

# Oracle Fusion Cloud Customer Experience

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## **Understanding Scheduled Processes**

Oracle Fusion Cloud Customer Experience  
Understanding Scheduled Processes

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

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# 1 About This Guide

## Audience and Scope

This guide describes the scheduled processes of Oracle CX and contains guidance on how to use them. You can use this as a reference while working with scheduled processes.

This guide describes what a schedule process does, the roles that can access the scheduled process, and any prerequisites. It also describes the parameters of a scheduled process and indicates whether they're mandatory.

**Note:** Some CX Sales and Fusion Service scheduled processes are documented within the context of procedures that require them. If your process isn't documented in this guide, check the relevant implementation or administration guides for more information.

## Related Guides

You can refer to the related guides listed in the following table to understand more about the tasks covered in this guide.

Title	Description
Using Customer Data Management for CX Sales and Fusion Service	Describes how to manage customer information and identify and resolve duplicates, validate and verify addresses, and enrich data in Oracle CX Sales and Fusion Service.
Extending CX Sales and Fusion Service	Describes how to use tools to configure and extend Oracle CX Sales and Fusion Service.
Understanding Import and Export Management for CX Sales and Fusion Service	Describes how to import legacy and other data into Oracle CX Sales and Fusion Service using Import and Export Management, and export data out of these applications.
Implementing Sales	Describes tasks to configure and set up Sales.
Getting Started with Your Sales Implementation	Describes how to set up sales automation capabilities in Oracle CX using a case study to describe concepts and procedures.
Using Sales	Describes user tasks to help sales managers, salespeople, and other sales end users perform day-to-day business tasks.





# 2 Manage Scheduled Processes

## What are scheduled processes?

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends.

Some scheduled processes give you printable output. Those processes might have **Report** in their name.

Use the Scheduled Processes work area to run all the processes you've access to and to manage submissions. If you need access to this work area, ask your security administrator to assign you a role that gives you access, for example a custom role with the the Manage Scheduled Processes (FND\_MANAGE\_SCHEDULED\_PROCESSES\_PRIV) privilege. Other than the Scheduled Processes work area, you might be also able to run certain processes from other work areas.

## Jobs and Job Definitions

Each scheduled process that you run is based on a job. The job is the executable that controls what the process does. Each job needs a job definition, which, for example, identifies the parameters and other options you've set for the process. You or your administrator can create job definitions for Oracle Analytics Publisher reports so that users can run the reports as scheduled processes.

## Process Sets

A process set is a scheduled process that contains multiple processes or even other process sets. So, when you submit a process set, you're running more than process.

**Note:** When you submit certain scheduled processes, the job logic causes other processes to automatically run. But in this case, you're not submitting a process set that includes those other processes.

## Submission

When you submit a scheduled process, you can use its parameters to control how, and which records are processed. For example, a process includes only the transactions that were edited by the person you select for a Last Updated By parameter. Some scheduled processes don't have parameters.

As part of the submission, you can also set up a schedule for the process, for example to run once a week for two months. Every time a process runs, there's a unique process ID.

## Output

Some scheduled processes provide output in PDF, HTML, and other formats. For example, a process can import records and also produce output with details about those records. There are many types of output, for example a tax document or a list of transactions.

## Process Sets

A process set is a scheduled process that contains at least two processes. So you can run many processes in one go, for a specific purpose.

Processes in process sets run in a certain order, in serial or parallel, or by some other logic. For example, let's say we have a process set with three processes to do these three tasks:

- Validate and clean up records.
- Import the records.
- Give a report on the imported records.

## What They Contain

Process sets can have any number of individual scheduled processes and even other process sets. Sometimes, a single process set has multiple process sets that are nested. For example, a process set can include three processes and two process sets, one of which contains another process set.

### *Related Topics*

- [Example of Process Details for a Process Set](#)
- [Submit Scheduled Processes and Process Sets](#)
- [What are scheduled processes?](#)

## Submit Scheduled Processes and Process Sets



Use the Scheduled Processes work area to run all the scheduled processes that you have access to, including process sets. You can also submit many processes from other work areas.

Some of the processes that give you output are also reports that you can view from the Reports and Analytics work area or panel tab. You can find that panel tab in some work areas. It's quick to submit a scheduled process with the bare minimum steps. But there are many additional options you can set, for example, if you want to run the process on a schedule.

## Select the Scheduled Process and Define Parameters

Here's what you do:

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. Leave the type as **Job**, select the process that you want to submit, and click **OK**.

4. In the **Process Details** dialog box, enter at least the required parameters, if any.
  - o Some processes have no parameters at all.
  - o Some parameters depend on other parameters. For example, date range parameters might appear only after you select **By Date** for another parameter.
5. Click the **Advanced** button if you want to define the schedule, notifications, or output. Continue to the next steps. Or, just skip to the steps for finishing the submission, to run the process once as soon as possible with the default output.

## Define the Schedule

Set up a schedule to run the process on a recurring basis or at a specific time. Use the Process Details dialog box in Advanced mode.

1. Open the Schedule tab and select **Using a schedule** for the **Run** option.
2. Select a frequency, for example **Daily** or **Monthly**.
  - o Select **User-Defined** if you want to enter the exact dates and times to run the process.
  - o You can select **Use a Saved Schedule** to use an existing schedule, if there are any.
3. Depending on the frequency you selected, define when the process should run.

Some processes can't be run more often than a certain frequency, for example more than every 10 minutes. But there are some situations where that validation doesn't apply, for example, when different users run that same process less than 10 minutes apart. Or, if you use a saved schedule that has an individual run in addition to the regular frequency, for example a schedule that runs every 10 minutes and once at five minutes after the first run.

## Define the Output

You can choose the layout, format, and destination for your output. Use the Process Details dialog box in Advanced mode.

1. Open the Output tab, if available.
2. Click **Add Output Document**.
3. Change the name if you want. The name identifies this output document when you go to view output later.
4. Select a layout if you have more than one to choose from.
5. Select a format, for example one of these options:
  - o **PDF:** Is the best option if you want to print the output.
  - o **Excel:** Supports embedded images, such as charts and logos, but can be opened only in Excel 2003 or higher.
  - o **Data:** Gives you report data in an XML file, which is used mainly for editing the report layout.
6. Click **Add Destination** to send the output somewhere, for example to a printer or email address. You can add many destinations and send the output to all of them at the same time.

**Tip:** You can also print the output as part of the steps for finishing the submission, instead of adding a printer destination here.

7. To add more output documents, repeat steps 2 to 6.

## Set Up Notifications

You can have notifications sent out depending on how the process ends. Use the Process Details dialog box in Advanced mode to set that up. These notifications are in English and they show times in UTC, no matter what language and time zone the recipient has in their preferences.

1. Open the Notification tab.
2. Click **Create Notification**.
3. From the **Address Type** list, select whether you want to identify the recipient by their email address or user ID.
4. In the **Recipient** field, enter either the email address or user ID of the person you want to send the notification to.
5. In the **Condition** list, select when to send the notification, for example when the process ends in error.
6. Click **OK**.
7. To send notifications to more people, repeat steps 2 to 6.

## Finish the Submission

Follow these steps in the Process Details dialog box:

1. Click the **Process Options** button if you want to define settings that affect the data to be processed.
2. If the process gives you output and you want to print it, select the **Print output** check box and a printer.
3. Select the **Notify me when this process ends** check box if you want to get a notification. This notification is in English and shows times in UTC, no matter what language and time zone you have in your preferences.
4. Enter submission notes to capture any information you want to associate with this submission. You can use your notes to find this submission later.
5. Click **Submit**.
6. Click **OK** to confirm.

**Tip:** Note down the process ID for your submission if you might need to easily find it later. For example, let's say you set the process to run once a week. If you later want to cancel all runs on this schedule, you need to cancel this original submission with the process ID you see.

