SIEBEL 7
eBusiness

SIEBEL TERRITORY ASSIGNMENT MANAGER ADMINISTRATION GUIDE

MIDMARKET EDITION

VERSION 7.5

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Introduction

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

Several other server processes, not fully documented in this guide, play an integral role in Territory Assignment Manager functionality. The Siebel System Administration documentation, especially *Siebel Business Process Designer Administration Guide, MidMarket Edition,* should be used as an additional reference when using Territory Assignment Manager with these processes.

NOTE: All Siebel MidMarket product names include the phrase MidMarket Edition to distinguish this product from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name is given in abbreviated form. For example, after Siebel Call Center, MidMarket Edition, has been mentioned once, it is referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to ensure its proper identification and handling.

Who Should Use This Guide

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

What's New in This Release

Table 1 provides a brief overview of the new Territory Assignment Manager features for version 7.5 and where to find additional information about these features. In addition to the features that follow, many additional performance enhancements were incorporated for this release.

Table 1. New Territory Assignment Manager Features for Version 7.5

Feature	Description	For More Information
Date range criteria	This feature allows you to specify criteria so that Territory Assignment Manager searches for only items that are created within a specified period of time, providing another solution for finding the best possible match for a given item. Note: You configure the Date criteria as you would any other criteria.	See "Assignment Criteria Configuration" on page 63
New AsgnSrvr task parameter	This feature allows you to specify a WHERE clause for AsgnSrvr when starting a server task and is now available for Interactive Assignment.	See "Running Interactive Assignment Using the Command-Line SRVRMGR Utility" on page 129
New assignment objects	■ Campaign Contact ■ Order	See Appendix A, "Assignment Object Parameters"

NOTE: Your Siebel implementation may not have all the features described in this guide, depending on which software modules you have purchased.

Revision History

Siebel Territory Assignment Manager Administration Guide, MidMarket Edition, Version 7.5

Assignment Concepts 1

Siebel Territory 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, Territory Assignment Manager applies assignment rules that you define. For you to define assignment rules, you select:

- Objects to which each assignment rule applies
- Criteria for each assignment rule
- Values for each assignment criteria
- Candidates that are selected using the assignment rule

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

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

- Defining how attributes are matched by using:
  - Inclusion and exclusion methods
  - Wildcard values
- Creating and configuring your own components, including:
  - Objects
  - Assignment criteria
  - Criteria values
  - Assignment attributes
- Running Territory 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 Territory Assignment Manager works and how it can be configured to meet your organization's needs.

Territory Assignment Manager Components

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

Assignment Objects

In Siebel Territory 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 Territory Assignment Manager for the most commonly used business entities in Siebel eBusiness Applications MidMarket Edition. 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 50.

Candidates

In Siebel Territory 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 2 on page 16.

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.

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 2 on page 16.

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

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 2 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 2. Summary of Predefined Assignment Objects

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

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 50.

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 Territory 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.

Territory Assignment Manager supports only one type of assignment rule—All, Above Minimum. This rule assigns all objects that meet the specified criteria. Figure 1 shows an example of an assignment rule.

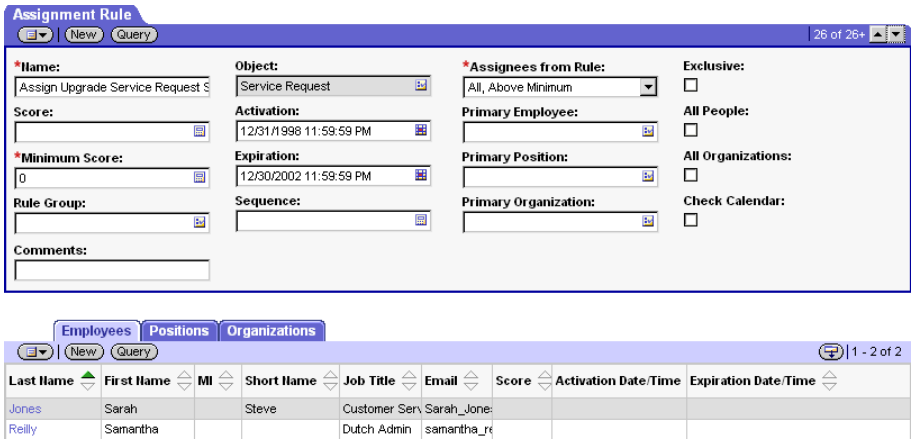


Figure 1. Sample Assignment Rule

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

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 a Compare to Object comparison method to determine if candidates meet the criteria. This comparison method compares criteria values to object attributes. Objects with the required criteria values qualify for this criteria.

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.

Table 3 shows the types of inclusion methods for assignment criteria.

Table 3. Assignment Criteria Inclusion Methods

Inclusion Method	Comments
Include	The object attribute must match at least one listed criteria value.
Include All	The object attribute must match all listed criteria values.
Include All Matching	Not used in the Siebel MidMarket product.
Exclude	The object attribute must not match any of the listed criteria values.

Siebel Territory 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 63.

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, MidMarket Edition*. For configuration details, see "Configuring MLOV for Assignment Attributes" on page 70.

Criteria Values

Criteria values are details associated with criteria that are compared to an object or candidate. 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 106.

Activity-Based Assignment

Territory 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, MidMarket Edition* (Workflow section) and *Siebel Communications Server Administration Guide, MidMarket Edition*.

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, MidMarket Edition*, *Siebel Communications Server Administration Guide, MidMarket Edition*, and *Siebel Tools Reference, MidMarket Edition*.

Multitiered Assignment

By default, Territory Assignment Manager independently matches people and organizations to assignment objects. Activating Territory 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 Territory 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 all qualified people and organizations, then assigns only those that have both a qualified person and related qualified organization.

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 61. For more information and examples of multitiered assignment, see, "Using Multitiered Assignment with Sales Assignment Rules" on page 35.

Assignment Operation Modes

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

- Interactive
- Dynamic
- Batch
- Mobile
- Contact Denormalization (available for Dynamic and Batch Assignments only)
- Product Denormalization (available for Dynamic and Batch Assignments only)

Interactive Assignment

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

NOTE: Mobile users running Territory 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 Territory 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 Territory 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 Territory 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, MidMarket Edition.*

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 Territory Assignment Manager in Contact Denormalization mode. For more information on Contact Denormalization, see "Contact Denormalization" on page 23.

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.

Territory 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 Territory 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, Territory 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 208.) 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.

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.

Territory 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 Territory 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 Territory Assignment Manager sets the default position as the new primary position.
3. If a default position is not defined, then Territory 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 Territory Assignment Manager in Contact Denormalization mode. Territory 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, Territory Assignment Manager runs Dynamic Assignment in Contact Denormalization mode. You can also configure Territory Assignment Manager to run Batch Assignment in this mode.

Product Denormalization

In Product Denormalization mode, Territory 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.

Territory 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 Territory 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 Territory Assignment Manager sets the default organization as the new primary organization.
3. If a default organization is not defined, then Territory Assignment Manager does not set a primary organization.

The Product Denormalization object is reserved to run Territory Assignment Manager in Product Denormalization mode. Territory 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. You can also configure Territory Assignment Manager to run Batch Assignment in this mode.

Assignment Strategy 2

To use Territory Assignment Manager for your organization, you must develop and document a clear set of strategies that can be consistently applied by Territory 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 employees. Expertise is managed using employees, positions, or organizations. Service organizations typically use this method.
- Reflect a blend of the attributes outlined in the two methods described above.

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

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 Territory 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, a major territory realignment can negatively affect your system resources. If the realignment is large, Territory 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.

To use Territory Assignment Manager for your sales organization, use the following views in the Assignment Administration screen:

- Territory Assignment List view
- Territory Assignment Detail view

NOTE: Do not use the Marketing Administration screen to create new territories.

Because sales organizations typically distribute their accounts and opportunities based on territories, these views create assignment rules based on territories. For this reason, the terms *assignment rules* and *territories* are used interchangeably in this section.

The Territory List view has been simplified to allow users to define their sales territories. To illustrate how Territory 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.

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 2. Territory Assignment Manager then assigns your salespeople depending on the geographic location of the sales opportunity.

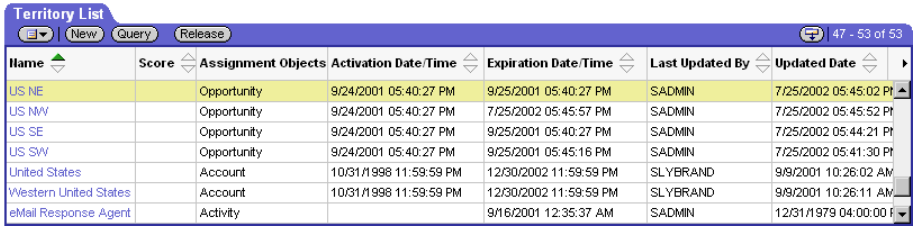


Figure 2. Example of Creating Sales Territories

To develop assignment rules based on territories

1 Create assignment rules as sales territories.

In this example, in the Territory List view, you create four assignment rules, one for each territory as shown in Figure 2.

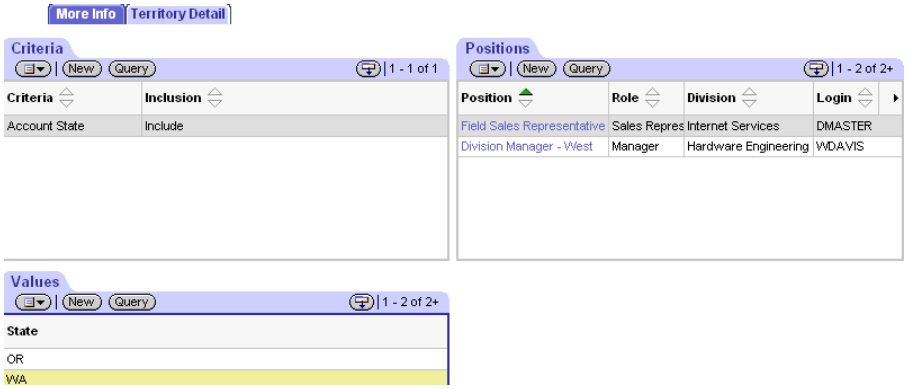
2 Determine the assignment criteria.

In this example, in the Criteria list in the Territory Details 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 Values list in the Territory Detail 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 Positions list in the Territory Details view, add the sales positions responsible for each territory. In this 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 Territory Assignment Rules" on page 100. For more information about assigning positions, see "Assigning Positions" on page 110.

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5 Release the assignment rules.

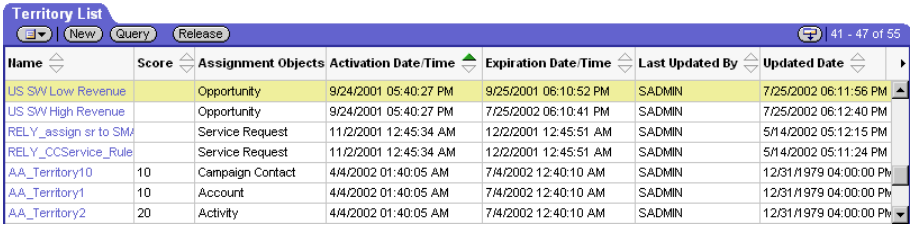
In the Territory List view, click the Release button. You can then run Batch Assignment to assign objects affected by the assignment rules. For more information about running Batch Assignment, see "Running Territory Assignment Manager in Batch Mode" on page 146.

After these assignment rules are released, Territory Assignment Manager assigns salespeople based on the geographic location of the sales opportunity. For example, a sales opportunity in Washington 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 Territory 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 3. Territory Assignment Manager then assigns your salespeople, depending on both the geographic location and the revenue potential of the sales opportunity.



Name	Score	Assignment Objects	Activation Date/Time	Expiration Date/Time	Last Updated By	Updated Date
US SW Low Revenue		Opportunity	9/24/2001 05:40:27 PM	9/25/2001 06:10:52 PM	SADMIN	7/25/2002 06:11:56 PM
US SW High Revenue		Opportunity	9/24/2001 05:40:27 PM	7/25/2002 06:10:41 PM	SADMIN	7/25/2002 06:12:40 PM
RELY_assign sr to SM		Service Request	11/2/2001 12:45:34 AM	12/2/2001 12:45:51 AM	SADMIN	5/14/2002 05:12:15 PM
RELY_CCService_Rule		Service Request	11/2/2001 12:45:34 AM	12/2/2001 12:45:51 AM	SADMIN	5/14/2002 05:11:24 PM
AA_Territory10	10	Campaign Contact	4/4/2002 01:40:05 AM	7/4/2002 12:40:10 AM	SADMIN	12/31/1979 04:00:00 PM
AA_Territory1	10	Account	4/4/2002 01:40:05 AM	7/4/2002 12:40:10 AM	SADMIN	12/31/1979 04:00:00 PM
AA_Territory2	20	Activity	4/4/2002 01:40:05 AM	7/4/2002 12:40:10 AM	SADMIN	12/31/1979 04:00:00 PM

Figure 3. Example of Creating Sales Territories 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 3.

