table 44. Contact Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 44. Contact Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	TRUE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 44. Contact Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Contact Denormalization
Position Column	POSTN_ID
Position Denorm Column (Position Team Denorm Column)	ASGN_DNRM_FLG
Position Manual Column (Position Team Manual Column)	ASGN_MANL_FLG
Position Primary Column	PR_POSTN_ID
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	PR_REP_DNRM_FLG
Position Primary Manual Column	PR_REP_MANL_FLG
Position Primary System Column	PR_REP_SYS_FLG
Position System Column (Position Team System Column)	ASGN_SYS_FLG
Position Table	S_POSTN_CON
Position Team Score Column	
Primary Table	S_CONTACT
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 44. Contact Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	
Skill Table	

Employee Object Parameters

Table 45 shows the run-time parameters and their default values for the Employee assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 45. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	
Default Position	SADMIN
Employee Column	

Table 45. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	
Group Primary Manual Column (Rule Primary Manual Column)	

Table 45. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	FALSE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	
Org Primary System Column	

Table 45. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Employee
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_USER
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE

Table 45. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
Skill Item Table	S_EMP_SKILL_IT
Skill Table	S_EMP_SKILL

Opportunity Object Parameters

Table 46 shows the run-time parameters and their default values for the Opportunity assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 46. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Person-based
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	Default Organization
Default Position	Siebel Administrator
Employee Column	

Table 46. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	TERR_ID
Group Denorm Column (Rule Team Denorm Column)	ASGN_DNRM_FLG
Group Manual Column (Rule Team Manual Column)	ASGN_MANL_FLG
Group Primary Column (Rule Primary Column)	PR_TERR_ID
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 46. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	ASGN_SYS_FLG
Group Table (Rule Table)	S_OPTY_TERR
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	TRUE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	FALSE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	TRUE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	BU_ID
Org Denorm Column	
Org Manual Column	
Org Primary Column	BU_ID
Org Primary Column List	
Org Primary Denorm Column	PR_BU_DNRM_FLG
Org Primary Manual Column	PR_BU_MANL_FLG

Table 46. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	PR_BU_SYS_FLG
Org System Column	
Org Table (Organization Table)	S_OPTY_BU
Org Team Score Column	
Parent Name	Opportunity
Position Column	POSITION_ID
Position Denorm Column (Position Team Denorm Column)	ASGN_DNRM_FLG
Position Manual Column (Position Team Manual Column)	ASGN_MANL_FLG
Position Primary Column	PR_POSTN_ID
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	PR_REP_DNRM_FLG
Position Primary Manual Column	PR_REP_MANL_FLG
Position Primary System Column	PR_REP_SYS_FLG
Position System Column (Position Team System Column)	ASGN_SYS_FLG
Position Table	S_OPTY_POSTN
Position Team Score Column	
Primary Table	S_OPTY
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	TRUE

Table 46. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	TRUE
Skill Item Table	S_OPTY_SKILL_IT
Skill Table	S_OPTY_SKILL

Order (Sales Credit Assignment) Object Parameters

Table 47 shows the run-time parameters and their default values for the Order assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276. For more information about sales credit assignment, see *Siebel Incentive Compensation Administration Guide*.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 47. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	
Default Org (Default Organization)	
Default Position	

Table 47. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Column	
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	
Group Column (Rule Column)	ASGN_GRP_ID
Group Denorm Column (Rule Team Denorm Column)	ASGN_DNRM_FLG
Group Manual Column (Rule Team Manual Column)	ASGN_MANL_FLG
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 47. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	ASGN_SYS_FLG
Group Table (Rule Table)	S_ORDER_ASGNGRP
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	FALSE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	FALSE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	FALSE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 47. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Order
Position Column	POSTN_ID
Position Denorm Column (Position Team Denorm Column)	ASGN_DNRM_FLG
Position Manual Column (Position Team Manual Column)	ASGN_MANL_FLG
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	PR_REP_DNRM_FLG
Position Primary Manual Column	PR_REP_MANL_FLG
Position Primary System Column	PR_REP_SYS_FLG
Position System Column (Position Team System Column)	ASGN_SYS_FLG
Position Table	S_ORD_CRDT_ASGN
Position Team Score Column	
Primary Table	S_ORDER
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 47. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	
Skill Table	

Organization Object Parameters

Table 48 shows the run-time parameters and their default values for the Organization assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 48. Organization Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	
Default Org (Default Organization)	
Default Position	
Employee Column	

Table 48. Organization Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 48. Organization Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	FALSE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 48. Organization Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Organization
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_BU
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 48. Organization Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	S_BU_SKILL_IT
Skill Table	S_BU_SKILL