## Submit Process Sets

To submit a process set from the Scheduled Processes Overview page:

1. Proceed with the steps that you would follow to submit any scheduled process, but select **Job Set** for the **Type** option.
2. In the Process details dialog box, set parameters for individual processes in the set. A process set itself doesn't have parameters.
  - a. Select a process on the Processes tab.
  - b. Enter parameters for that process, if any.
  - c. Repeat for other processes in the set.
3. Define the schedule, output, and notifications for the process set, as you would do for any scheduled process.
4. Set any other options and click **Submit**.

Whether you use the Notifications tab or the **Notify me when this process ends** check box, or both, notifications are sent when the entire process set ends, not when each process within the set ends.

### Related Topics

- [Examples of Process Options](#)
- [Example of Process Details for a Process Set](#)
- [View Status and Other Details for Scheduled Processes](#)
- [View Analytics, Reports, and Dashboards](#)

## Examples of Process Options

When you submit scheduled processes, click the **Process Options** button in the Process Details dialog box to set options such as language and time zone.

Here are a few things to know:

- Your settings affect the data to be processed and what you get in the output.
- If the process is running on a schedule, your settings apply to every run.
- The settings override what's set in general preferences, which you can get to by clicking your user name in the global header and selecting **Set Preferences**.

Let's take a look at some examples of process options that you can set.

### Language

You set the language process option to Spanish, while the Current Session field is set to Japanese in your general preferences. So, your output is in Spanish. If you don't set the language process option, the output is in Japanese.

### Currency

You set the currency process option to Euro, while your general currency preference is set to Yen. The scheduled process makes calculations based on the Euro, and the output shows all monetary amounts in Euro.

## Example of Process Details for a Process Set

When you're submitting a process set with the Process Details dialog box, you can open the Processes tab to see what's in the process set. Here's the information you get for every process in the process set.

- **Process Name:** A process in the process set.
- **Path:** The step ID of the process, preceded by the step ID of the process set that the process is nested under, if any. Every process and nested process set in the process set that you're submitting is considered a step and has a unique step ID.
  - **Tip:** If a process shows up more than once in the process set you're submitting, use the path information to differentiate between those instances.
- **Parent Process Set:** The direct parent of the process, either the process set you're submitting or the process set that the process is nested under.

## Scenario

Let's try to understand what we are looking at in the Processes tab. Say you're submitting a process set called Full Cleanse and Import, which contains a Clean Records process and a nested Quick Import process set. The nested process set has two processes, one of which is the same Clean Records process.

- Clean Records process (with a step ID of `cleanRec1`)
- Quick Import process set (`QuickImpo1`), which has two processes:
  - Import Records process (`ImpoRec1`)
  - Clean Records process again (`cleanRec1`)

This table shows what we see in the Processes tab for this example.

Process Name	Path	Parent Process Set
Clean Records	<code>CleanRec1</code>	Full Cleanse and Import
Import Records	<code>QuickImpo1.ImpoRec1</code>	Quick Import
Clean Records	<code>QuickImpo1.CleanRec2</code>	Quick Import

## Manage Processes and View Output

### Statuses of Scheduled Processes

After you submit a scheduled process, it can go through many statuses until it reaches a final state.

This table explains the statuses you might see. The Action Required column tells you if something can be done for the process:

- **No (in progress):** The process was submitted and hasn't reached a final state yet. But you or administrators don't need to do anything to move the process along.
- **Yes:** You or administrators need to do something to get the process to another status.
- **No (final):** The process has reached a final state, and nothing else can be done.

Status	Description	Action Required?
Blocked	At least one other running process is incompatible with and currently blocking your process. The situation will be automatically fixed.	No (in progress)
Canceled	The process was canceled, and you can't restart it.	No (final)

Status	Description	Action Required?
Canceling	The process is currently moving to the Canceled status.	No (in progress)
Completed	The main part of the process completed, and postprocessing (such as sending notifications and generating output) has started.	No (in progress)
Error	The process finished running and ended with errors.	No (final)
Error Auto-Retry	The process ended with errors but will automatically run again.	No (in progress)
Error Manual Recovery	The process ended with errors and requires an administrator to move the process to a final state.	Yes
Expired	The process didn't run and its schedule already ended. You can't restart it, but you can resubmit with the same parameters or submit a new process.	No (final)
Finished	The process ran based on a schedule, and it's either a process set or a process that causes other processes to automatically run. Either way, all processes involved are done running.	No (final)
Hold	The process is put on hold and needs someone to release it before it can continue running.	Yes
Paused	The process is paused so that another process that was automatically kicked off can run first.	No (in progress)
Pending Validation	Some validations, for example related to security, are performed on the process before it runs.	No (in progress)
Ready	The process passed validation and is about to start running.	No (in progress)
Retrying	The process resulted in an error but will try again. It will automatically rerun at the time you see in the Scheduled Time column on the Scheduled Processes Overview page. The number of retries depends on how the job is set up. After all the retries, if the process still can't run successfully, it will end with the Error status.	No (in progress)

Status	Description	Action Required?
Running	The main part of the process is currently running.	No (in progress)
Schedule Ended	The last submission in a schedule has happened for a process that's either a process set or a process that causes other processes to automatically run. Either way, all processes involved have started running, but might not be done yet.	No (in progress)
Succeeded	The process successfully completed.	No (final)
Validation Failed	The process failed validation.	No (final)
Wait	The process passed validation but isn't running yet.	No (in progress)
Warning	The process finished running and ended with a warning, for example, that a notification wasn't sent.	No (final)

*Related Topics*

- [View Status and Other Details for Scheduled Processes](#)

## View Status and Other Details for Scheduled Processes

After you submit a scheduled process, you can track its progress. Processes can finish running in seconds, or a few minutes, or even longer.

If something interrupts a process while it's running, for example a server restarting, then the process automatically picks up where it left off. If you need to see all processes, not just the ones you submitted, ask your security administrator to assign you a custom role that has the ESS Monitor Role (ESSMonitor) or ESS Operator Role (ESSOperator).



Here's where you can find processes that were submitted:

- Scheduled Processes work area

Search Results ?

View  Flat List  Hierarchy

Actions ▼ View ▼ **Schedule New Process** **Resubmit** Put On Hold Cancel Process Release Process

Name	Process ID	Status	Scheduled Time	Submission Time
Payables Cash Requirement Report	37586	Succeeded	11/19/21 9:21 PM UTC	11/19/21 9:21 PM UTC
Process Click History Mapping Data	37554	Wait	11/19/21 10:00 PM UTC	11/19/21 9:00 PM UTC
Generate Relevancy Feed	37539	Wait	11/19/21 11:45 PM UTC	11/19/21 8:46 PM UTC
Generate Relevancy Feed Batch	37535	Succeeded	11/19/21 8:45 PM UTC	11/19/21 8:45 PM UTC

**Process Details** Status Details

**Payables Cash Requirement Report, 37586**

Status Succeeded Schedule Start 11/19/21 9:21 PM UTC External

Log  
 Attachment [ESS\\_L\\_37586](#)

Output

**Output & Delivery**

XML Data ↓ Republish ↻

Status All ▼

Output Name	Template	Format	Locale
Default Document	Payables Cash Requirement Report	PDF	English (Uni

- Other work areas with a section for scheduled processes, if available.