2. Determine the assignment criteria.

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

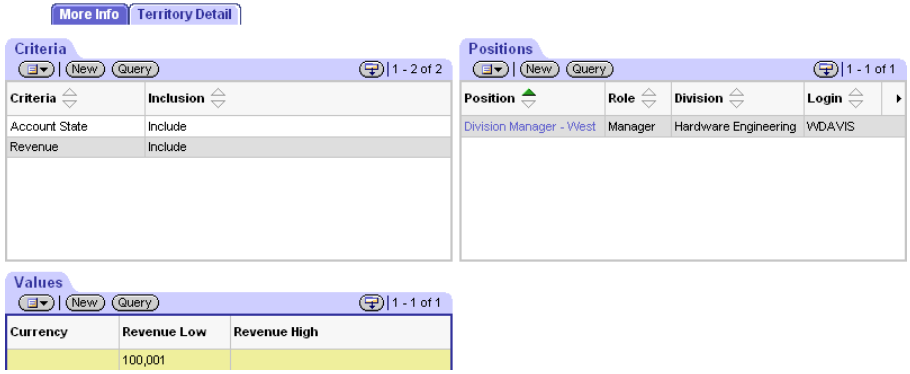
3 Define the criteria values.

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 Field Sales Representative.

The figure shown in Step 3 on page 33 shows an example of defining the US SW High Revenue assignment rule as described.

5 Release the assignment rules.

In the Territory List 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 Territory Assignment Manager in Batch Mode" on page 146.

After these assignment rules are released, Territory 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 20 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 61. 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, Territory 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.

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; only the Europe organization is assigned.

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; only the European Sales Representative is assigned.

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.

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 attributes 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 40 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.

   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.

   One assignment rule can match different candidates to various objects based on the object characteristics. To determine optimal assignment, determine the criteria that you wish to evaluate for each candidate. This is the primary type of criteria you use most frequently for implementing assignments in a customer service environment.

5 Define assignment rules, assignment criteria, and assignment criteria values.

   Using the strategy, rules, and criteria discussed above, define the assignment rules and the corresponding details using the Territory Assignment Administration views. In defining rules, criteria, and values, you can specify a candidate or candidates for an assignment rule.

6 Define candidates.

   Using the Assignment Rule Employees view, define the eligible employees for assignment.

7 Release assignment rules.

   In the Territory List 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 Territory Assignment Manager in Batch Mode" on page 146.

Figure 4 shows a sample assignment rule for assigning support representatives to a service request.

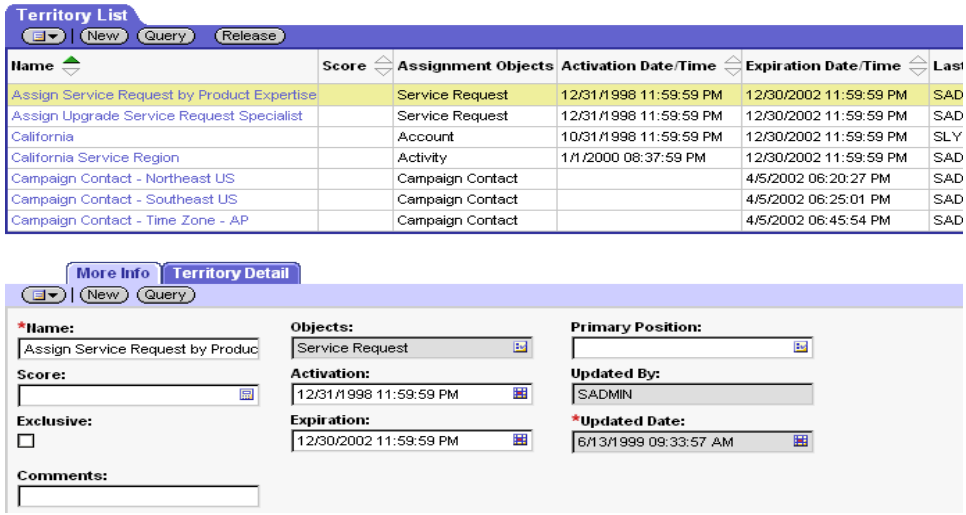


Figure 4. Assignment Rule for a Service Organization

Territory Assignment Manager Configuration 3

This chapter explains how to configure Territory 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 53.

- Create new assignment objects

  For more information, see "Creating Assignment Objects" on page 52.

- Define additional assignment criteria types and attributes

  For more information, see "Configuring Assignment Criteria" on page 74 and "Configuring Assignment Criteria Attributes" on page 77.

- Remove existing assignment criteria and attributes

  For more information, see "To remove seed assignment criteria" on page 64.

- Disable existing assignment attributes

  For more information, see "Disabling an Assignment Attribute" on page 82

- Create new workflow policy components

  For more information, see "Creating Workflow Policy Components" on page 84.

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

CAUTION: The criteria values are highly specialized. Do not configure these components.

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

CAUTION: The Siebel application does not support any change to original assignment objects, attributes, criteria, criteria attributes, or attribute columns. If your business need requires you to expand the functionality of these components, please copy these predefined objects and then make changes.

Territory 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.

Territory 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.

Territory Assignment Manager Object Types

The following object types are specific to Territory 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 50.
- **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 65.
- **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 71.
- **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 74.
- **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 77.

Territory Assignment Manager Object Hierarchy and Relationship

Use the Object Explorer in Siebel Tools to view the hierarchical (parent-child) relationships of Territory Assignment Manager object types. Figure 5 illustrates the hierarchical relationships of these object types (and two related object types in Workflow Manager configuration).

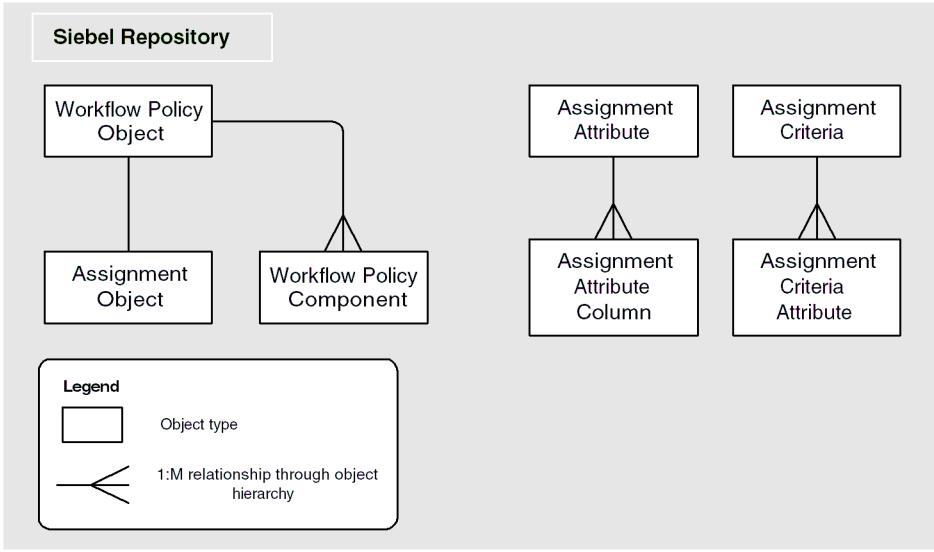


Figure 5. Parent-Child Relationships Between Territory Assignment Manager Object Types

Figure 5 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 Territory 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 6.

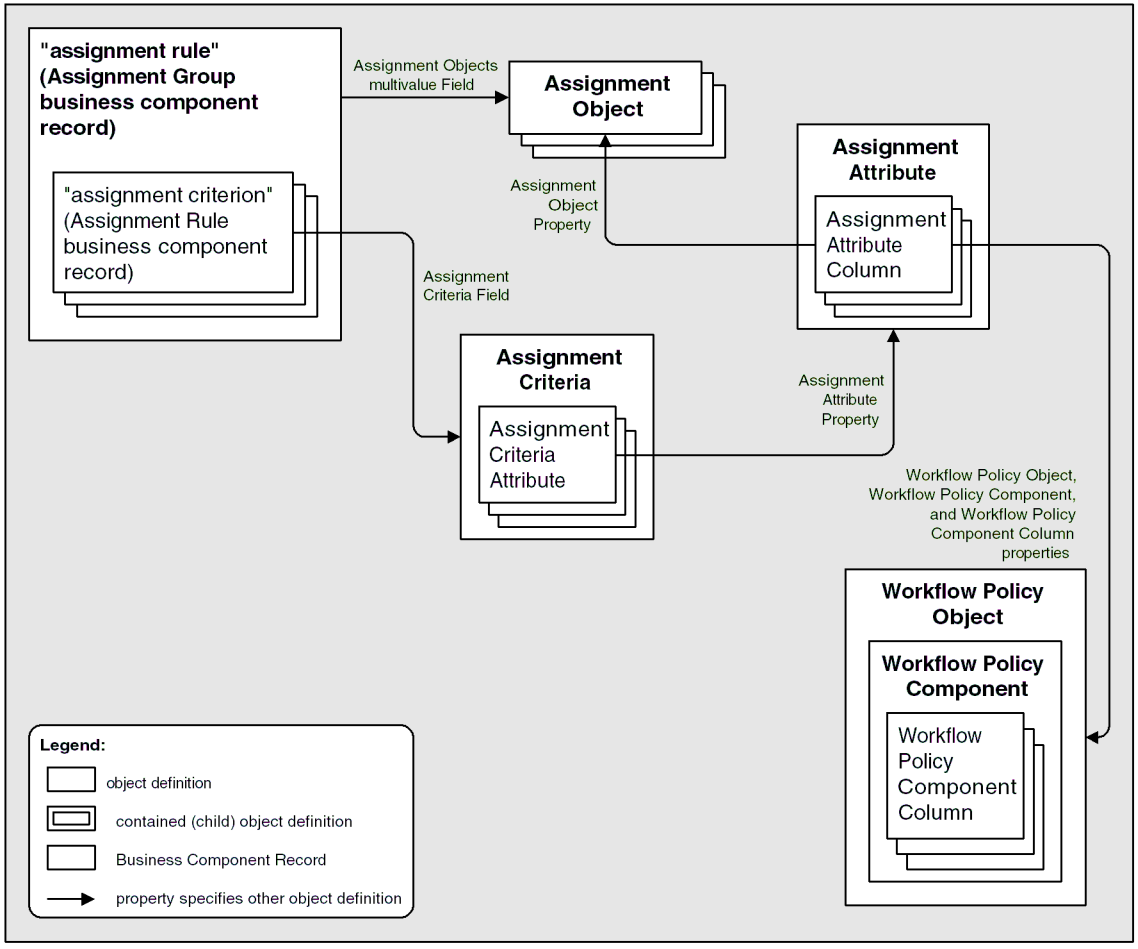


Figure 6. Field Value and Property Relationships Among Territory Assignment Manager Object Types

Figure 6 on page 48 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 all 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 Territory 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 98.

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 65.

NOTE: Siebel Tools allows the creation or configuration of an assignment object with both Position- and Employee-based assignment, but Territory 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 Territory Assignment Manager from assigning, or reassigning, a position or candidate to the object. For example, use this feature to exclude an object (such as Account or Opportunity) from being reassigned by Territory Assignment Manager. By setting the column defined in the Exclude Column for the assignment object, Territory Assignment Manager excludes (ignores) the Object for assignment.

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 Territory 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.
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 94.
7. If you are running dynamic assignment, activate an assignment policy for the assignment object.

   For more information, see "Activating Assignment Policies" on page 139.
8. Update your deployment with the new configurations.

   For instructions, see "Server Administration After Configuration" on page 93.

Configuring Assignment Objects

Each assignment object uses its own set of run-time parameters that control the behavior of Territory 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, 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 94 and Step 3 on page 95 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 8 on page 93 and *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Figure 7 shows an example of configuring the Account assignment object.