Position Object Parameters

Table 49 shows the run-time parameters and their default values for the Position assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 49. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	
Default Position	SADMIN
Employee Column	

Table 49. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	
Group Primary Manual Column (Rule Primary Manual Column)	

Table 49. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	TRUE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	
Org Primary System Column	

Table 49. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Position
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_POSTN
Set Primary Employee	TRUE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	FALSE
Set Primary Position	TRUE

Table 49. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
Skill Item Table	S_POS_SKILL_IT
Skill Table	S_POS_SKILL

Product Defect Object Parameters

Table 50 shows the run-time parameters and their default values for the Product Defect assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 50. Product Defect Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	
Default Position	Siebel Administrator
Employee Column	

Table 50. Product Defect Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	OWNER_EMP_ID
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	ASGN_DNRM_FLG
Employee Primary Manual Column	ASGN_MANL_FLG
Employee Primary System Column	ASGN_SYS_FLG
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 50. Product Defect Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	FALSE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 50. Product Defect Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Product Defect
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_PROD_DEFECT
Set Primary Employee	TRUE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 50. Product Defect Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	
Skill Table	

Product Denormalization Object Parameters

Table 51 shows the run-time parameters and their default values for the Product Denormalization assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 51. Product Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	
Default Org (Default Organization)	
Default Position	
Employee Column	

Table 51. Product Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 51. Product Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	FALSE
Org Column	BU_ID
Org Denorm Column	
Org Manual Column	
Org Primary Column	BU_ID
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 51. Product Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	S_PROD_INT_BU
Org Team Score Column	
Parent Name	Product Denormalization
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_PROD_INT
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 51. Product Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	
Skill Table	

Project Object Parameters

Table 52 shows the run-time parameters and their default values for the Project assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 52. Project Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	
Default Position	
Employee Column	EMP_ID

Table 52. Project Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	ASGN_DNRM_FLG
Employee Manual Column (Employee Team Manual Column)	ASGN_MANL_FLG
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	ASGN_MANL_FLG
Employee Table	S_PROJ_PTL_RSRC
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 52. Project Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 52. Project Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Project
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_PROJ
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 52. Project Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	S_PROJ_SKILL_IT
Skill Table	S_PROJ_SKILL

Project Team Object Parameters

Table 53 shows the run-time parameters and their default values for the Project Team assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 53. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	
Default Position	
Employee Column	EMP_ID

Table 53. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	ASGN_DNRM_FLG
Employee Manual Column (Employee Team Manual Column)	ASGN_MANL_FLG
Employee Primary Column	
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	
Employee Primary Manual Column	
Employee Primary System Column	
Employee System Column (Employee Team System Column)	ASGN_SYS_FLG
Employee Table	S_PROJ_PTL_RSRC
Employee Team Score Column	SKILL_SCORE
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 53. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	FALSE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	FALSE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	TRUE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 53. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Project Team
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_PROJ_RSRC
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 53. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	S_PROJRSRC_SKLI
Skill Table	S_PROJRSRC_SKL

Service Request Object Parameters

Table 54 shows the run-time parameters and their default values for the Service Request assignment object. For descriptions and usage comments on some of these run-time parameters, see Table 38 on page 276.

NOTE: The run-time parameters are presented in the order they appear in the Siebel Tools Properties window. If the corresponding parameter name that appears in the Siebel Tools Assignment Objects list applet differs from the name shown in the Properties window, it is shown parenthetically. Parameters in the table that do not include a default value have a default value of null.

Table 54. Service Request Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	Person-based
Auto Reassign	TRUE
Calendar Activity Additional Fields	
Calendar Create Activity	
Calendar Duration Column	
Calendar Early Start Time Column	
Calendar Start Time Column	
Comments	
Default Employee	SADMIN
Default Org (Default Organization)	Default Organization
Default Position	Siebel Administrator
Employee Column	

Table 54. Service Request Object Run-Time Parameters

Run-Time Parameter	Default Value
Employee Denorm Column (Employee Team Denorm Column)	
Employee Manual Column (Employee Team Manual Column)	
Employee Primary Column	OWNER_EMP_ID
Employee Primary Column List (Employee Team Copy Columns)	
Employee Primary Denorm Column	ASGN_DNRM_FLG
Employee Primary Manual Column	ASGN_MANL_FLG
Employee Primary System Column	ASGN_SYS_FLG
Employee System Column (Employee Team System Column)	
Employee Table	
Employee Team Score Column	
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG
Group Column (Rule Column)	
Group Denorm Column (Rule Team Denorm Column)	
Group Manual Column (Rule Team Manual Column)	
Group Primary Column (Rule Primary Column)	
Group Primary Column List (Rule Team Copy Columns)	
Group Primary Denorm Column (Rule Primary Denorm Column)	