View  Flat List  Hierarchy

View ▼ **Resubmit** Status All ▼ Time Range Last 72 hours ▼

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters
Payables Cash Requirement Report	118283	Succeeded	5/21/20 08:59 PM...		2020-05-21, 2020-05-21, N
Initiate Invoice Approval Workflow	118242	Succeeded	5/21/20 08:54 PM...		300100009422512, 2017-1
Initiate Invoice Account Coding Workflow	118241	Succeeded	5/21/20 08:54 PM...		2017-11-15, 2017-11-14, 3
Validate Payables Invoices	118240	Succeeded	5/21/20 08:53 PM...		300100009422512, ALL, 2

## Check the Status in the Scheduled Processes Work Area

Here's how you find your scheduled process and see how it's doing.

**1. Click **Navigator** > **Tools** > **Scheduled Processes**.**

The Search Results table shows processes that were submitted in the last hour because the default saved search is **Last hour**. The table might be blank if nothing was submitted in the last hour.

- 2. If you don't see the process, click the **Refresh** icon or run a search. For the search, enter your own criteria or select another saved search. Here are a few examples of saved searches you can use:**
- Last 24 hours
  - Last 72 hours
  - Cancelable Processes

**Tip:** In the search results, select **Hierarchy** for the **View** option to see, for example, the structure of nested processes or process sets within a process set. For processes running on a recurring schedule, the parent node is the original submission, the child nodes each run in the schedule. If submission notes were entered when submitting the process, you can use the **Submission Notes** column to help identify the process.

- 3. Refresh the search results at any time to see the latest status of the process in the **Status** column. You can also check the **Start Time** column to see if the process has started running yet.**

**Note:** Times such as start time and scheduled time are shown in the time zone you set in your preferences. If you change your preferences, you can see the change in the Scheduled Processes work area next time you sign in.

- 4. To get more details about the status, select your process in the Search Results table and open the Status Details tab. Here's some of the information you might find:**

- Status description, which explains what the current status means.
- The position of the process with the Ready status, in the sequence of submitted processes. For example, if your process is queued up for submission at position 5, there are four processes that need to start running before your process starts.
- Duration of a process, based on its current status.
  - How long process has been blocked: If a process is blocked, you can see how long it has been in the blocked status. For blocked processes, you can also expand the Incompatibility section to get information about which incompatible processes are preventing yours from running.
  - How long process has been running: If a process is running or completed, you can see how long it has been in the running status. If your process is in progress, and it's blocking other processes, you can also see IDs of those processes, which can't run until yours is done.
  - How long process took to complete: If a process is completed, you can see how long it took to complete with Error, Finished, Warning, or Succeeded status.
- On the Status Details tab, you can also expand the Status of Items to Process section, if available. Here are a few things to know about the Status of Items to Process section:
  - This section isn't available for process sets. But, it's available for individual processes, including those within process sets, that are in these statuses:
    - Running
    - Completed
    - Succeeded

- Error
  - Error Auto-Retry
  - Error Manual Recovery
  - Canceled
  - Canceling
  - Warning
  - Hold
  - Paused
- If a specific process is predefined to show progress information through graphs, you can see that information in one or more graphs. For example, a process importing lines from a file might show a graph called Lines. You hover over parts of the graph to see how many lines are successfully imported, how many ended up in error, and how many are still pending. A process can have multiple graphs, depending on what it's working on.
5. With your process still selected in the Search Results table, optionally click the **View Log** button (if available), especially if information isn't available in the Status of Items to Process section. The type of information in the log varies, depending on the process. You can open the log from here only if the process is currently running. When the process is done, you might want to also take a look at the final log, if any, from the Process Details tab.

## View Other Details in the Scheduled Processes Work Area

To get more information about a scheduled process, select it in the Search Results table and see the Process Details tab that appears after the table. These are some of the details you might find:

- Completion text, which is automatically generated when the process reaches a final state. What you see depends on the process. For example, it might say that the process finished 1792 records in less than a second.
- The log attachment, for example for details about why the process ended in error.
- Report output that the process generated, if any.
- Parameters for the scheduled process.
  - Open the Parameter Names with Values subsection to see the parameters from the Process Details dialog box and the values that were entered when the process was submitted.
  - Use the All Parameter Values subsection for troubleshooting purposes, if you need to see the parameters and values in their actual, technical format. This subsection might have more parameters. For example, some processes run with additional parameter values that are derived from the parameter values you entered when you submitted the process.

## Monitor Scheduled Processes in Other Work Areas

Some work areas have a section where you can monitor the scheduled processes that were already submitted.

1. Go to the section if it's available, usually on the landing page of the work area.
2. Click the **Refresh** icon if you don't see any processes or need to see the latest status.
  - If you still don't see the process you're looking for, try changing the filters. If that doesn't help, use the Scheduled Processes work area instead.
  - If submission notes were entered when submitting the process, you can use the **Submission Notes** column to help identify the process.

3. Do either of these things to check on the progress of the process:
  - o For more details about the status, click the status link. For example, if a process is in the Ready status, you can click the **Ready** link in the **Status** column to see where the process is in the submission queue.
  - o Check the **Start Time** column to see if the process has started running yet. If it has, you can click the link in the **View Log** column to get information about how the process is running.

*Related Topics*

- [Statuses of Scheduled Processes](#)
- [What do I get if I view scheduled processes in a hierarchy?](#)
- [View Output from Scheduled Processes](#)
- [Cancel or Make Changes to Scheduled Processes](#)
- [Resubmit Scheduled Processes and Process Sets](#)

## Cancel or Make Changes to Scheduled Processes

Life is full of second chances! After a scheduled process is submitted, you can still cancel it or make other changes in the Scheduled Processes work area.

What you can do to the process depends on its status. Also, depending on what you've access to, you can even work on processes that someone else submitted. If you need to cancel processes that someone else submitted, ask your security administrator to assign you a custom role that has the ESS Administrator Role (ESSAdmin).

### Make Changes to Processes

Select the scheduled process in the Search Results table. Here are some things you might be able to do.

***Changes you can Make to Processes***

Task	Prerequisite	Procedure
<p>Edit Schedule</p> <p>Change the submission schedule, for example, to submit it biweekly instead of weekly.</p>	<p>This option is there only if you select the row with the process ID you got when you submitted the process to run on a schedule. The row should be the parent node when you view the search results in a hierarchy, and the status should be <b>Wait</b>.</p>	<p>From the <b>Actions</b> menu, select <b>Edit Schedule</b>.</p>
<p>Edit Output</p> <p>Change output options of a process, for example, from HTML format to PDF.</p>	<p>You can do this only if the process generates output, and hasn't started running yet.</p>	<p>From the <b>Actions</b> menu, select <b>Edit Output</b>.</p>
<p>Put On Hold</p> <p>Pause the process.</p>		<p>Click the <b>Put On Hold</b> button.</p>

Task	Prerequisite	Procedure
<p>Release Process</p> <p>Resume a process that's on hold so that it continues to run.</p>		Click the <b>Release Process</b> button.
<p>Change Process Priority</p> <p>Change the priority of a process to affect when it runs. When there are many submitted processes, those with a lower number, for example 2, would usually run before those with a higher number, for example 7.</p>	<p>You can do this only if your implementor has enabled priorities for scheduled processes, and you've a custom role that has the ESS Administrator Role (ESSAdmin).</p> <p>You can change priorities only for processes that have the <b>Blocked, Hold, Ready, or Wait</b> status.</p>	Click the <b>Change Process Priority</b> button.

**Note:** Even if the process hasn't started, you can't change the parameter settings. You can cancel the process and submit again with the parameter values you want.

## Cancel a Process

Select the scheduled process in the Search Results table, and click **Cancel Process**.

### Cancel a Process Running on a Schedule

If you submitted a process to run on a schedule, for example once a day, you can cancel the scheduled runs even if some of the runs already happened.

1. Find the original submission, the row with the process ID you got when you submitted the process. The row should be the parent node when you view the search results in a hierarchy, and the status should be **Wait**.
2. Click **Cancel Process**.

When you cancel this original submission, you cancel any current and future runs based on the schedule you had set.