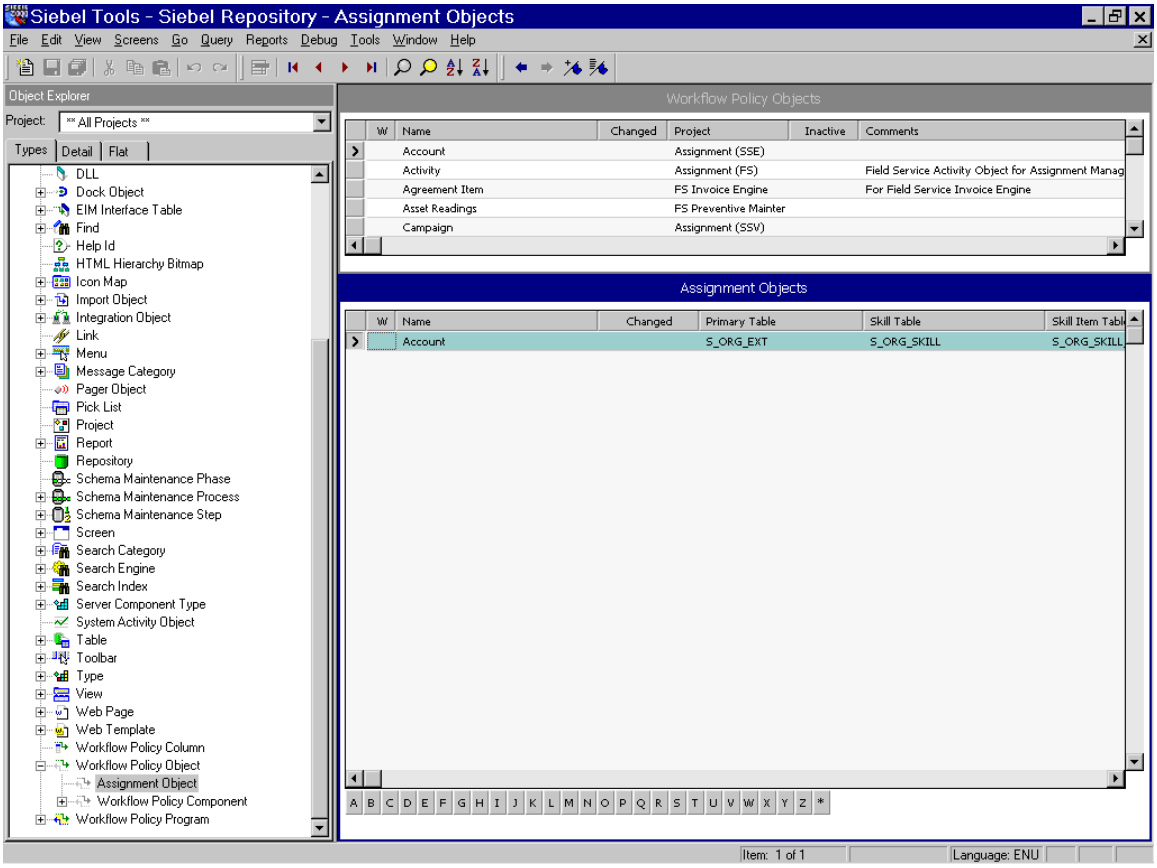


Figure 7. Example of Configuring an Assignment Object

Configuring Assignment Objects for Interactive Assignment

Interactive assignment allows users to invoke Territory Assignment Manager immediately, view the list of assignees generated by Territory 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 8 shows the Assign option from the Menu button from the All Service Requests view.

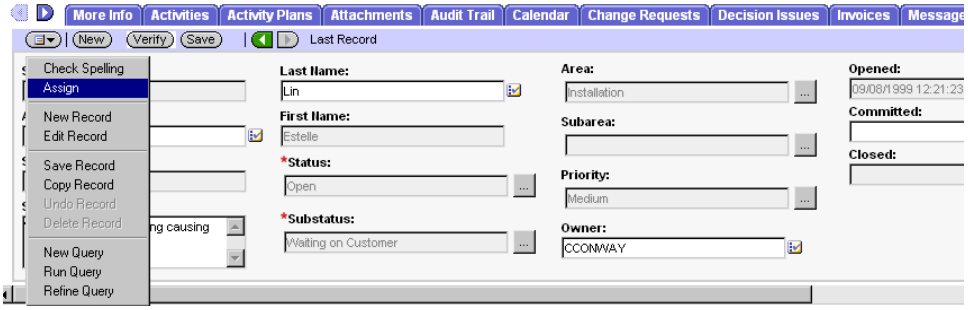


Figure 8. Example of Interactive Assignment

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 Territory 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 21.

To configure interactive assignment for an assignment object

1. Verify that Territory 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
      - Both if you are setting up employee-, position-, and organization-based assignments

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 94 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 8 on page 93 and *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Configuring Assignment Objects for Multitiered Assignment

Configuring assignment objects for multitiered assignment allows Territory Assignment Manager to consider the relationship between people and organizations when determining the proper assignment. By default, Territory 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 20 and "Using Multitiered Assignment with Sales Assignment Rules" on page 35.

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 9 on page 62.

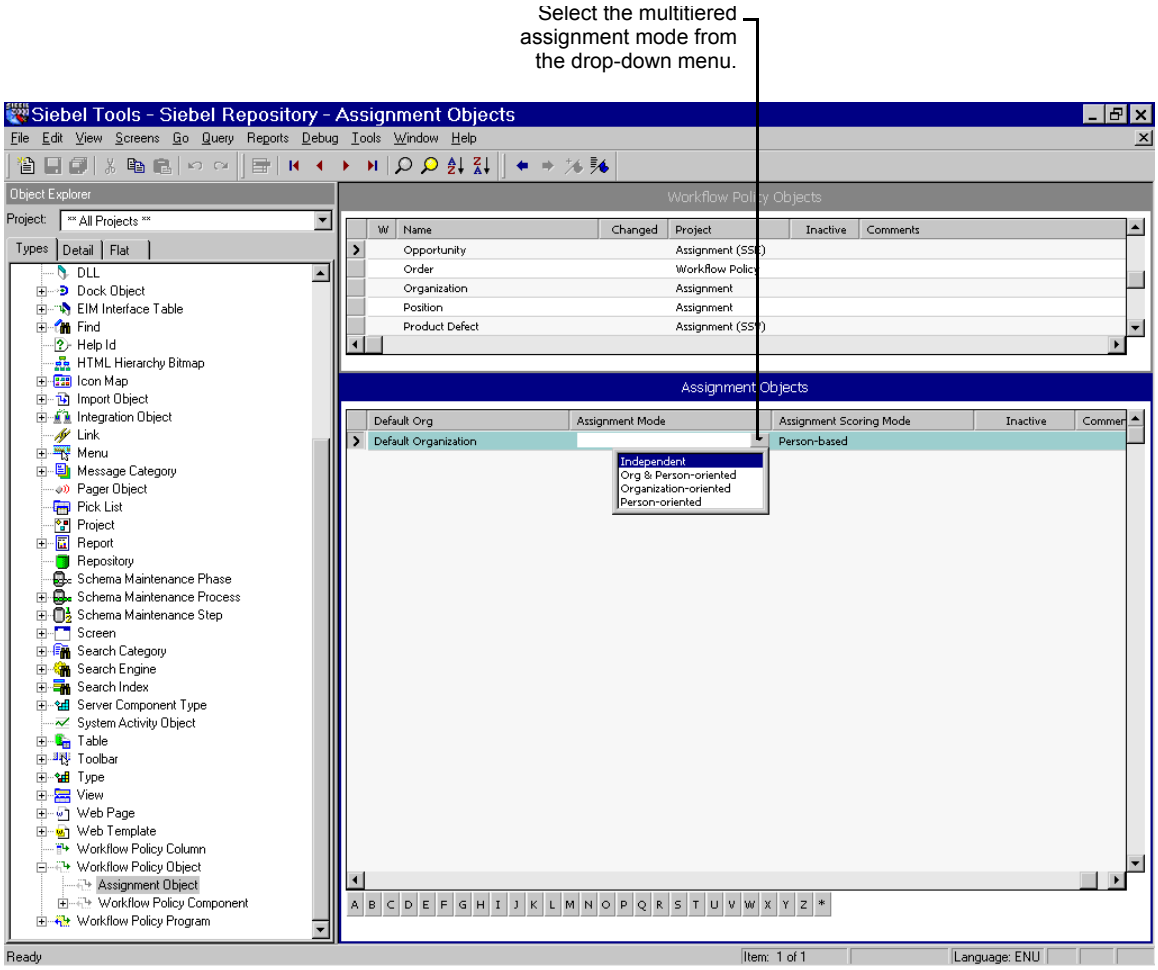


Figure 9. Selecting the Multitiered Mode

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 are column-based. Column-based attributes are stored as columns in the object (such as Opportunity).

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 Territory Detail 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 (Territories > Territory Detail > 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 82.
3. Recompile all projects (not just the locked projects) in the .srf file.

   For instructions, see Step 1 on page 94 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 of an assignment criterion when you are entering an attribute in a value record, as shown in Figure 10.

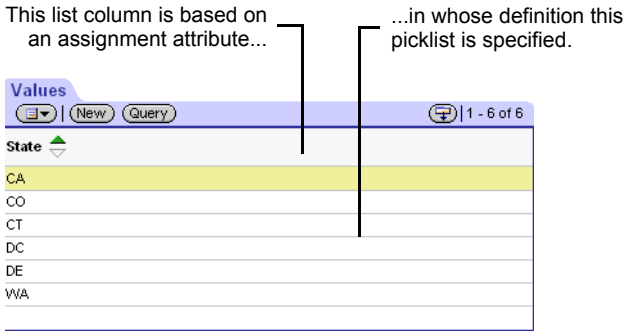


Figure 10. Picklist for Populating an Attribute in a Value Record

An assignment criteria attribute object definition implements each list column in the Values applet, as described in "Configuring Assignment Criteria Attributes" on page 77. 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 6 on page 48.

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 71.

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 4 on page 69.
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 93.

Figure 11 shows an example of creating an assignment attribute called Example of data type Varchar. This attribute also has the optional Assignment Attribute Picklist selected.

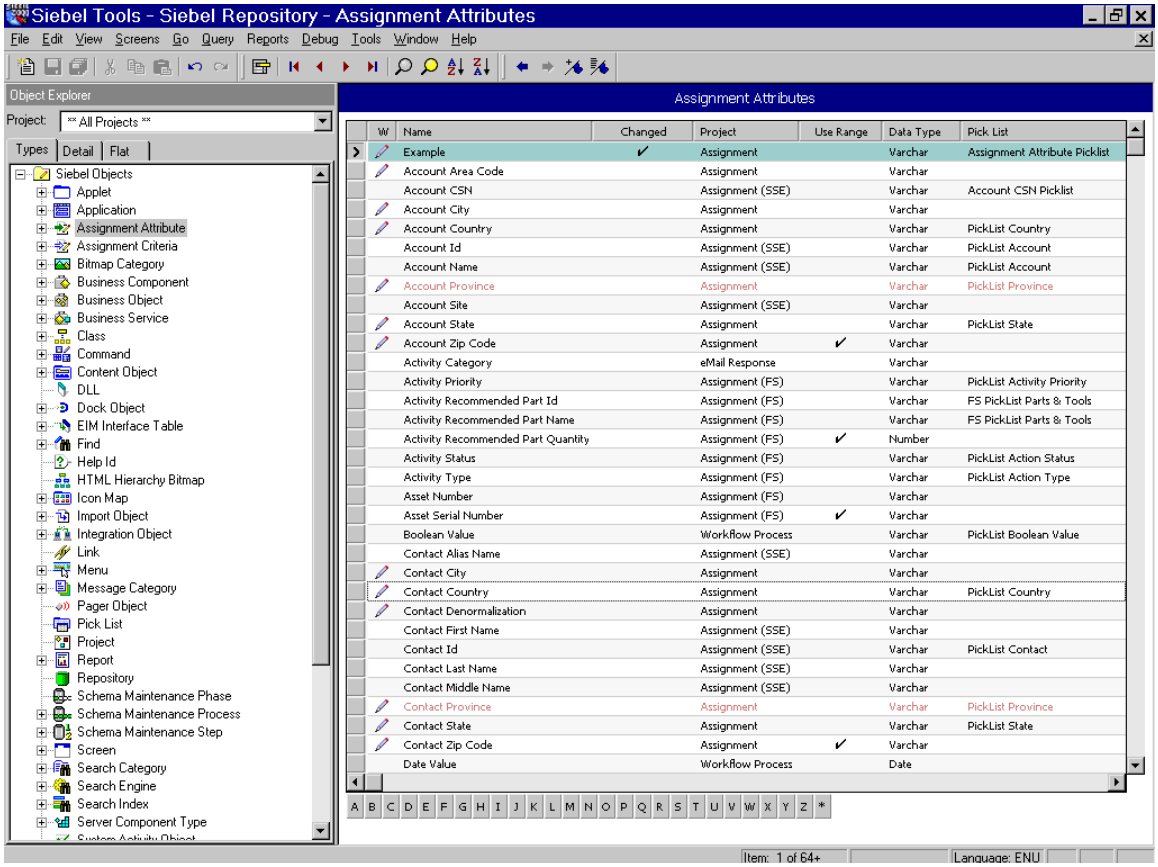


Figure 11. Example of Creating an Assignment Attribute

Table 4 shows some of the properties of the Assignment Attribute object type.

Table 4. 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 Territory Detail 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.

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, MidMarket Edition*. 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 criteria values. For more information, see *Siebel Tools Reference, MidMarket Edition*.

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 6 on page 48. 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 5 on page 73.

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 93.

Figure 12 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.

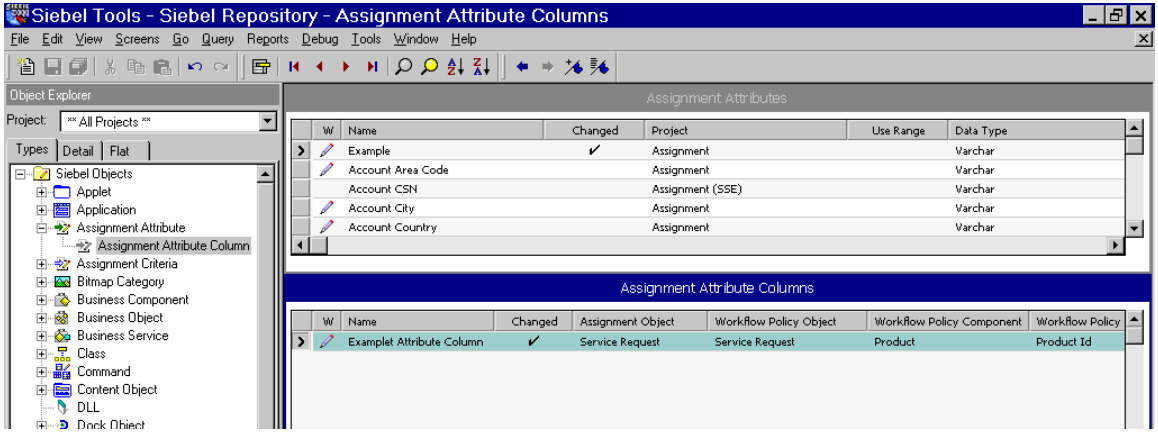


Figure 12. Mapping an Assignment Attribute to an Assignment Object

Table 5 shows some of the properties of the Assignment Attribute Column object type.