Table 54. Service Request Object Run-Time Parameters

Run-Time Parameter	Default Value
Group Primary Manual Column (Rule Primary Manual Column)	
Group Primary System Column (Rule Primary System Column)	
Group System Column (Rule Team System Column)	
Group Table (Rule Table)	
Ignore Assignment Attributes (Ignore Extra Attributes)	TRUE
Inactive	FALSE
Keep Creator	FALSE
Keep Man Asgn Primary Employee (Keep Manual Primary Employee)	TRUE
Keep Man Asgn Primary Group (Keep Manual Primary Rule)	TRUE
Keep Man Asgn Primary Org	TRUE
Keep Man Asgn Primary Position (Keep Manual Primary Position)	FALSE
Keep User Assigned (Keep Manual Assigned)	TRUE
Org Column	
Org Denorm Column	
Org Manual Column	
Org Primary Column	BU_ID
Org Primary Column List	
Org Primary Denorm Column	
Org Primary Manual Column	

Table 54. Service Request Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	
Parent Name	Service Request
Position Column	
Position Denorm Column (Position Team Denorm Column)	
Position Manual Column (Position Team Manual Column)	
Position Primary Column	
Position Primary Column List (Position Team Copy Columns)	
Position Primary Denorm Column	
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	
Primary Table	S_SRV_REQ
Set Primary Employee	TRUE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	TRUE

Table 54. Service Request Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	S_SR_SKILL_IT
Skill Table	S_SR_SKILL

Assignment Manager Error Messages

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This appendix explains the error codes and associated text that Assignment Manager may generate during processing.

Understanding Assignment Manager Error Messages

Table 55 lists the error codes, the message text, and a description of each error that Assignment Manager may generate during processing. For each error, Assignment Manager writes this information to the Assignment Manager log file (if you specified that one be used).

To view Assignment Manager error codes

1. Start Siebel Tools.
2. From the application-level menu, choose Screens > System Administration > Strings.
3. In the Message Key field in the Messages applet, query for ERR_ASG*.

   Error messages for all languages appear.

> **TIP:** If you want error messages only for a particular language to appear, specify that language (such as ENU for English) as part of your query.

Table 55 provides the Assignment Manager error codes.

Table 55. Assignment Manager Error Codes

Error Code	Error Text[1]	Resolution[2]
ERR_ASG_ALREADY_ASSIGNED	Assigned this object %1 (more recently than requested %2).	This is just information.
ERR_ASG_ASSIGN_REPLY	Selected %3 rules, %5 organizations, and %4 people for %1 (%2).	This is just information.
ERR_ASG_BASSIGN_REPLY	Assigned %1 rows for %2.	This is just information.
ERR_ASG_LOADING_OBJECT	Unable to load assignment object %1.	The configuration of the assignment object is not correct. Use Siebel Tools to check the configuration of the assignment object.
ERR_ASG_BDENORM_REPLY	Denormalized %1 rows for %2.	This is just information.

Table 55. Assignment Manager Error Codes

Error Code	Error Text[1]	Resolution[2]
ERR_ASG_CANNOT_ASSIGN_ LOCKED_ROW	Cannot assign this item because it is in a locked state. (Object Name = %1, Object Row Id = %2.)	If you want to assign this object, please uncheck the Lock Assignment field for the object being assigned. Otherwise, this is just information.
ERR_ASG_DENORM_REPLY	Denormalized %1 rows for %2.	This is just information.
ERR_ASG_DUP_CONFLICT	Unable to update row (%1) because updated values violate unique index with an existing row (%2).	Check the data on your team table on the object row_ID where it failed.
ERR_ASG_INVALID_BU_ DFLT_NAME	Default organization %1 for assignment object %2 is not found in the organizations table. Please check that Default Organization - %1 is a valid organization.	Use Siebel Tools to set the Default Organization parameter for the assignment object to a valid organization in the database.
ERR_ASG_INVALID_EMP_ DFLT_NAME	Default employee %1 for assignment object %2 is not found in the employees table.	Use Siebel Tools to set the Default Employee parameter for the assignment object to a valid employee in the database.
ERR_ASG_INVALID_POSTN_ DFLT_NAME	Default position %1 for assignment object %2 is not found in the positions table.	Use Siebel Tools to set the Default Position parameter for the assignment object to a valid position in the database.
ERR_ASG_INVALID_STORE_ COL_NUM	Assignment criteria attribute %1 has an invalid store column.	Check the Store Column value for your assignment criteria attribute and make sure it lies between 1 and 4.
ERR_ASG_INVALID_WF_ LINK_COL	Assignment attribute column (%1) references invalid workflow component column (%2).	Check the Workflow Policy Component Column property of the assignment attribute column, and make sure it points to a valid and active workflow policy component column.