### What to Do If Processes Take a Long Time to Cancel

Sometimes it takes a while for a process to finish canceling. So, you can use the **Actions** menu to end it. The option you get depends on the process.

#### Options and Descriptions

Option	Description
<b>Hard Cancel</b>	To end the process shortly after you canceled it, without waiting for the cancellation to finish by itself.
<b>Force Cancel</b>	To end a process that has been canceling for over 30 minutes but isn't done yet.

### Processes on Remote Servers

Some processes run on a remote server. Even if the status for the process that you hard or force canceled has changed to **Canceled**, the process might still be running on the remote server. With the scheduled process still selected in the Search Results table, you check the status of the remote process on the **Process Details** tab that appears after the table.

Option You Used to End Your Process	Field that Shows the Status of the Remote Process	Status of Process on Remote Server
Force Cancel	<b>Remote Process Status</b>	<ul style="list-style-type: none"> <li>• <b>Completed Successfully:</b> The remote process was successfully canceled within the 30 minute grace period.</li> <li>• <b>Running/Unknown:</b> Your scheduled process is in a Canceled state, but the remote process is still running.</li> <li>• <b>Terminated:</b> Your scheduled process is in a Canceled state, and the remote process is successfully canceled after the 30 minute grace period.</li> </ul>
Hard Cancel	<b>External Job Status</b>	<ul style="list-style-type: none"> <li>• <b>Completed Successfully:</b> The remote process has successfully canceled.</li> <li>• <b>Running/Unknown:</b> Your scheduled process is in a Canceled state, but the remote process is still running.</li> </ul>

## Cancel Processes in Bulk

You can cancel up to 100 processes at once, as long as the processes haven't reached a final state.

1. Click **Navigator > Tools > Scheduled Processes**.
2. In the Search section, select **Cancelable Processes** from the **Saved Search** list.
3. Make sure that what you get in the Search Results table meets these requirements:
  - No more than 100 processes
  - Only processes with a cancelable status:
    - Wait
    - Ready
    - Running
    - Completed
    - Blocked
    - Hold
    - Paused
    - Pending Validation
    - Schedule Ended
    - Error Auto-Retry
4. Use the Search section to change your search results, if you need to.
5. Select **Cancel Processes in Bulk** from the **Actions** menu.

### Related Topics

- [View Status and Other Details for Scheduled Processes](#)
- [Allow Updates to Scheduled Process Priority](#)

## Resolve Blocked or Incompatible Processes

If your scheduled process has a Blocked status, that means another process that's currently running is incompatible with your process and preventing your process from starting. Incompatible processes can't be running at the same time.

A process can be self-incompatible, which means it can't start if another submission for the same process is currently running. For example, if you get an error in the log saying that one or more requests are currently pending for definition, that means the process is self-incompatible.

There are two types of incompatibilities:

- **Global:** Incompatible processes can never run at the same time, including self-incompatible processes.
- **Domain-Specific:** Processes are incompatible only if they also have another matching criterion. So you might see that two processes are shown as incompatible, but notice that other submissions for the same two processes are running at the same time.

If you were able to submit a process but it's now blocked, here's how you can find what's incompatible:

1. Click **Navigator > Tools > Scheduled Processes**.
2. Select your process in the Search Results table and open the Status Details tab.
3. Expand the Incompatibility section to see which processes are incompatible with yours.

When you have a blocked process, you can go with one of these options:

- Wait for the incompatible process to finish running so that yours can start. Optionally find that process in the Search Results table and track its status.
- Cancel the incompatible process. For processes running on a schedule, view search results in a hierarchy and cancel the child node the represents what's currently running. Even after you cancel, it's possible your process won't start immediately, depending on how many other submissions there are.
- Put the incompatible process on hold so that your process can run. You might need to resubmit your process. For processes running on a schedule, view search results in a hierarchy and put on hold the child node the represents the next run. Release the process after yours is done running.

## View Output from Scheduled Processes

Other than processing records, some scheduled processes also give you output. When you submit the process, you can select the output layout and format, and set other output options.

In the Scheduled Processes work area, you can view the output and even republish it in a different format without resubmitting the process. You might be able to see the output from other work areas too.

### When You're In the Scheduled Processes Work Area

Here's what you do:

1. Click **Navigator > Tools > Scheduled Processes**.
2. Find your scheduled process and, if you need to, refresh the search results to see the latest status.
3. Select the scheduled process.
4. Go to the Output subsection on the Process Details tab.
5. Click the link in the **Output Name** column to view or download the output, which you can then print.
6. To view or export the output in a different format, follow these steps:

- a. Click the **Republish** button.
- b. Click the **Actions** icon.
- c. Select **Export**, and then select a format.

If you want the Data format, you can also just click the **XML Data** icon instead.

**Note:** On the Process Details tab, if you don't see an Output subsection, look for a Log and Output subsection. The output might be there instead as an attachment. This is likely if the Output tab isn't available when you submitted the process in Advanced mode.

## When You're In Other Work Areas

Some other work areas have a section, usually on the landing page of the work area, where you can monitor the scheduled processes that were already submitted. In the table there, find your process and click the **Output** icon in the **View Output** column.

### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## Resubmit Scheduled Processes and Process Sets

You can easily resubmit scheduled process using the exact same parameter values, if the process has a Succeeded status and wasn't part of a submission involving other processes.

For process sets, you can also resubmit after changing any of the parameters or other options.

### Resubmit Processes

In the Scheduled Processes work area, here's how you resubmit processes using the same parameters:

1. Click **Navigator > Tools > Scheduled Processes**.
2. In the Search Results table, select your process and take a look at its details, including parameter values.
3. Click **Resubmit**.

Some other work areas have a section, usually on the landing page of the work area, where you can monitor the processes that were already submitted. In the table there, you can also select your process, see its parameter values, and click the **Resubmit** button.

### Resubmit Process Sets

Resubmit process sets from the Scheduled Processes work area, not other work areas.

1. Click **Navigator > Tools > Scheduled Processes**.
2. See process details, including parameter values, for the processes that ran as part of your process set.
3. In the Search Results table, select your process set.
4. Click **Resubmit**, and you're done. Or, click the **Resubmit** drop-down button and select **Resubmit with Changes**.
  - a. In the Process Details dialog box, select a process on the Processes tab.
  - b. Change any of the parameters.



- c. Repeat and change parameters for any of the other processes in the process set.
- d. Define anything else as part of the submission, for example the schedule.
- e. Click **Submit**.

Both options to resubmit are available for process sets in either of these situations:

- The process set has any of the statuses in a final state, for example Succeeded or Canceled.
- The process set ran on a schedule and has either the Wait or Schedule Ended status. The option applies only to the original submission, the row with the process ID you got when you submitted the process to run on a schedule. The row would be the parent node when you view the search results in a hierarchy.

#### Related Topics

- [Submit Scheduled Processes and Process Sets](#)
- [View Status and Other Details for Scheduled Processes](#)

## FAQs for Scheduled Processes

### What happens to processes scheduled by a user who is no longer here?

If a user is inactive, for example because they left the company, the processes they submitted on a recurring schedule won't run.

For security reasons, it's best that you cancel that submission and schedule a new one if still needed. The same situation applies to users who are locked or failed to authenticate.

### Can I get notified every time a process within a process set ends?

No, notifications are sent only when the entire process set ends, not when each process within the set ends.

### Why don't notifications reflect my language or time zone?

All notifications for scheduled processes are in English and show times in UTC, no matter what language and time zone you have in your preferences.

This applies to notifications you get when you select the **Notify me when this process ends** check box. Or, when you set up notifications in the Notifications tab when you're submitting the process in Advanced mode.

## Why can't I force cancel a scheduled process?

The **Force Cancel** option is available only if the process has already been canceling for more than 30 minutes.