Table 5. 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, Territory 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 77.

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 do not want the assignment criteria to appear in the Criteria picklist, uncheck the Display Flag field.

   For descriptions of these properties, see Table 6 on page 76.
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 93.

Figure 13 shows an example of creating an assignment criteria called Example Criteria.

NOTE: The Use Expertise and Employee Skill properties are not used in the Siebel MidMarket product.

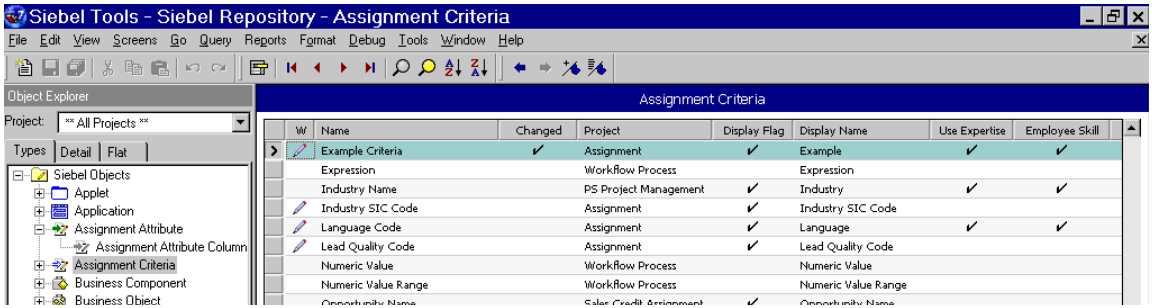


Figure 13. Creating an Assignment Criteria

The assignment criteria object definition has two properties to specify its name (internally and as displayed). Most of the behavior of an assignment criteria is configured in the assignment criteria attribute children. Table 6 shows some of the properties of the assignment criteria object type.

Table 6. 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 (Territory Detail > Criteria). If not specified, the value in the Name property is used instead.
Employee Skill	Optional	Not used in the Siebel MidMarket product.
Name	Required	Name of the assignment criteria.
Use Expertise	Optional	Not used in the Siebel MidMarket product.

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 14.

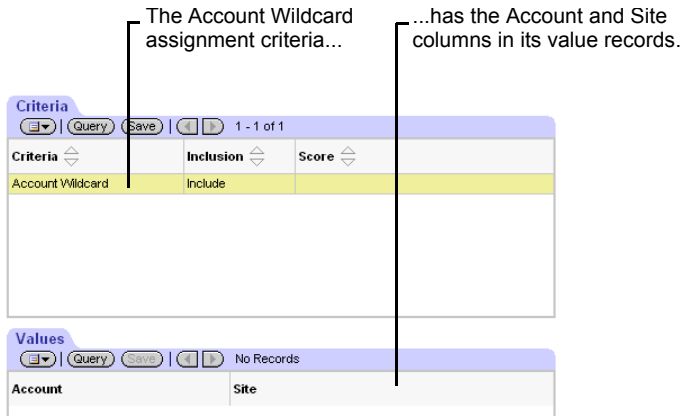


Figure 14. List Columns in the Values List

One list column appears in the Values list for each assignment criteria attribute in the assignment criteria. In Figure 14 on page 77, 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 15 shows how this is accomplished in Siebel Tools.

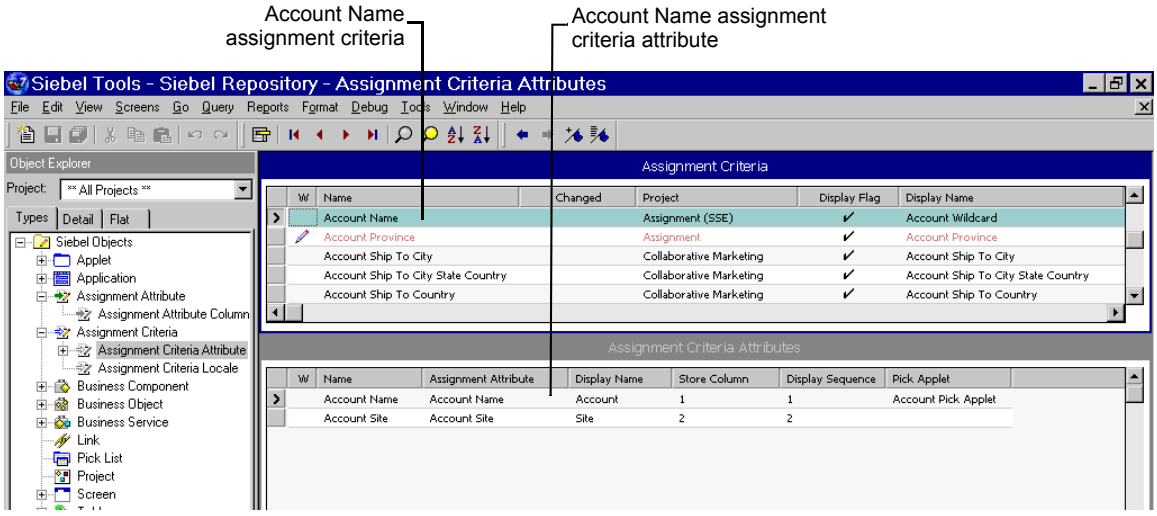


Figure 15. Assignment Criteria and Child Assignment Criteria Attribute

If there were more assignment criteria attributes for this assignment criteria, each would have a list column in the Values list.

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 65.

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 7 on page 81.

7 Update the siebel.srf file.

For instructions on updating the siebel.srf file, see Step 1 on page 94 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" on page 94 procedure.

Figure 16 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.

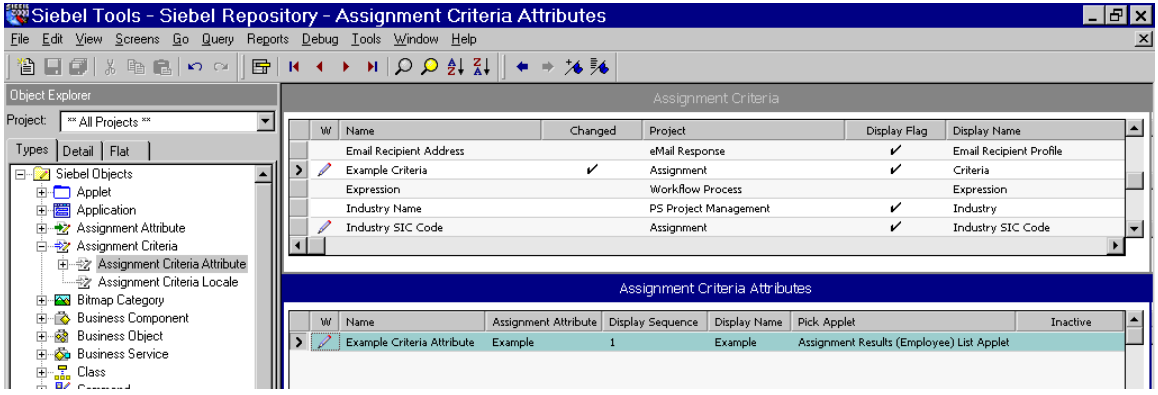


Figure 16. Creating an Assignment Criteria Attribute

Table 7 shows some of the properties of the assignment criteria attribute object type.

Table 7. 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 93.

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 Territory 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.

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 85.

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 88.

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 90.

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 158.

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

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

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 17 shows an example of creating the Opportunity workflow policy component that maps to the Opportunity source table and the Account target table.

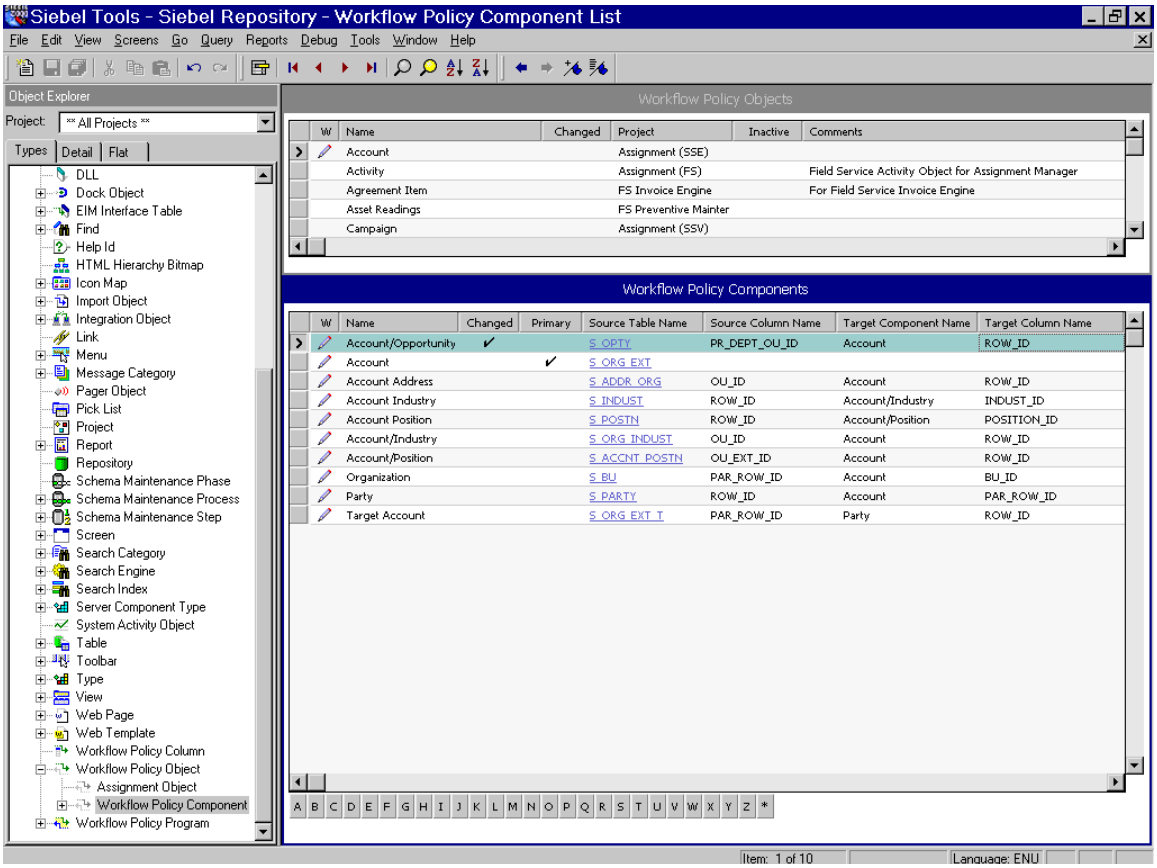


Figure 17. A Workflow Policy Component That Maps to Two Objects

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 18 shows an example of mapping the Account/Opportunity workflow policy component to the Opportunity Lead Quality assignment criteria.