Table 55. Assignment Manager Error Codes

Error Code	Error Text[1]	Resolution[2]
ERR_ASG_ITEM_ATTR_HAS_NO_ATTR	Assignment Criteria %1, Assignment Criteria Attribute %2 has no attribute defined. Verify in Siebel Tools that the Assignment Criteria %1 has an assignment criteria attribute defined and active. Recompile the server repository file to apply changes made on assignment criteria configuration if necessary.	
ERR_ASG_ITEM_ATTR_HAS_NO_ITEM	Item(%2) not found for item attribute (%1). Please make sure that the item(%2) is active.	Make sure that the Parent Assignment Item Type of the Assignment Criteria Attribute(%1), points to a valid and active assignment criteria.
ERR_ASG_ITEM_NOT_FOUND	Assignment Criteria %1 has an invalid assignment attribute. Please check the assignment criteria configuration on Siebel Tools using the Validate tool, and note that it is a requirement to recompile the server SRF after adding or deleting assignment criteria records.	
ERR_ASG_LOADING_GROUP	Unable to load assignment rule %1 from the database. Please check the assignment rule definitions to make sure that all the required information is correct and press the Release button to recreate the rule cache data file.	
ERR_ASG_LOADING_OBJECT	Unable to load assignment object %1."	Check the configuration of the assignment object.

Table 55. Assignment Manager Error Codes

Error Code	Error Text[1]	Resolution[2]
ERR_ASG_LOV_VALUE_NOT_ FOUND	No LOV value found for Type [%1], Value [%2].	Make sure expertise values for skills are valid, belonging to LOV type EXPERTISE_CD (defined through Application Administration screens).
ERR_ASG_MATCHASSIGN_ REPLY	Qualified and selected %3 rules, %5 organizations, and %4 people for %1 (%2).	This is just information.
ERR_ASG_MATCH_REPLY	Qualified %3 rules, %5 organizations, and %4 people for %1 (%2).	This is just information.
ERR_ASG_NO_OBJ_COL_FOUND	Assignment object %1 has no columns.	
ERR_ASG_NOT_EMP_POSTN	Employee or Position not specified for assignment object %1.	If person-based assignment, make sure that at least one of the four properties (Position Table, Position Primary Column, Employee Table, Employee Primary Column) for assignment object %1 has a valid non-null value. If organization-based assignment, make sure that at least one of the two properties (Org Table, Org Primary Column) for assignment object %1 has a valid non-null value.
ERR_ASG_NO_WF_COLS_ IN_ATTR	Assignment attribute %1 has no workflow columns.	
ERR_ASG_NO_WF_OBJECT	No workflow object available for assign object = %1.	Make sure that the Parent Workflow Object property of the Assignment Object % points to a valid workflow object.

Table 55. Assignment Manager Error Codes

Error Code	Error Text[1]	Resolution[2]
ERR_ASG_OBJECT_NOT_FOUND	Assignment object %1 is not registered in the Siebel repository. Please make sure that %1 is a valid assignment object name and the value you input is identical to what you see in the application. Please review the Assignment Manager documentation for details on the required parameters before running an Assignment Manager task.	
ERR_ASG_PERSON_OBJECT_ NUM_ATTR_MISMATCH	Number of attributes do not match with assignment object for person object %1.	
ERR_ASG_PR_TBL_ROW_ NOT_FOUND	RowId [%1] in table [%2] not found.	Make sure that request submitted is for a valid Row Id in table (%2).
ERR_ASG_UPDATE_FAILED	Unable to update row %1 (%2).	Check the log file for database related error, and correct the error.
ERR_ASG_PARSING_VALUE	Unable to parse criteria value %1.	
ERR_ASGN_KEY_NO_MATCH	Assignment Key %1 does not match the Request Key.	Make sure that the AsgnKey parameter is set to the Row Id of one of the assignment groups mapped to the server.

1. The error text that appears in Table 55 is generic. However, for most errors, Assignment Manager generates more specific information about the exact cause of the error. Both the generic and the specific error messages appear in the Server Process Log; while only the specific error message appears in the Assignment Manager log file.
2. If the Resolution column is blank, this means either the error code is no longer applicable or the text of the error code is informative enough not to warrant a separate explanation for resolution.

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