For some processes, you get a **Hard Cancel** option instead, which is available soon after you cancel the process. Which option you get depends on the process.

## How do I cancel or make changes to scheduled processes that are submitted to run on a recurring schedule?

First, if you can, find the process that was submitted on a recurring schedule by its process ID.

If you don't have the process ID, here's how you find it:

1. In the Scheduled Processes work area, search by the process name, the Wait status, and a submission time before the current date.
2. For the search results, select **Hierarchy** for the **View** option.
3. Select the parent node that represents the process submitted to run on a schedule.

With the process selected in the Search Results table, select what you want to do from the Actions menu. For example, **Edit Schedule** to change the end date or frequency, or **Cancel Process** to cancel the original submission and all remaining runs.

If the **Edit Schedule** option isn't available, it's likely that the process was submitted outside the application, for example through a SOAP web service. And, the schedule was defined with iCalendar in a way that doesn't map to what you can define on the Edit Schedule page.

## Why doesn't the time zone for a submitted process match the time zone I used to submit or search for the process?

When you submit a process, you can select the time zone to use to define a recurring schedule.

You can also click the **Process Options** button and set a time zone just for that submission, which affects for example any parameters and output. When you search by submission time in the Scheduled Processes work area, you can also select a time zone.

But, when showing information about processes that were already submitted, the work area always reflects the time zone you set in your preferences. For example, this applies to the scheduled start time you see in the Search Results table and the Process Details tab. If you change your preferences, you can see the change in the Scheduled Processes work area next time you sign in.

## What's the maximum number of scheduled processes that can run at the same time?

It depends on the setup for your cloud service. If you need more information, contact your help desk.

## Why can't I find the scheduled process that I need to run?

It's possible that you don't have access to it. Ask your security administrator to assign you a role with the privilege that gives you access to that process. This is especially likely for custom processes.

When your administrator creates a new job definition, a new privilege is automatically created, and it's not assigned to anyone by default.

## Why can't I see Scheduled Processes in the Navigator or home page?

If you have a role that should give you access, but you still can't see Scheduled Processes in the Navigator or on the home page, it's possible that the work area isn't currently available to anyone.

Your administrator should make sure in the Structure work area that **EL Expression** is selected for the **Show on Navigator** list, and the EL expression is this:

```
#{(securityContext.userGrantedResource  
['resourceType=FNDResourceType;resourceName=FND_Scheduled_Processes_Menu;action=launch'])}
```

## Which role gives me access to the Scheduled Processes work area?

Any that has the Manage Scheduled Processes (FND\_MANAGE\_SCHEDULED\_PROCESSES\_PRIV) privilege. Ask your security administrator to assign you a custom role with this privilege.

## What do I get if I view scheduled processes in a hierarchy?

When you select **Hierarchy** for the **View** option, you might see some search results in a hierarchical structure. Here are some possibilities for what the hierarchy can represent.

### Hierarchy View

Parent Node	Child Nodes
A submitted process set.	The nested processes or process sets within the submitted process set.
A process or process set submitted to run on a schedule.	Each run in the schedule.
A process or process set that causes other processes to run automatically.	The other processes that run.

#### Related Topics

- [Process Sets](#)

## How can I export search results for scheduled processes to a spreadsheet?

Here's what you do:

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Overview page, expand the Search section and run your search.
3. If you're happy with the search results, click the **Download Results** button in the Search section.
4. In the Download Results dialog box, select the number of records you want to export.
5. Select the **Include Job's item counts** check box to include an **Items to Process (Success/Error/Total)** column in the spreadsheet.
6. Click **Download**.

**Tip:** If you see any difference between the spreadsheet and the Search Results table, refresh the table and then compare again.

# 3 Sales and Fusion Service Scheduled Processes

## Where to Find Information About Oracle Sales Scheduled Processes

Here are the scheduled processes that are available as part of Oracle Sales. The Oracle Understanding Scheduled Processes guide describes many of these scheduled processes and contains guidance on how to use them.

However, some CX Sales scheduled processes are documented within the context of procedures that require them, in the relevant implementation or administration guides.

### Assignment

- *Improve the Performance for Territory-Based Account Assignment*
- *Perform Object Sharing Rule Assignment Processing*
- *Refresh Access Control Data*
- *How do I request account assignment?*
- *Request Opportunity Resource Assignment*
- *Request Revenue Territory Assignment*
- *Run Access Group Membership Rule*

### Forecasting

- *Check Due Date*
- *Forecast Autopilot*
- *Refresh Forecast*

### Marketing Campaigns and Leads

- *Populate Lead Latitude and Longitude Information*

### Partner Management

- *Partner Program Enrollment Expiration Job*
- *Refresh Partner Dimension Members*

### Quota Management

- *Publish or Revise Hierarchy Quotas*

- [Synchronize Quotas](#)

## Sales Insights

- [Generate Sales Insight Facts](#)
- [Generate Sales Insight Facts Using Signals](#)
- [Generate Sales Insight Metrics](#)
- [Purge Redundant Sales Insight Facts](#)

## Sales Products

- [Import Sales Products Process](#)

## Territories

- [How do I delete a territory proposal?](#)
- [Refresh and Promote Dimension Members](#)
- [Refresh Territories from Resources](#)
- [Update Inheritance Recipients](#)

You can find more information about scheduled processes in the [Understanding Scheduled Processes](#) guide.

# Where to Find Information About Fusion Service Scheduled Processes

Here are the scheduled processes that are available as part of Oracle Fusion Service. The Oracle CX Understanding Scheduled Processes guide describes many of these scheduled processes and contains guidance on how to use them.

However, some Fusion Service scheduled processes are documented within the context of procedures that require them, in the relevant implementation or administration guides.

## Analytics

- [Cache Application Usage Insights Report Data](#)
- [Click History Data Purge Process](#)
- [Process Active Time Data](#)
- [Process Click History Mapping Data](#)
- [How do I refresh BI reports audit data for user adoption reporting?](#)
- [User Analytics Click Mapping Translation](#)

## Knowledge Management

- [Knowledge Article View Aggregation](#)

- *Knowledge Content Batch Process*
- *Knowledge Search Batch Process*

## Service Request Management

- *Deprecated - Aggregate Service Requests*
- *How do I delete messages from external email applications?*
- *Fully Loads Action Plan Actions Data for Reporting*
- *Incrementally Loads Action Plan Actions Data for Reporting*
- *Deprecated - Incrementally Loads SR Audit data for BI Reporting*
- *Monitor Action Plan Actions*
- *Monitor Service Request Milestones*
- *Purge Interactions*
- *Purge Omnichannel Events*
- *Refresh Service Categories for Reporting*
- *Service Request Queue Assignment*
- *Unlock Scheduled Process that Incrementally Loads SR Audit Data*

### Related Topics

- *Best Practices for Scheduled Processes in Fusion Applications*

## Where to Find Information About All Common CX Scheduled Processes

Here are the scheduled processes that are common to both CX Sales and Fusion Service. The Oracle CX Understanding Scheduled Processes guide describes many of these scheduled processes and contains guidance on how to use them.

However, some of these scheduled processes are documented within the context of procedures that require them, in the relevant implementation or administration guides.