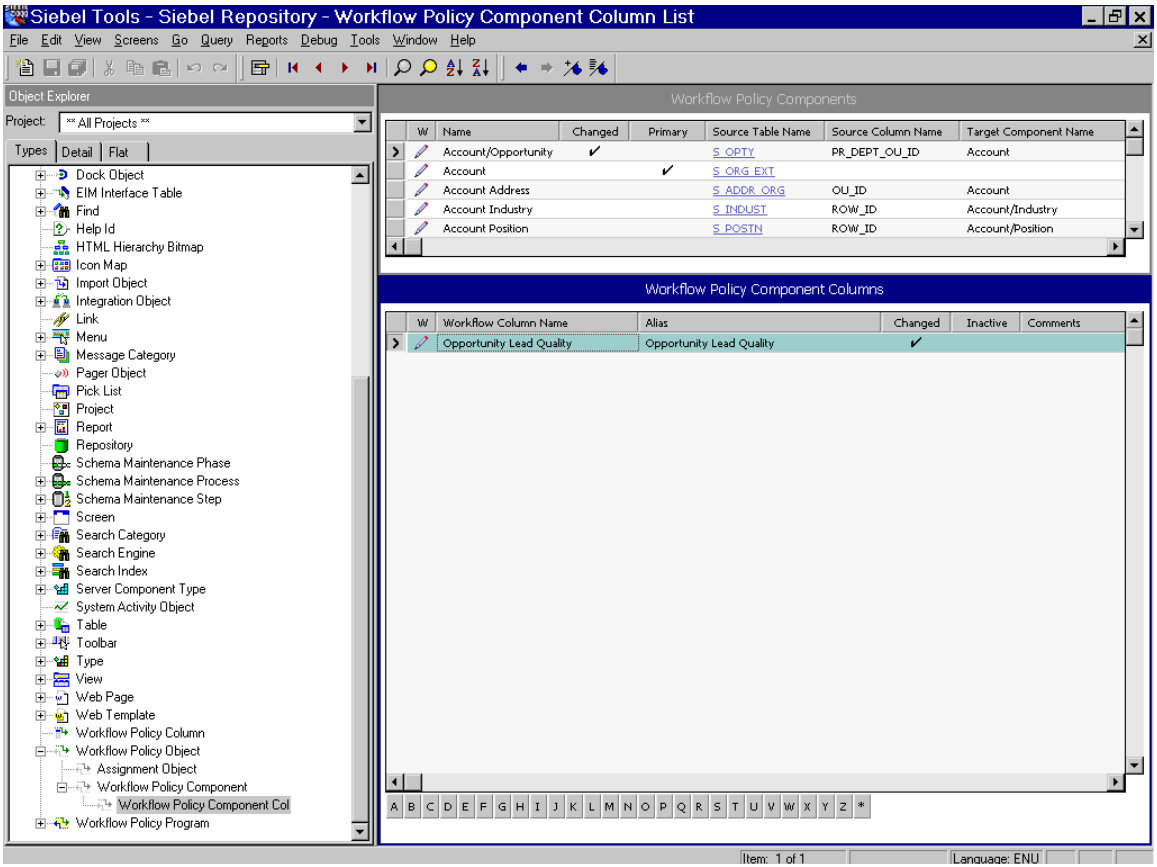


Figure 18. Mapping Workflow Policy Components to Assignment Criteria

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 93.

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 8 on page 93.

Figure 19 shows an example of mapping the Account/Opportunity workflow policy component to the Opportunity: Lead Quality assignment attribute.

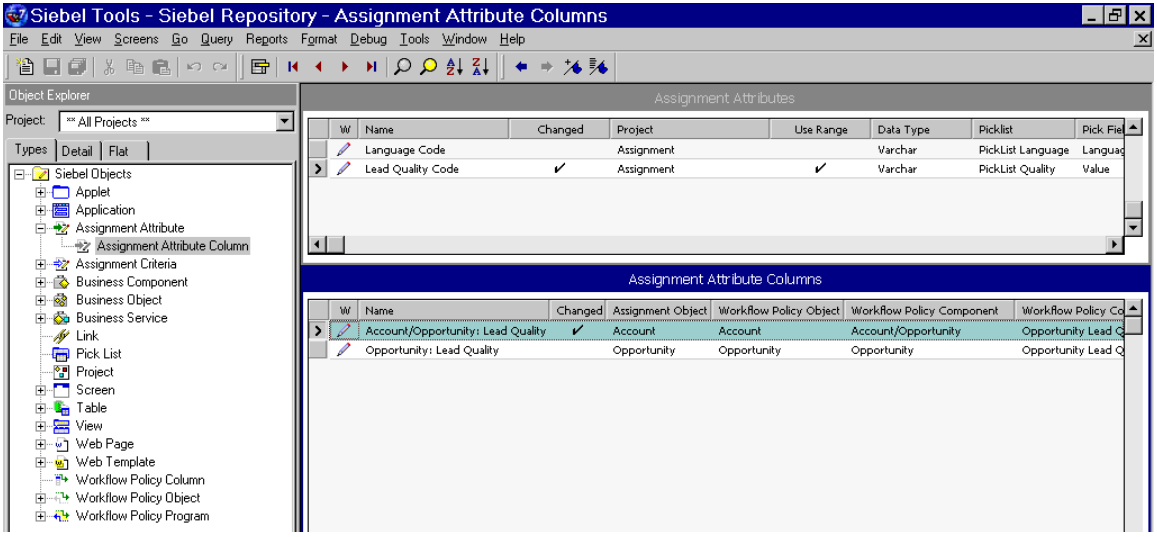


Figure 19. Mapping Workflow Policy Components to Assignment Attributes

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 all steps in "To update your deployment with new configurations" on page 94.

Workflow Policy Components Inactivated by Default

The Opportunity Workflow Policy Object has the following Workflow Policy Components inactivated by default for Territory Assignment Manager.

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, MidMarket Edition*.

Server Administration After Configuration

After configuring Territory Assignment Manager objects and attributes, it is often necessary to recompile the .srf file and restart various server components and tasks. Table 8 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 8. 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 8 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 8 on page 93 and *Siebel Tools Reference, MidMarket Edition*. For information on distributing the siebel.srf file, see *Siebel Anywhere Administration Guide, MidMarket Edition*.

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.

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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 Territory Assignment List view.

For more information on releasing assignment rules, see "Releasing Assignment Rules" on page 114.

d Restart the Workflow Monitor Agent server component.

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

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, MidMarket Edition*.

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.

Territory Assignment Rules 4

This chapter provides a procedure for activating territory assignment rules and explains how to define and use territory 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

Territory 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 form, query for the assignment rule you want to activate, and click Go.
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 territory assignment rules, you need to perform the following tasks in the Siebel client:

- Create the territory assignment rule.

  For more information, see "Creating Territory Assignment Rules" on page 100.

- Create assignment criteria.

  For more information, see "Creating Assignment Criteria" on page 104.

- Create criteria values.

  For more information, see "Creating Criteria Values" on page 106.

- Assign employees, positions, or organizations to the assignment rule.

  For more information, see "Assigning Employees, Positions, and Organizations" on page 108.

- Release the assignment rule.

  For more information, see "Releasing Assignment Rules" on page 114.

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 Territory Assignment Rules

This section explains how to create territory assignment rules. For more information on assignment rules, see "Assignment Rules" on page 17.

First, you use the Territory Detail view to create a new assignment rule specifying criteria and positions. Then, if you want Territory Assignment Manager to evaluate employees or organizations as candidates or if you want to set primaries for that rule, you use the Assignment Rule view to specify those values. The procedures you need to accomplish this are divided into two phases as follows:

- "Phase 1: To create territory assignment rules"
- "Phase 2: To specify additional territory assignment rule values" on page 102

Phase 1: To create territory assignment rules

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

Table 9 shows the predefined fields.

Table 9. Territory Assignment Rule Fields

Field	Description	Example
Activation (Date/ Time)	Start date of the territory assignment rule.	
Comments	Type in your comments here.	
Exclusive	If selected, a territory assignment rule assigns a priority status to candidates from that rule. These candidates supersede other qualified candidates from nonexclusive territory assignment rules. The object is assigned to: ■ The default employee for employee-based assignments ■ The default position for position-based assignments ■ The default organization for organization-based assignments	
Expiration (Date/ Time)	End date of the territory assignment rule.	
Last Updated By	Person who last updated the record.	
Name	Name of the territory assignment rule.	North West Region
(Assignment) Objects	Objects applied to this rule. If no objects are specified, then all objects are applied to this rule.	Account
Primary Position	Primary position for this territory assignment rule. Typically used for sales-related assignments. Applicable only if this position is included for the assignment rule.	
Score	Not used in the Siebel MidMarket product.	
Updated Date	Date of last record update.	6/12/2002 04:42:18 PM

Figure 20 shows an example of creating a Territory Assignment Rule.

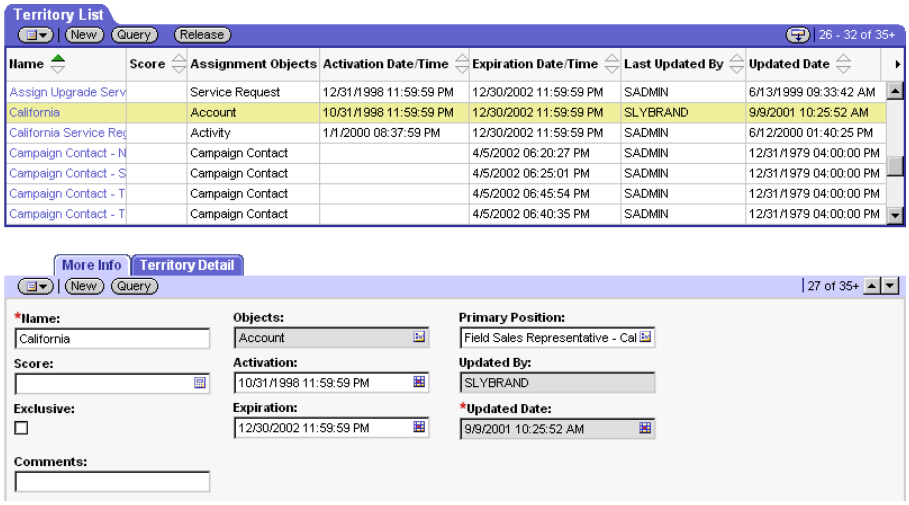

Figure 20. Example of Creating a Territory Assignment Rule

Phase 2: To specify additional territory assignment rule values

1. With the new rule still selected in the Territories view, click the Show drop-down list arrow and select Assignment Rules.
2. In the Assignment Rule form, click in the available fields to enter or change relevant information for the rule.

Table 10 shows some of the fields.

Table 10. Additional Territory Assignment Rule Fields

Field	Description	Example
All Organizations	If selected, evaluates all organizations in the Siebel database as candidates for this assignment rule.	
All People	If selected, evaluates all employees or positions in the Siebel database as candidates for this assignment rule.	
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.	
Primary Organization	Primary organization for this assignment rule. Applicable only if this organization is included for the assignment rule.	

NOTE: The Score, Minimum Score, Rule Group, Sequence, and Check Calendar fields are not used in the Siebel MidMarket product. Also, only the All, Above Minimum value in the Assignees from Rule field is used in the Siebel MidMarket product.

For more information about assigning employees, positions, and organizations, see "Assigning Employees, Positions, and Organizations" on page 108.

Creating Assignment Criteria

This section explains how to create assignment criteria for territory assignment rules. For more information on assignment criteria, see "Assignment Criteria" on page 18.

NOTE: Assignment rules can be created with no criteria. A rule of this nature functions to make sure all data items of a particular 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. Although assignment criteria are not required for an assignment rule, assignment rules with no criteria and no assignment object specified are ignored by Territory Assignment Manager.

To create assignment criteria

1. From the application-level menu, choose View > Site Map > Assignment Administration > Territories.
2. In the Territory list, select the assignment rule for which you want to create assignment criteria, and then click the Territory Detail 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 11 shows some of the fields.

Table 11. Assignment Criteria Fields

Field	Description	Example
Criteria	Type of assignment criteria.	Account State
Inclusion	Methods used by Territory Assignment Manager to determine how criteria values and candidates are matched. For more information on inclusion methods, see Table 3 on page 18.	Include

Figure 21 shows a criterion called Account State in the Criteria list.

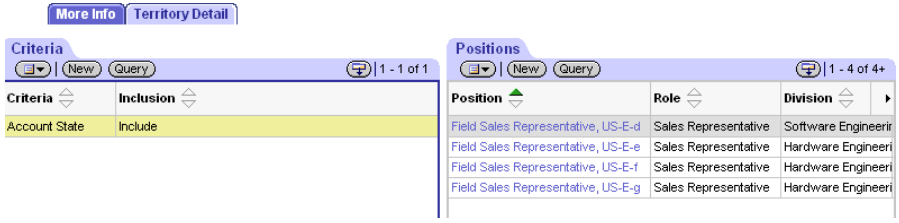

Figure 21. Example of Creating Territory Assignment Criteria

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 19.

To create criteria values

1. With the appropriate assignment criterion selected in the Criteria list (View > Site Map > Assignment Administration > Territories > Territory Detail > Criteria), click 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.

NOTE: It is possible to create duplicate criteria values for an 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 22 shows an example of creating criteria values for an Account State criterion.

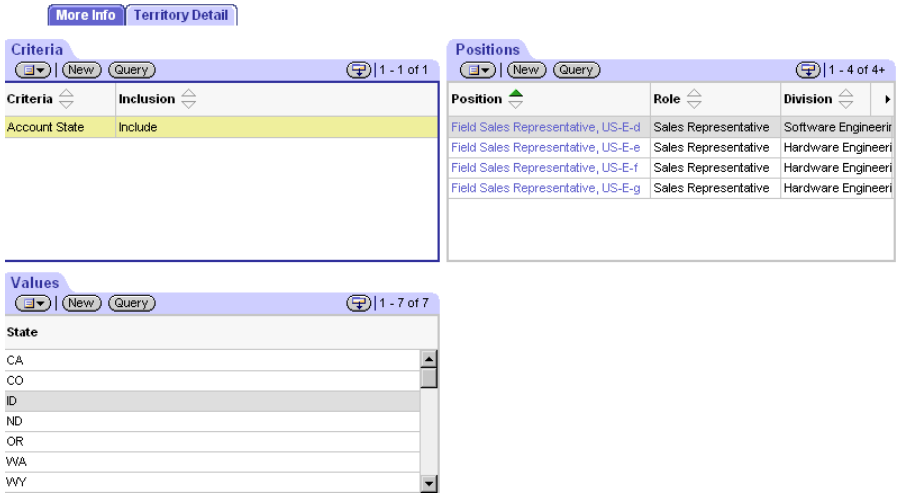

Figure 22. Example of Creating Criteria Values

Assigning Employees, Positions, and Organizations

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

- "Assigning Employees"
- "Assigning Positions" on page 110
- "Assigning Organizations" on page 112

For more information about employees, positions, and organizations, see "Candidates" on page 14.