## Applications Common Components

- *Generate Appointment Reminders*

## Application Composer

- *Schedule Custom Groovy Object Functions*

## Customer Center

- *Update Mass Transfer Request Status*

## Customer Data Model

- *Audit Party Hierarchy*
- *Classification Hierarchy Generation*
- *Cleanse Addresses Against Postal Reference Files*
- *Delete Child Entities of Inactive Party Records*
- *Delete or Truncate Interface Tables*
- *Generate Data Quality Keys*
- *Identify Duplicate Organization Person or Location Records*
- *Import Bulk Customer Data*
- *Why should I use the Maintain Party and Location Current Record Information process?*
- *Party Hierarchy Generation*
- *Purge Cleanse and Match Batch Data*
- *Purge Data Quality Keys*
- *Purge Duplicate Resolution Data*
- *Why can't I find inactive records for purging them?*
- *Populate Location Latitude and Longitude Information*
- *How do I refresh denormalized data for account hierarchy?*
- *How do I generate the resource reporting hierarchy?*
- *How do I synchronize financials accounts and contacts with CX Cloud?*
- *How do I synchronize the GUID of users?*
- *How do I validate geographies of addresses against master geographies and generate naming references?*

## Microsoft Office 365

- *Microsoft 365 Instant Sync*
- *Microsoft 365 Standard Sync*
- *Microsoft 365 Token Refresh*

## SaaS Enablement

- *Create Company Information*
- *Load and Update Oracle Fusion CRM Cloud Metrics*

## User Context

- *Age User Context Relevancy Feed*

### Related Topics

- *Best Practices for Scheduled Processes in Fusion Applications*



## Analytics

### Cache Application Usage Insights Report Data

Use the Cache Application Usage Insights Report Data scheduled process to cache data used for reports, visualizations, and processing in Application Usage Insights.

#### When to Use

This scheduled process:

- Caches Report Data to display the usage metrics in the Application Usage Insights application.
- This scheduled process is required for the Application Usage Insights Telemetry Application.
- This scheduled process is predefined as a daily scheduled job.
- The `ORA_ZCA_CH_DISABLE` profile option affects the execution of this job. If you set this profile option value to Yes, the harvested clicks aren't processed.

#### Privileges Required

Verify that you have the following privileges and roles:

- Privileges
  - Populate Click Description Process privilege (`ORA_ZCA_POPULATE_CLICK_DESCRIPTIONS_PRIV`)
- Roles
  - Sales Administrator
  - Sales VP
  - Sales Manager

#### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - This scheduled process automatically runs daily.
  - You can also schedule this process as needed.
- Execution Time:
  - This works against the set of clicks harvested. The number of records processed depends upon your environment.
  - This scheduled process completes running few hundreds of records within a minute.
- Compatibility:
  - None.

#### Parameters

None.

## Troubleshooting Information

- You can view the status of the job on the Scheduled Process navigation menu.
- If this scheduled process errored, the status is marked as errored.
- This scheduled process is idempotent and can be run multiple times. Running multiple times is however redundant.

## Click History Data Purge Process

Use the Click History Data Purge Process scheduled process to purge click history data older than the click history data purge setting.

### When to Use

This scheduled process:

- Aggregates the click data for reporting.
- This scheduled process is required for the Application Usage Insights Telemetry Application.
- This scheduled process is predefined as a daily scheduled job.
- Aggregates the click data for reporting.
- If this job isn't run, the User Analytics BI Subject Area will not work as expected.
- The `ORA_ZCA_CH_DISABLE` profile option affects the execution of this job. If you set this profile option value to Yes, the harvested clicks aren't processed.

### Privileges Required

Verify that you have the following privileges or roles:

- Privileges
  - Populate Click Description Process privilege (`ORA_ZCA_POPULATE_CLICK_DESCRIPTIONS_PRIV`)
- Roles
  - Sales Administrator
  - Sales VP
  - Sales Manager

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - This scheduled process automatically runs daily.
  - You can also schedule this process as needed.
- Execution Time:
  - This works against the set of clicks harvested. The number of records processed depends upon your environment.

- This scheduled process completes running few hundreds of records within a minute.
- Compatibility:
  - None

## Parameters

None.

## Troubleshooting Information

- You can view the status of the job on the Scheduled Process navigation menu.
- If this scheduled process errored, the status is marked as errored.
- This scheduled process is idempotent and can be run multiple times. Running multiple times is however redundant.
- To troubleshoot further, you must enable the Apps Logger to FINEST for the user running the scheduled process and collect the application logs.

## Process Active Time Data

Use the Process Active Time Data scheduled process to processes click data to calculate and persist the active time data.

## When to Use

This scheduled process:

- Aggregates the click data for reporting.
- This scheduled process is required for the Application Usage Insights Telemetry Application.
- This scheduled process is predefined as a daily job.
- Aggregates the click data for reporting.
- If this job isn't run, the User Analytics BI Subject Area doesn't work as expected.
- The `ORA_ZCA_CH_DISABLE` profile option affects the execution of this job. If you set this profile option value to Yes, the harvested clicks aren't processed.

## Privileges Required

Verify that you have the following privileges or roles:

- Privileges
  - Populate Click Description Process privilege (`ORA_ZCA_POPULATE_CLICK_DESCRIPTIONS_PRIV`)
- Roles
  - Sales Administrator
  - Sales VP
  - Sales Manager

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - This scheduled process automatically runs daily.
  - You can also schedule this process as needed.
- Execution Time:
  - This works against the set of clicks harvested. The number of records processed depends upon your environment.
  - This scheduled process completes running few hundreds of records within a minute.
- Compatibility:
  - None

## Parameters

None.

## Troubleshooting Information

- You can view the status of the job on the Scheduled Process navigation menu.
- If this scheduled process errored, the status is marked as errored.
- This scheduled process is idempotent and can be run multiple times. Running multiple times is however redundant.
- To troubleshoot further, you must enable the Apps Logger to FINEST for the user running the scheduled process and collect the application logs.

## Process Click History Mapping Data

Use the Process Click History Mapping Data scheduled process to update Click History data with mapping information.

## When to Use

This scheduled process:

- Adds additional detail on clicks to the data set.
- This scheduled process is required for the Application Usage Insights Telemetry Application.
- This scheduled process is predefined as an hourly job.
- If this job isn't run, the Application Usage Insights Application doesn't work as expected.
- The ORA\_ZCA\_CH\_DISABLE profile option affects the execution of this job. If you set this profile option value to Yes, the harvested clicks aren't processed.

## Privileges Required

Verify that you have the following privileges or roles:

- Privileges

- Populate Click Description Process privilege (ORA\_ZCA\_POPULATE\_CLICK\_DESCRIPTIONS\_PRIV)
- Roles
  - Sales Administrator
  - Sales VP
  - Sales Manager

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - This job runs daily automatically.
- Execution Time:
  - This scheduled process is predefined to work against the set of clicks harvested per one hour frequency. The number of records processed depends upon your environment.
  - This scheduled process completes running few hundreds of records within a minute.
- Compatibility:
  - None
  - This scheduled process is an independent process.

## Parameters

None.

## Troubleshooting Information

- You can view the status of the job on the Scheduled Process navigation menu.
- If this scheduled process errored, the status is marked as errored.
- This scheduled process is idempotent and can be run multiple times.
- To troubleshoot further, you must enable the Apps Logger to FINEST for the user running the scheduled process and collect the application logs.
- After this scheduled process completes successfully, you can successfully launch the Application Usage Insights App and view the different telemetry metrics. You can view the telemetry metrics by navigating from **Sales > Application Usage Onsites**.

## How do I refresh BI reports audit data for user adoption reporting?

Use the Refresh BI Reports Audit Data for User Adoption Reporting scheduled process to refresh the BI report audit tables for user adoption reporting.

This scheduled process interacts with the database to deliver and refresh data that you see in the BI reports for user adoption and usage tracking for the application.

## When to Use

This scheduled process:

- This scheduled process is used for supporting Reporting on User Adoption.
- There are no jobs that must be run before this job is executed.
- This scheduled process is used for collection and aggregating data needed for reporting on user Adoption.
- BI reports based on user adoption don't reflect the correct data, if this job isn't run.
- The User Session Activity Tracked profile option (FND\_TRACK\_USER\_ACTIVITY) must be enabled for this scheduled process.

## Privileges Required

Verify that you have the following privileges or roles:

- Privileges
  - ACM\_RUN\_CRM\_ANALYTICS\_REFRESH\_AUDIT\_TABLE\_JOB\_PRIV
- Roles
  - Sales Administrator
  - Sales VP
  - Sales Manager

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - It is recommended that you run this process once a day at the end of business.
- Execution Time:
  - It takes around 2 to 5 minutes to complete processing one batch of records.
  - This scheduled process completes running few hundreds of records within a minute.
- Compatibility:
  - There are no compatibility issues with other scheduled processes and itself.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Full Refresh	Mandatory	Specify Yes (Y) if you want to purge all the data.	Y or N	None	It is recommended that you run this scheduled process with Full Load ="N" to

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
					incrementally capture the audit data. This scheduled process performs better when run as an incremental Load.
Purge After (Months)	Mandatory	Specify the number of the months after which the audit data is purged.	Specify a number.		This parameter determines the retention period of the audit data. For example, you specify "13" as the value of this parameter, audit data older than 13 months is purged. Audit data up to 13 months is maintained.

## Troubleshooting Information

- If you configure this scheduled process to notify you in case of failures, you will receive reports of failures.
- This job can be restarted, if it doesn't run successfully.
- The job can be restarted in case of failures. No clean up activity is needed.
- The latest user adoption data is reflected in BI reports, if the job runs successfully.

## User Analytics Click Mapping Translation

Use the User Analytics Click Mapping Translation scheduled process to process the language independent mapping values and converts them to language dependent mapping values.

### When to Use

This scheduled process:

- Adds international content to the database.
- This scheduled process translates strings that are required for the Application Usage Insights Telemetry Application.
- This scheduled process goes through the seeded Flow Name and translates each of the flow name to the list of the languages enabled on your Point of Delivery (POD).
- This scheduled process is run automatically during each application version upgrade.
- This is an important scheduled process. If this scheduled process isn't run, the related features don't work as expected.

## Privileges Required

Verify that you have the following privileges and roles:

- Privileges
  - Populate Click Description Process privilege (ORA\_ZCA\_POPULATE\_CLICK\_DESCRIPTIONS\_PRIV)
- Roles
  - Sales Administrator
  - Sales VP
  - Sales Manager

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You must run this scheduled process when you first access data and then whenever new languages are enabled.
- Execution Time:
  - There are 20316 predefined flow names.
  - This scheduled process translates all the 20316 flow names to the list of languages enabled on your application environment.
  - It takes approximately three minutes to process these flows.
- Compatibility:
  - None.

## Parameters

None.

## Troubleshooting Information

- You can view the status of the job on the Scheduled Process navigation menu.
- To troubleshoot further, you must enable the Apps Logger to FINEST for the user running the scheduled process and collect the application logs.
- If this scheduled process errored, the status is marked as errored.
- This scheduled process is idempotent and can be run multiple times. Running multiple times is however redundant.
- After this scheduled process completes successfully, you can successfully launch the Application Usage Insights App and view the different telemetry metrics. You can view the telemetry metrics by navigating from **Sales > Application Usage Onsites**.



# Applications Common Components

## Generate Appointment Reminders

Use the Generate Appointment Reminders process to schedule and send appointment reminders. Once initiated, this process runs automatically and schedules appointment reminders according to your profile options, preferences and appointment settings.

If you're using the integration between CX Sales and Microsoft 365, you don't need to setup appointment reminders in CX Sales because your mail client automatically sends reminders.

### When to Use

This scheduled process

- Schedules and sends appointment reminders in accordance with the activity notification profile options, user preferences and appointment reminder.
- Must be run when reminder notifications are turned on in profile options.

### Privileges Required

Verify that you have the following privileges or roles:

- Roles:
  - Customer Relationship Management Application Administrator
- Privileges:
  - ZCA\_RUN\_APPOINTMENT\_REMINDER\_PRIV

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - This process only needs to be started once; thereafter it runs periodically to schedule and send appointment reminders.
- Compatibility:
  - This process starts Send Appointment Reminders process which sends notifications for the scheduled reminders.
  - This process is self-compatible. Starting it when it's running doesn't impact any process.

### Parameters

None.

## Troubleshooting Information

- If the scheduled process doesn't run successfully or is ended, it can be restarted. Remember that reminders are time sensitive. So this process starts scheduling reminders after the restart time.
- To verify the scheduled process is running successfully from the application, check for appointment reminders in email or notifications based on your configuration.

### Related Topics

- [Set Up Activity Notifications](#)
- [Overview of Activity Notifications](#)

# Application Composer

## Schedule Custom Groovy Object Functions

Use the Schedule Custom Groovy Object Functions scheduled process to make an asynchronous call to an external web service using an object function at a scheduled time. You can optionally define object functions to return values.

You can also specify typed parameters, which the caller will be required to provide values for, when the function is invoked. The supported return types and optional parameter types are the same as for global functions. However, scheduled processes only support object functions that have no parameters and that have String as the return type, if the function is defined to return values. So, if you're defining an object function to be used in a scheduled process, ensure that it has no parameters defined, and if you're defining the function to return a value, ensure that its return type is String.

Tip: Before you begin scheduling the object function, it's recommended that you perform the following steps:

- Record the API name of the object as the object name.
- Record the object function name.
- Ensure that the object function compiles and runs properly using validation or trigger invocation mechanism within Application Composer, where runtime message debugging is supported.

Test capacity runs to determine the best batch size to handle large data set. You can use scheduled processes in several scenarios. Here are a few examples of when you may need to schedule processes:

- To perform mass update of records based on certain criteria.
- To trigger workflows based on criteria that will be met in the future, as a workaround for time-based workflows.

To run custom logic with heavy updates that can be scheduled during off-hours.

A few things to note:

- You can write a function as complex as needed.
- You can write a function to return values in a .txt file.

The .txt file displays any values that the Groovy code returns. To view the .txt file of a process, click the status link for that process.

- Each scheduled process has a runtime limit of 30 minutes to run an object function. This is to prevent long-running jobs that can consume large amounts of resources to support object functions operating on large volumes of data.

**Note:** The 30 minute limit only applies to validation and execution of the object function operations specified for that run. As long as the required database transaction handling has begun within the allocated 30 minutes, the completion of the scheduled process can span past the 30 minute limit. This enables database inserts and updates of large data sets that often take a long time to complete their operation. Hence, the end-to-end processing time can be longer than 30 minutes. If your Groovy script triggers a long-running process that's implemented via ESS/PLSQL, any Groovy triggers already created on the target object won't get called. This is because ESS/PLSQL operates directly at the database level, bypassing ADF and the model layer.

- Each job run constitutes a transaction. This means that all the operations specified by the Groovy script in the object function have to run to completion to complete the transaction. Otherwise, the transaction is rolled back and no records are updated.
- Once the job execution starts, the **Cancel** button won't work and you can't cancel the job.
- If a record is updated, the **Last Updated By** value changes to the user who submitted the job, and the **Last Updated Date** value changes to the date and time of the update.
- The log file displays any errors occurred during the process. To view the log file of a process, click the status link for that process.

## Privileges Required

Verify that you have the following roles:

- Customer Relationship Management Application Administrator
- Application Implementation Consultant
- Master Data Management Application Administrator
- ZCX\_MANAGE\_EXTENSIBLE\_OBJECT\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- Call the web service using an object function at a scheduled time using the Scheduled Processes tool. You can process a set of records on a daily or weekly basis, asynchronously, when users don't need to see immediate feedback in the user interface.
- Schedule business logic code and update a set of records periodically, on a daily, weekly, or monthly basis, asynchronously, by just specifying the object's name and its function.