Assigning Employees

This section explains how to assign employees for a territory assignment rule. Service organizations typically assign employees to objects. For more information on employees, see "Employees" on page 14.

NOTE: Territory 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 assign employees

1. With the appropriate territory assignment rule selected in the Assignment Rule view (View > Site Map > Assignment Administration > Assignment Rule), 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 12 shows select predefined fields available.

Table 12. Employees List Fields

Field	Description	Example
Activation Date/Time	Start date of the territory assignment rule employee.	4/10/01 3:01:00 PM
Expiration Date/Time	End date of the territory assignment rule employee.	4/10/01 3:01:00 PM
Score	Not used in the Siebel MidMarket product.	

Employees assigned 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 assigned. For more information about the rulecache.dat file, see "Releasing Assignment Rules" on page 114.

Figure 23 shows an example of assigning employees.

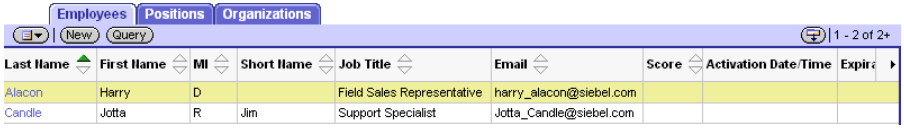

Figure 23. Example of Assigning Employees

Assigning Positions

This section explains how to assign positions for a territory assignment rule. Sales organizations typically assign positions to objects. For more information on positions, see "Positions" on page 14.

NOTE: Territory 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 assign positions

1. With the appropriate territory 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 13 shows select predefined fields available for editing.

Table 13. Positions List Fields

Field	Description	Example
Activation Date/Time	Start date of the territory assignment rule position.	4/10/01 3:01:00 PM
Expiration Date/Time	End date of the territory assignment rule position.	4/10/01 3:01:00 PM
Score	Not used in the Siebel MidMarket product.	

Figure 24 shows a list of sales representative positions in the Positions list available for a territory assignment rule.

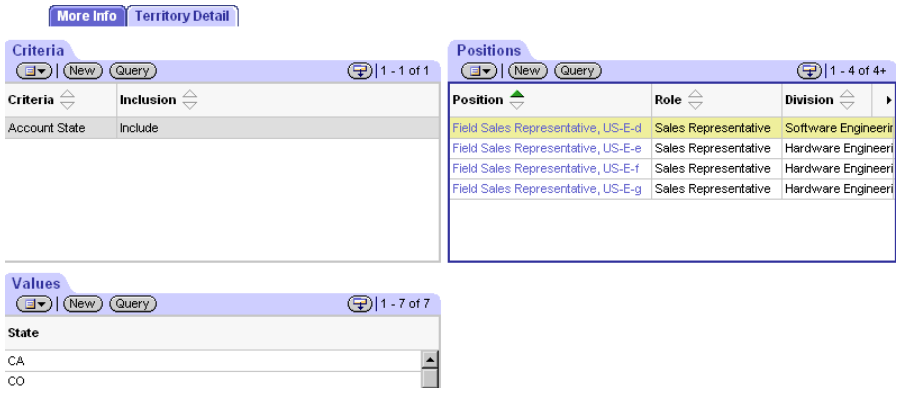

Figure 24. Example of Assigning Positions

After you assign positions for an assignment rule, only the active employees for each position are available. If Territory 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 167.

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 assigned. For further information, see "Releasing Assignment Rules" on page 114.

NOTE: Do not delete positions. If you delete a position that was manually assigned as the primary position for an object, Territory Assignment Manager is not able to set the primary position for that object. Instead, deactivate a position by setting the expiration date for that position. For more information, see *Applications Administration Guide, MidMarket Edition*.

Territory 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 20.

Assigning Organizations

This section explains how to assign organizations for a territory assignment rule. For more information on organizations, see "Organizations" on page 15.

To assign organizations

1. With the appropriate territory 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 14 shows select predefined fields available for editing.

Table 14. Organizations List Fields

Field	Description	Example
Activation Date/Time	Start date of the territory assignment rule organization.	4/10/01 3:01:00 PM
Expiration Date/Time	End date of the territory assignment rule organization.	4/10/01 3:01:00 PM
Score	Not used in the Siebel MidMarket product.	

Figure 25 shows an example of assigning an organization for an assignment rule.

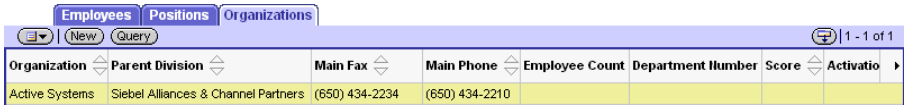

Figure 25. Example of Assigning Organizations

Organizations assigned 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 assigned. For further information, see "Releasing Assignment Rules" on page 114.

Territory 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 20.

Alternatively, you can set a default organization for assignment objects. For example, if you want all 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, MidMarket Edition*.

Releasing Assignment Rules

After you have created and defined assignment rules, you must release them to instruct Territory 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 > Territories.
2. In the Territory List list, click Release.

When a new Siebel Server is installed—for instance, as part of an upgrade—all 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 all servers in the deployment recreate the same rule cache.

Running Territory Assignment Manager 5

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

- Interactive (see "Running Territory Assignment Manager in Interactive Mode" on page 126)
- Dynamic (see "Running Territory Assignment Manager in Dynamic Mode" on page 131)
- Mobile (see "Running Territory Assignment Manager in Mobile Mode" on page 145)
- Batch (see "Running Territory Assignment Manager in Batch Mode" on page 146)

NOTE: Territory Assignment Manager uses many Siebel Server resources. It is recommended you monitor the Siebel Servers whenever Territory Assignment Manager is invoked, especially if you run multiple instances at the same time. For more information about running multiple instances of Territory Assignment Manager, see "Running Multiple Instances of Territory Assignment Manager in Batch Mode" on page 156.

Before running Territory Assignment Manager, you must already have created your assignment rules. For information on creating assignment rules, see Chapter 4, "Territory Assignment Rules." You also need to perform several preparation tasks. For more information, see the next section, "Preparing to Run Territory Assignment Manager" on page 116.

Territory 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.
- The run-time parameters of assignment objects and their properties and the list of values for the picklists from the database.

Make sure the rulecache.dat file is updated (see "Releasing Assignment Rules" on page 114 for this procedure) and the .srf file is compiled with the latest configurations (see "Server Administration After Configuration" on page 93 or *Siebel Tools Reference, MidMarket Edition* for information on this procedure) before running Territory Assignment Manager.

Preparing to Run Territory Assignment Manager

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

- "Checking the Assignment Manager and Server Request Broker Components" on page 117
- "Configuring the Assignment Manager Component" on page 118
- "Configuring Territory Assignment Manager Event Logs" on page 121

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

- "Server Administration Requirements for Assignment Modes" on page 124
- "Server Administration Requirements After Configuration" on page 125

Checking the Assignment Manager and Server Request Broker Components

Before running Territory 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 Territory Assignment Manager, you should configure the Assignment Manager component to enhance its performance for your implementation by adjusting the appropriate parameters. Table 15 on page 119 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, MidMarket Edition*.

Table 15 shows the parameters used by Territory Assignment Manager that you can change. For a list of predefined server components and generic parameters, see *Siebel Server Administration Guide, MidMarket Edition*.

Table 15. 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 Territory 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, Territory 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 Territory 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 Territory Assignment Manager have large resource requirements.

- **Maximum Tasks.** This parameter controls the maximum number of server threads that can run at any time. For Territory 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, Territory Assignment Manager is disabled. It is recommend to use the default value of one, as server processes and Territory Assignment Manager have large resource requirements.

Configuring Territory Assignment Manager Event Logs

Before running Territory 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, MidMarket Edition*.

NOTE: The Trace Flags and Error Flags parameters are no longer used with Territory 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, Territory 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, Territory 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 Territory 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 26 shows an example of setting the log level of event types for the Assignment Manager server component.

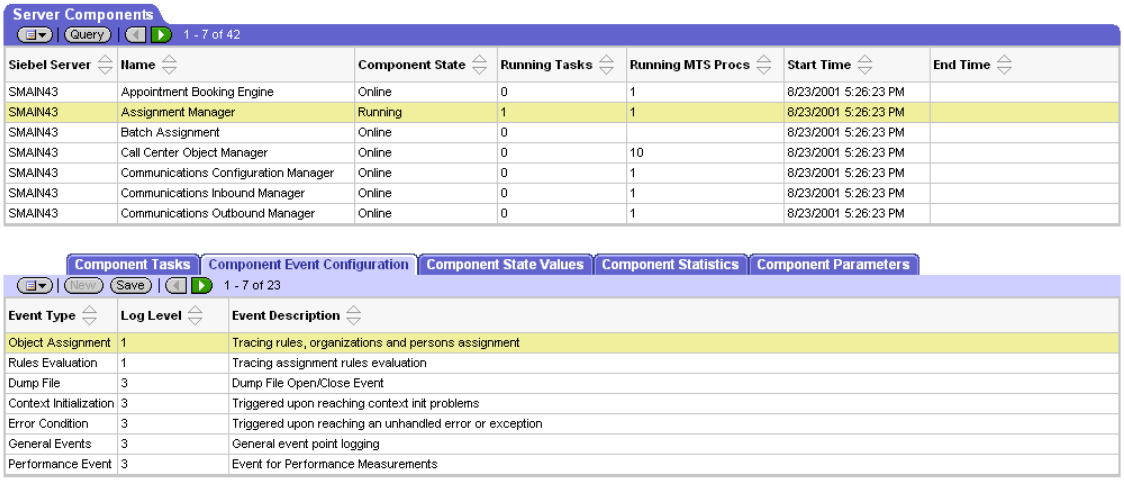

Figure 26. Configuring Event Logs for Territory Assignment Manager

For more information on configuring event logs, see *Siebel Server Administration Guide, MidMarket Edition*.

Server Administration Requirements for Assignment Modes

Territory Assignment Manager requires various functioning server components and tasks based on the selected assignment mode. Table 16 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 16. 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 Territory Assignment Manager objects and attributes or altering assignment policies, it is often necessary to stop and restart various server tasks and components. Table 17 summarizes the required server tasks and components that must be restarted based on the type of configuration process. For further information on Territory Assignment Manager configuration, see Chapter 3, "Territory 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 17. 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 Territory Assignment Manager in Interactive Mode

This section explains how to run Territory 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 simply clicking the Menu button and choosing Assign. For more information on Interactive Assignment, see "Interactive Assignment" on page 21. You can also configure other assignment objects to use Interactive Assignment. For more information on configuring assignment objects, see "Configuring Assignment Objects" on page 53.

Before you use Interactive Assignment, you must first make sure that specific parameters exist in your Siebel client configuration (.cfg) file. These parameters specify the location of the Siebel Server where the Siebel Territory Assignment Manager is running, and are automatically created during installation of the Siebel client.

Table 18 shows the configuration file parameters used to configure the Siebel client for Interactive Assignment.

Table 18. Parameters for Interactive Assignment Configuration

Parameter Name	Description
GatewayAddress	Address of the Siebel Name Server for the Siebel Server[1]
EnterpriseServer	Enterprise name of the Siebel Server
RequestComponent	Name of the server component that services interactive assignment requests
RequestServer	Name of the Siebel Server

1. GatewayAddress and GatewayConnString are the same parameters and can be used interchangeably in the configuration file. The default configuration file uses the GatewayAddress parameter.

The following example shows how to use these parameters:

```
GatewayAddress = <name of siebel gateway machine>
EnterpriseServer = <name of enterprise>
RequestComponent = SRMSynch
RequestServer = <name of siebel server machine>
```

NOTE: If Resonate is in use with your deployment, you do not need the RequestServer parameter as Resonate determines which Siebel Server to contact based on load balancing metrics.

For more information about the Siebel client installation process and configuration file, see *Siebel Web Client Administration Guide, MidMarket Edition* and the Siebel server installation guide for the operating system you are using.

After the configuration parameters are set, Interactive Assignment requires the following server components to be:

- Online
  - Assignment Manager
- Running
  - Server Request Broker

To run Interactive Assignment for service requests

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 Territory Assignment Manager.

The Siebel client:

- Communicates with the Siebel Territory Assignment Manager on the Siebel Server and creates a list of qualified employees for the service request.
- Sets the service request owner to the employee that you choose.

Running Interactive Assignment Using the Command-Line SRVRMGR Utility

Alternatively, Interactive Assignment can be run from the command-line interface using the AsgnSrvr command and the parameters in Table 19. The command-line interface of the Server Manager is the srvrmgr program. For full information on using the command-line interface, see *Siebel Server Administration Guide, MidMarket Edition*.

Table 19. 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 152.	FALSE
AsgnKey	Assignment Key	Rule set used for key-based routing Note: Not used in the Siebel MidMarket product.	
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 19. Interactive Assignment Command-Line Interface Parameters

Parameter Name	Display Name	Description	Default Value
ObjWhereClause	Object Where Clause	WHERE clause of the object for Interactive Assignment For more information, see "ObjWhereClause" on page 152.	
UseForUpdate	Use FOR UPDATE	Use FOR UPDATE to lock primary table row	TRUE

Running Territory 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 Territory Assignment Manager in dynamic mode. The processes described are:

- "Generating Triggers" on page 133
- "Running Workflow Monitor Agents" on page 136
- "Activating Assignment Policies" on page 139
- "Territory Assignment Manager Performance in Dynamic Mode" on page 144

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.

You must run Generate Triggers to create triggers that monitor changes in the database.

NOTE: To regenerate triggers, you need to run Generate Triggers once 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 Territory 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, MidMarket Edition*.

2. Disable the inappropriate columns by inactivating the assignment attribute column.

   For detailed information, see "Disabling an Assignment Attribute" on page 82.

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 Territory 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, MidMarket Edition*.

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, MidMarket Edition*.

6 In the My Component Requests form, click the Menu button, and then click Submit request.

Alternatively, this task can be run using the GenTrig command-line interface command. See *Siebel Server Administration Guide, MidMarket Edition* for detailed information on this procedure. Table 20 shows the available parameters used with GenTrig at the command-line interface.

Table 20. 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 Territory Assignment Manager policies. Affected objects are then dynamically assigned. For more information about Workflow Monitor Agent, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

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, MidMarket Edition*. 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 21 on page 138.

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 Server Administration Guide, MidMarket Edition*.

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, MidMarket Edition*. For further information about the Workflow Monitor Agent, see *Siebel Business Process Designer Administration Guide, MidMarket Edition.*

NOTE: It is possible to set up multiple Workflow Monitor Agents for Dynamic Assignment. For more information, see the "Monitoring and Performance Tuning" section of *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Table 21 shows the Workflow Monitor Agent command-line interface parameters.

Table 21. 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, MidMarket Edition*.

Also, you should not associate customized workflow actions with assignment policies. For more information about workflow actions, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

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 140
- "To activate an assignment policy" on page 140
- "To deactivate an assignment policy" on page 141
- "To create an action for an assignment policy" on page 141

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 27 shows an example of successfully setting Assignment Group to the Account object assignment policy.

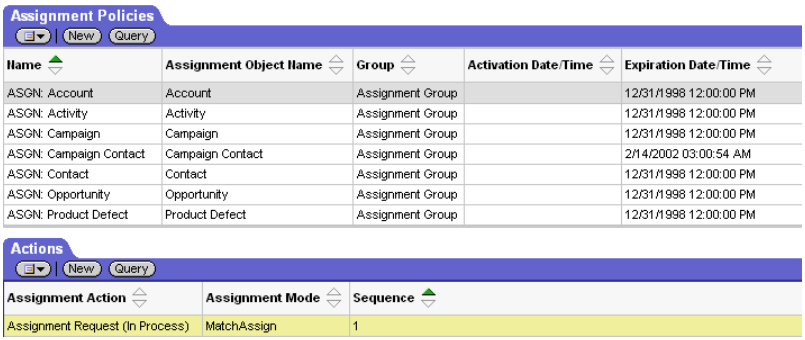

Figure 27. Example of Setting a Workflow Group for an Assignment Policy

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 28 on page 142 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 28 shows an example of successfully creating an action for the Account object assignment policy.

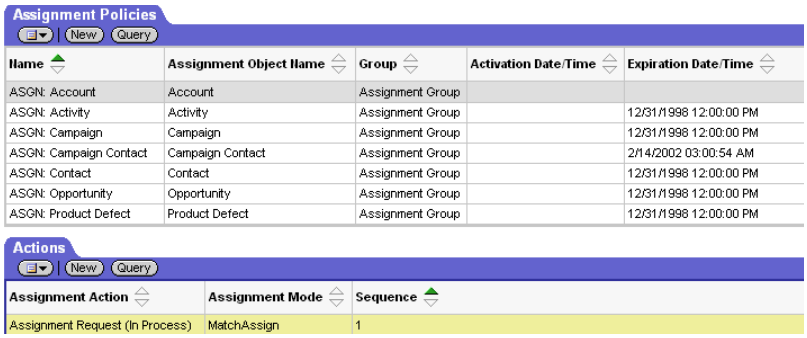

Figure 28. Example of Creating an Action for an Assignment Policy

Activating Contact Denormalization

Perform the following procedure to activate contact denormalization. The policy is inactivated by default.

NOTE: When Territory 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 Territory 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 29 shows an example of successfully enabling Contact Denormalization for Dynamic Assignment.

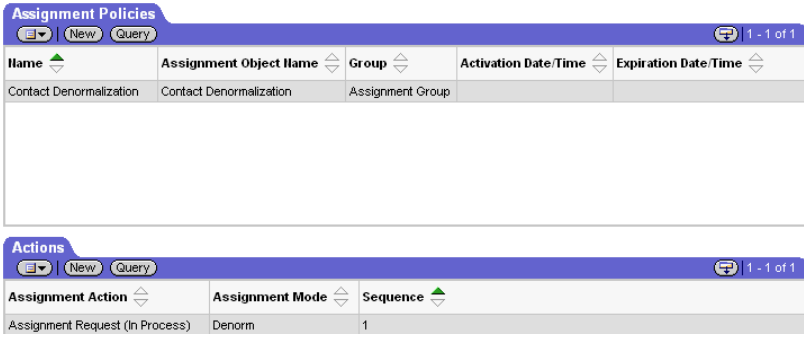

Figure 29. Enabling Contact Denormalization for Dynamic Assignment

Territory Assignment Manager Performance in Dynamic Mode

If users experience slow response time while running Territory 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 Territory Assignment Manager in Mobile Mode

This section includes procedures to run Territory Assignment Manager in mobile mode. Use Mobile Assignment to reassign people based on changes uploaded by mobile clients. Territory 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 Territory Assignment Manager to dynamically reassign affected objects. For more information, see "Mobile Assignment" on page 23.

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 133.

2. Start the Workflow Monitor Agent.

   For instructions, see "Running Workflow Monitor Agents" on page 136.

3. Start the Server Request Broker server component (if running Interactive Assignment).

   For instructions, see *Siebel Server Administration Guide, MidMarket Edition*.

Running Territory Assignment Manager in Batch Mode

This section explains how to run Territory Assignment Manager in batch mode. Use Batch Assignment to assign an assignment object in a single batch. You *must* run Territory 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
  - Change activation and expiration dates
  - Change exclusive mode
- Modify the list of employees, positions, or organizations (or all) 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 the Territory Assignment Manager configuration in Siebel Tools and you want your changes to affect existing objects. You change the Territory 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 Territory Assignment Manager fails.

- Feel that existing assignments may not be accurate. Territory 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 141 and "To run Generate Triggers" on page 133. 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 23. For more information, see "To activate an assignment policy" on page 140.

NOTE: For performance reasons, do not run Batch Assignment while running Dynamic Assignment.

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. 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 Territory 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 Territory Assignment Manager processes to make sure that sufficient rollback space is available.

For more information about using the Object WHERE clause, see Table 22 on page 151 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 the following values:

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 for all rows in the batch, but not just those reassigned or those rows that had a net change in their assignment. Conflicts can occur with other workflow policies that access these fields.

Running Batch Assignment Using the Command-Line SRVRMGR Utility

Alternatively, Batch Assignment can be run from the command-line interface using the AsgnBatch command and the parameters in Table 22. The command-line interface of the Server Manager is the srvrmgr program. For full information on using the command-line interface, see *Siebel Server Administration Guide, MidMarket Edition*.

Table 22. 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 152.	FALSE
AsgnKey	Assignment Key	Used to specify a particular rule group for a batch assignment task. Note: Not used in the Siebel MidMarket product.	
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 152.	
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 22 on page 151.

AllowDupPostn

When this parameter is set to TRUE (set to FALSE by default), Territory 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. Territory Assignment Manager checks whether or not positions with the same Id that pass violate the uniqueness of these key columns. If Territory Assignment Manager detects a violation, only the first position encountered is inserted and the other position is ignored. Otherwise, Territory Assignment Manager inserts both positions in the team table.

If Territory Assignment Manager detects a violation, only the first position encountered is inserted and the other is ignored.

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.

Territory Assignment Manager Performance in Batch Mode

If users experience slow response time while running Territory 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 Territory Assignment Manager in Batch Mode" on page 156.
- 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 Territory Assignment Manager in Batch Mode

When there are many objects that need to be assigned, you can run multiple instances of Territory 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
  ```

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

Territory 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 Territory 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, MidMarket Edition* and *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

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 (that is, a "territory") called Account/Opportunity and add the Account and Opportunity objects to this rule. For more information about creating assignment rules, see "Creating Territory Assignment Rules" on page 100.

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 "Creating Assignment Criteria" on page 104.

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 85.

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 88.

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 90.

Figure 30 shows an example of defining an assignment rule for the Account and Opportunity objects using only the Lead Quality Code assignment criteria.

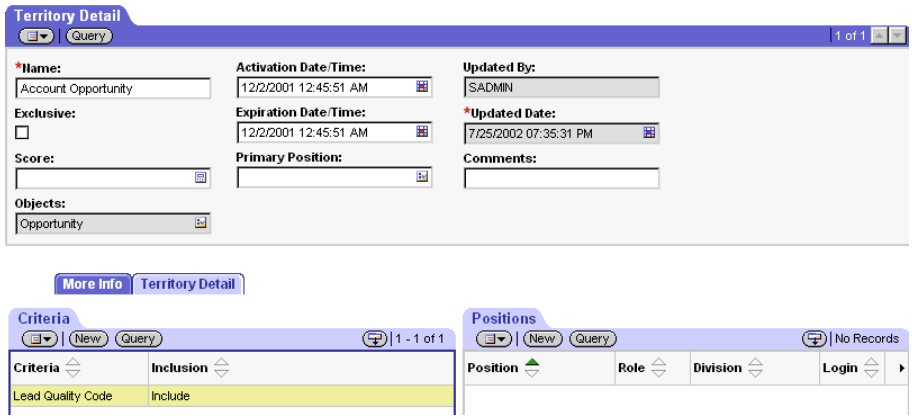

Figure 30. Example of Defining an Assignment Rule for Two Objects Using One Assignment Criteria

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, Territory 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.

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, MidMarket Edition*.
6. Drop and regenerate triggers by running the Generate Triggers server component (if using dynamic assignment or workflow policies).

   See "Generating Triggers" on page 133 for more information on stopping and restarting this server component. Alternatively, see *Siebel Server Administration Guide, MidMarket Edition*.

Assigning Children Accounts Based on Parent's Primary Address

A common business requirement involves the configuration of Territory 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 following properties:

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 following properties:

Name:	State
Alias	Parent Account State

4 In the Object Explorer, select the Assignment Attributes object and create a new record with the following properties:

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 following properties:

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 following properties:

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:	Parent Account State
Assignment Attribute:	Parent Account State
Store Column:	1
Display Sequence:	1
Display Name:	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 93.

For more information on compiling projects, see *Siebel Tools Reference, MidMarket Edition*. For information on distributing the siebel.srf file, see *Siebel Anywhere Administration Guide, MidMarket Edition*.

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, MidMarket Edition* 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

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 Territory List view.

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 (Territory 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, MidMarket Edition* 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

Territory 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 Territory 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 Territory 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, Territory 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 Territory 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 Territory 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, Territory 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" on page 94 procedure.

   NOTE: It is not necessary to recompile the .srf file. However, you should check-in the changes to the server database.

Assignment Object Parameters A

Siebel Territory 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 Territory 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 53.

Assignment Object Parameter Usage

Table 23 shows the usage comments for the assignment 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 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Assignment Mode		Determines whether or not Territory 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. Note: Not used in the Siebel MidMarket product.
Auto Reassign		When this parameter is checked—parameter equals TRUE—Territory 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 23. 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”. Note: Not used in the Siebel MidMarket product.
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. Note: Not used in the Siebel MidMarket product.
Calendar Duration Column		The table column that references the duration of the object. This column is required for availability-based assignment. Note: Not used in the Siebel MidMarket product.
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. Note: Not used in the Siebel MidMarket product.
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 Note: Not used in the Siebel MidMarket product.
Default Employee		Territory Assignment Manager assigns this employee when a conflict or a tie occurs and the appropriate employees cannot be assigned.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Default Organization	Default Org	Territory Assignment Manager assigns this organization when a conflict or a tie occurs and the appropriate organizations cannot be assigned.
Default Position		Territory Assignment Manager assigns this position when a conflict or a tie occurs and the appropriate positions cannot be assigned. 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 Territory 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.
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.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
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. Territory 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. Note: Not used in the Siebel MidMarket product.
Employee Team System Column	Employee System Column	Name of the column in the employee intersection table that specifies whether the employee is system assigned.
Ignore Extra Attributes	Ignore Assignment Attributes	When this parameter is checked, Territory 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, Territory 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.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
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, Territory Assignment Manager never deletes the object creator from the team.
Keep Man Asgn Primary Org		For teams only. When this parameter is checked, Territory Assignment Manager does not set the primary organization if the user explicitly sets the primary organization; Territory 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, Territory Assignment Manager keeps manually assigned assignees and assignment rules.
Keep Manual Primary Employee	Keep Man Asgn Primary Employee	When this parameter is checked, Territory Assignment Manager does not set the primary employee if the user explicitly sets the primary employee; Territory 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.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Keep Manual Primary Position	Keep Man Asgn Primary Position	When this parameter is checked, Territory Assignment Manager does not set the primary position if the user explicitly sets the primary position; Territory 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 182.
Keep Manual Primary Rule	Keep Man Asgn Primary Group	For teams only. When this parameter is checked, Territory Assignment Manager does not set the primary rule if the user explicitly sets the primary rule; Territory 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.
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 Territory 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.
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.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
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.
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. Territory 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.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
Org Team Score Column		Numeric column in assignment object team table that stores the score of the assigned organization. Note: Not used in the Siebel MidMarket product.
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.
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. Territory 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.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
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. Note: Not used in the Siebel MidMarket product.
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.
Replace Team Members	Add Team Members	When this parameter is checked, Territory 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, Territory 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.

Table 23. Usage Comments of Run-Time Parameters

Run-Time Parameter	Properties Name	Usage Comments
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. Territory Assignment Manager copies values from these columns from the old primary rule to the new primary rule.
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, Territory Assignment Manager is enabled for setting a primary employee. You select the primary employee for an assignment rule in the Assignment Rules view.
Set Primary Org		For teams only. When this parameter is set to TRUE, Territory Assignment Manager is enabled for setting a primary organization. You select the primary organization for an assignment rule in the Assignment Rules view.

Table 23. 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, Territory Assignment Manager is enabled for setting a primary position. You select the primary position for an assignment rule in the Assignment Rules view. NOTE: If the property for the assignment object is Set Primary Position = False, then the existing primary is *not* modified by Territory Assignment Manager; the primary remains the same. If the property for the assignment object is Set Primary Position = True, then the existing primary *is* modified by Territory Assignment Manager. This is irrespective of the value present in the Keep Man Asgn Primary Position property.
Set Primary Rule	Set Primary Group	When this parameter is set to TRUE, Territory Assignment Manager is enabled for setting a primary rule. You select the primary rule for an assignment rule in the Assignment Rules view.
Skill Item Table		Name of the skill item table. Note: Not used in the Siebel MidMarket product.
Skill Table		Name of the skill table. Note: Not used in the Siebel MidMarket product.

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 184.

- Account (see Table 24 on page 185)
- Activity (see Table 25 on page 190)
- Campaign (see Table 26 on page 194)
- Campaign Contact (see Table 27 on page 199)
- Contact (see Table 28 on page 203)
- Contact Denormalization (see Table 29 on page 208)
- Employee (see Table 30 on page 212)
- Opportunity (see Table 31 on page 216)
- Order (Sales Credit Assignment) (see Table 32 on page 220)
- Organization (see Table 33 on page 225)
- Position (see Table 34 on page 229)
- Product Defect (see Table 35 on page 234)
- Product Denormalization (see Table 36 on page 238)
- Project (see Table 37 on page 242)
- Project Team (see Table 38 on page 246)
- Service Request (see Table 39 on page 251)

To view values for an assignment object

1. Start Siebel Tools.
2. In the Workflow Policy Objects window, select the assignment object.

   NOTE: Objects are listed alphabetically by parent name of the assignment object.

3. In the Object Explorer, expand Workflow Policy Object, and then 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 24 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 23 on page 172.

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 24. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Person-based Note: Not used in the Siebel MidMarket product.
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

Table 24. Account Object Run-Time Parameters

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	Not used in the Siebel MidMarket product
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)	

Table 24. Account Object Run-Time Parameters

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)	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	

Table 24. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary Denorm Column	
Org Primary Manual Column	
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	S_ORG_BU
Org Team Score Column	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_ORG_EXT
Set Primary Employee	FALSE

Table 24. Account Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	TRUE
Set Primary Position	TRUE
Skill Item Table	S_ORG_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_ORG_SKILL Note: Not used in the Siebel MidMarket product.

Activity Object Parameters

Table 25 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 23 on page 172.

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 Territory Assignment Manager to assign these objects. The Field Service Activity object is the one exception and is, by default, available for assignment (Lock Assignment parameter set to FALSE). Other activities must have the Lock Assignment parameter set to FALSE or null for assignment to occur.

Table 25. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
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

Table 25. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
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)	

Table 25. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
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
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	

Table 25. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
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)	
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	Not used in the Siebel MidMarket product
Primary Table	S_EVT_ACT
Set Primary Employee	TRUE

Table 25. Activity Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	S_ACT_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_ACT_SKILL Note: Not used in the Siebel MidMarket product.

Campaign Object Parameters

Table 26 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 23 on page 172.

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 26. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product

Table 26. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
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	Not used in the Siebel MidMarket product

Table 26. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
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)	
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

Table 26. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	Not used in the Siebel MidMarket product
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)	

Table 26. Campaign Object Run-Time Parameters

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
Primary Table	S_SRC
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	FALSE
Set Primary Position	TRUE
Skill Item Table	S_CAMP_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_CAMP_SKILL Note: Not used in the Siebel MidMarket product.

Campaign Contact Object Parameters

Table 27 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 23 on page 172.

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 27. Campaign Contact

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	Organization-oriented
Assignment Scoring Mode	Person-based Note: Not used in the Siebel MidMarket product.
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	

Table 27. Campaign Contact

Run-Time Parameter	Default Value
Default Org (Default Organization)	Default Organization
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	Not used in the Siebel MidMarket product
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)	

Table 27. Campaign Contact

Run-Time Parameter	Default Value
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)	
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

Table 27. Campaign Contact

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_CAMP_CON
Set Primary Employee	FALSE

Table 27. 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	Not used in the Siebel MidMarket product
Skill Table	Not used in the Siebel MidMarket product

Contact Object Parameters

Table 28 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 23 on page 172.

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 28. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Person-based Note: Not used in the Siebel MidMarket product.
Auto Reassign	TRUE

Table 28. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
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	Not used in the Siebel MidMarket product

Table 28. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
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)	
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

Table 28. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
Org Primary System Column	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	Not used in the Siebel MidMarket product
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)	

Table 28. Contact Object Run-Time Parameters

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
Primary Table	S_CONTACT
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	TRUE
Set Primary Position	TRUE
Skill Item Table	S_CON_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_CON_SKILL Note: Not used in the Siebel MidMarket product.

Contact Denormalization Object Parameters

Table 29 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 23 on page 172.

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 29. Contact Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
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 29. 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	Not used in the Siebel MidMarket product
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)	

Table 29. Contact Denormalization 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	
Org System Column	

Table 29. Contact Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Table (Organization Table)	
Org Team Score Column	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_CONTACT
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	Not used in the Siebel MidMarket product
Skill Table	Not used in the Siebel MidMarket product

Employee Object Parameters

Table 30 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 23 on page 172.

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 30. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
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	
Employee Denorm Column (Employee Team Denorm Column)	

Table 30. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
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)	
Group Primary System Column (Rule Primary System Column)	

Table 30. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
Org System Column	
Org Table (Organization Table)	

Table 30. Employee Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Team Score Column	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_USER
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	S_EMP_SKILL_IT Note: Not used in the Siebel MidMarket product
Skill Table	S_EMP_SKILL Note: Not used in the Siebel MidMarket product

Opportunity Object Parameters

Table 31 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 23 on page 172.

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 31. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Person-based Note: Not used in the Siebel MidMarket product.
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

Table 31. Opportunity Object Run-Time Parameters

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	Not used in the Siebel MidMarket product
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)	

Table 31. Opportunity Object Run-Time Parameters

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)	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	

Table 31. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Primary Denorm Column	PR_BU_DNRM_FLG
Org Primary Manual Column	PR_BU_MANL_FLG
Org Primary System Column	PR_BU_SYS_FLG
Org System Column	
Org Table (Organization Table)	S_OPTY_BU
Org Team Score Column	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_OPTY
Set Primary Employee	FALSE

Table 31. Opportunity Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	TRUE
Set Primary Position	TRUE
Skill Item Table	S_OPTY_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_OPTY_SKILL Note: Not used in the Siebel MidMarket product.

Order (Sales Credit Assignment) Object Parameters

Table 32 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 23 on page 172.

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 32. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product

Table 32. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
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	Not used in the Siebel MidMarket product

Table 32. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
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)	
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

Table 32. Order 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	Not used in the Siebel MidMarket product
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)	

Table 32. Order Object Run-Time Parameters

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
Primary Table	S_ORDER
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	Not used in the Siebel MidMarket product
Skill Table	Not used in the Siebel MidMarket product

Organization Object Parameters

Table 33 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 23 on page 172.

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 33. Organization Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
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 33. 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	Not used in the Siebel MidMarket product
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 33. 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 33. 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	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_BU
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 33. Organization Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	S_BU_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_BU_SKILL Note: Not used in the Siebel MidMarket product.

Position Object Parameters

Table 34 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 23 on page 172.

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 34. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	

Table 34. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
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	Not used in the Siebel MidMarket product
Exclude Column (Lock Assignment Column)	
Group Column (Rule Column)	

Table 34. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
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)	
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

Table 34. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
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	Not used in the Siebel MidMarket product
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	

Table 34. Position Object Run-Time Parameters

Run-Time Parameter	Default Value
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	Not used in the Siebel MidMarket product
Primary Table	S_POSTN
Set Primary Employee	TRUE
Set Primary Group (Set Primary Rule)	TRUE
Set Primary Org	FALSE
Set Primary Position	TRUE
Skill Item Table	S_POS_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_POS_SKILL Note: Not used in the Siebel MidMarket product.

Product Defect Object Parameters

Table 35 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 23 on page 172.

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 35. Product Defect Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	FALSE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
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 35. 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	Not used in the Siebel MidMarket product
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)	

Table 35. Product Defect 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)	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	

Table 35. Product Defect Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Table (Organization Table)	
Org Team Score Column	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_PROD_DEFECT
Set Primary Employee	TRUE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	Not used in the Siebel MidMarket product
Skill Table	Not used in the Siebel MidMarket product

Product Denormalization Object Parameters

Table 36 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 23 on page 172.

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 36. Product Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
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 36. 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	Not used in the Siebel MidMarket product
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 36. Product Denormalization 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	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	
Org Primary System Column	
Org System Column	

Table 36. Product Denormalization Object Run-Time Parameters

Run-Time Parameter	Default Value
Org Table (Organization Table)	S_PROD_INT_BU
Org Team Score Column	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_PROD_INT
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	Not used in the Siebel MidMarket product
Skill Table	Not used in the Siebel MidMarket product

Project Object Parameters

Table 37 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 23 on page 172.

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 37. Project Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
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 37. 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	Not used in the Siebel MidMarket product
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 37. 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 37. 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	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_PROJ
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE

Table 37. Project Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Position	FALSE
Skill Item Table	S_PROJ_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_PROJ_SKILL Note: Not used in the Siebel MidMarket product.

Project Team Object Parameters

Table 38 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 23 on page 172.

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 38. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
Add Team Members (Replace Team Members)	TRUE
Assignment Mode	
Assignment Scoring Mode	Not used in the Siebel MidMarket product
Auto Reassign	FALSE
Calendar Activity Additional Fields	
Calendar Create Activity	

Table 38. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
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
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 Note: Not used in the Siebel MidMarket product.
Exclude Column (Lock Assignment Column)	ASGN_USR_EXCLD_FLG

Table 38. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
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)	
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

Table 38. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
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	
Org System Column	
Org Table (Organization Table)	
Org Team Score Column	Not used in the Siebel MidMarket product
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	

Table 38. Project Team Object Run-Time Parameters

Run-Time Parameter	Default Value
Position Primary Manual Column	
Position Primary System Column	
Position System Column (Position Team System Column)	
Position Table	
Position Team Score Column	Not used in the Siebel MidMarket product
Primary Table	S_PROJ_RSRC
Set Primary Employee	FALSE
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	FALSE
Set Primary Position	FALSE
Skill Item Table	S_PROJRSRC_SKLI Note: Not used in the Siebel MidMarket product.
Skill Table	S_PROJRSRC_SKL Note: Not used in the Siebel MidMarket product.

Service Request Object Parameters

Table 39 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 23 on page 172.

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. 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 Note: Not used in the Siebel MidMarket product.
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

Table 39. Service Request Object Run-Time Parameters

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	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	Not used in the Siebel MidMarket product
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 39. Service Request Object Run-Time Parameters

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	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	

Table 39. Service Request Object Run-Time Parameters

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	Not used in the Siebel MidMarket product
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	Not used in the Siebel MidMarket product
Primary Table	S_SRV_REQ
Set Primary Employee	TRUE

Table 39. Service Request Object Run-Time Parameters

Run-Time Parameter	Default Value
Set Primary Group (Set Primary Rule)	FALSE
Set Primary Org	TRUE
Set Primary Position	FALSE
Skill Item Tablet	S_SR_SKILL_IT Note: Not used in the Siebel MidMarket product.
Skill Table	S_SR_SKILL Note: Not used in the Siebel MidMarket product.

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