### Execution Time:

- Each scheduled process has a runtime limit of 30 minutes to run an object function. This is to prevent long-running jobs that can consume large amounts of resources to support object functions operating on large volumes of data.

**Note:** The 30 minute limit only applies to validation and execution of the object function operations specified for that run. As long as the required database transaction handling has begun within the allocated 30 minutes, the completion of the scheduled process can span past the 30 minute limit. This enables database inserts and updates of large data sets that often take a long time to complete their operation. Hence, the end-to-end processing time can be longer than 30 minutes. If your Groovy script triggers a long-running process that's implemented using scheduled jobs PLSQL, any Groovy triggers already created on the target object won't get called. This is because scheduled jobs PLSQL operates directly at the database level, bypassing ADF and the model layer.

- Due to the 30 minute limit on the object function execution, it's best to break up the work done in each object function execution. This can be best done by testing a series of capacity runs in a test environment. Using the same object function, each job execution can work off a subset of the total data to be processed. By scheduling the same job to run at regular time intervals, the full set of data can be processed over multiple job runs.

The tests can be done in the following number of steps:

1. Determine how much data can be processed in a 30 minute time interval.

The size of data to be processed in each run is controlled by the Groovy script in the object function. You can control the following factors using Groovy script changes in your object function:

- View criteria definition
- Data filter defined on the result set returned from the view criteria definition

**Note:** Database enhancements can be used to improve search effectiveness on view criteria and data filter results. For example, defining additional indexes on database columns search can return results much faster than a full table scan.

- Maximum fetch size specified by `setMaxFetch`, which normally defaults to 500 rows if not defined

If the data size chosen causes the job to fail with `ExprTimeoutException`, reduce the data size using `setMaxFetch`.

The amount of data that can be processed within a 30 minute limit's dependent on the complexity of the data, type of operation on that data, and the resultant database update operation complexity, all of which are subjected to traffic and resource contentions. Data complexity is a reflection of the attributes making up the object to be operated on, and the parent, child, and associated object structures that need to be traversed or updated to complete the operation. The more complex the data, the more costly it's to collect and manipulate the information needed to complete the operation.

For example, a simple custom object with very few attributes and no related parent, child, associated objects incurs the least cost whereas an out-of-the-box standard object such as Opportunity, with large number of attributes and multiple child and associated object relationships (such as account, contact, and lead) incurs a higher search and update cost. In terms of type of operations, insert operations incur the highest cost, followed by updates, followed by reads, with the cost increasing as amount of data processed increases. For update operations, the amount of data that can be processed depends on the cost of search operation and cost of updates, with the former dictated by the view criteria and latter by

the operations performed on the result set obtained from the search, as specified by the Groovy script in the object function. Database update operation is dependent on the type of operation specified in the object function. Reads don't incur any database update cost whereas insert and update operations do, increasing with the data complexity.

2. Determine how long each job takes to complete. Besides data size, the type of database operations needed to support the object function can greatly affect the completion of the job. Database data creation, updates, and deletes (when permitted by business rules) normally take a longer time to complete than data reads. The amount of time needed to complete database updates and creates transactions can far exceed that of the object function execution time. This cost is particularly high for cases where object data complexity is high. These costs are often seen in job completion times that far exceed the 30 minute limit. The time interval between the scheduled time and completion time of the job is the time taken to complete the job.
3. Schedule each job to run slightly over the job completion time. To ensure that the previous job is completed, it's best to add a few extra minutes to the job completion time obtained in step 2 while scheduling each job.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Object Name	Mandatory	Specify the object's API name For example, OpportunityVO.	N/A	None	The object name you provide here must be the same as the object's API name on Application Composer's Object Overview page. Also, if you have any jobs scheduled from a previous release you must change the object name to match the object's API name on Application Composer's Object Overview page.
Object Function	Mandatory	Specify the object's function name. For example, OpptyMsg	N/A	None	None

## Troubleshooting Information

- Each job run constitutes a transaction. This means that all the operations specified by the Groovy script in the object function have to run to completion to complete the transaction. Otherwise, the transaction is rolled back and no records are updated.
- Once the job execution starts, the Cancel button won't work and you can't cancel the job.
- If a record is updated, the Last Updated By value changes to the user who submitted the job, and the Last Updated Date value changes to the date and time of the update.

- The log file displays any errors occurred during the process. To view the log file of a process, in the Log and Output section, click the attachment link to download the console log file.

**Note:** If the object function was defined to have no return values, only the console log file is displayed and is downloaded when you click the link. Otherwise, an Attachment dialog opens with the console log file and the console text file.

- Review the log and note the failed record IDs.
- The runtime messages of scheduled Groovy object functions don't display the println messages. So, as a workaround, you can create a custom button for the object function with the println function, and then invoke that button from the object's detail page. See *Actions and Links* for information on creating buttons.

Adding the println function in object functions and enabling runtime messages can help determine the exact cause for failure. See *Runtime Messages* for more information about the println function.

## Assignment

### Perform Object Sharing Rule Assignment Processing

Use the Perform Object Sharing Rule Assignment Processing scheduled process to assign access group object sharing rules to assignment objects each time you add an access group and share rules.

#### When to Use

Use this scheduled process in the following cases:

- After creating an access group, you can create rules to provide the group with access to an object's records. You can define rules for both standard and custom objects. To create an object sharing rule, you specify the type of object access to be provided, the conditions under which the access is provided, and the groups to share the rule with. You then publish the rule to Assignment Manager. Finally, you run the Perform Object Sharing Rule Assignment Processing task to enable the resources in the associated access group to have access to the object data records. This scheduled process ensures that the access group sharing rules for each object are assigned properly.
- You can edit, delete, or inactivate object sharing rules at any time from either the Object Sharing Rules page or from the Edit Access Group: Object Sharing Rules subtab. Any changes you make are applied when the Perform Object Sharing Rule Assignment Process scheduled process is next run.
- Create access extension rules to extend the access defined for an object in an object sharing rule to a related object. For example, if you have secured access to an object such as Account using object sharing rules, you can extend the access defined for the Account object to a related object, such as Activity, by creating an access extension rule. All members of an access group who can access account data will then have access to activity data for the account with the access level you choose in the access extension rule. Run the Perform Object Sharing Rule Assignment Processing scheduled process to ensure that the access extension rule is assigned.
- You can also run this scheduled process to assign a batch of access group object sharing rules for all the available assignment objects. You can schedule these jobs to run regularly to ensure that all access group object sharing rules, records, and object data for your selected access groups are assigned and available to you.

**Note:** If there are more than 50 records included in the processing, then this scheduled process can't run for the same object simultaneously.

## Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - System Administrator
- Privileges:
  - No special privileges required

## Before You Use

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You must run this process periodically as per your business requirements to ensure you have the required access to all records and object data for your selected access groups.
  - If you require immediate access to new records and objects, you can manually submit the Perform Object Sharing Rule Assignment process to run immediately on need basis. For example, a rule already exists for the account object and you create a new account record. You won't have real time access to this record based on the existing object rule until the next scheduled run of the Perform Object Sharing Rule Assignment job. If you want to access the new account record immediately, you can submit the job on need basis.
  - We recommend that you run this scheduled process every hour.
- Compatibility:
  - No known dependencies with other scheduled processes.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Work Object	Mandatory	Select the work object you want from the drop-down list.	Parameter	Not applicable	None
Record Selection	Mandatory	You can run the assignment process on a subset of records.	All records. Enter a record selection value for these options:  Records updated in last 'X' days	Not applicable.  You might want to run the object sharing rule assignment process for an individual record (for each type of object) and confirm	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
			Records updated in last 'X' hours  Records updated between dates  Single record	the access group rule processing is correct before processing all records for an object.	
Record Selection Value	Optional	Applicable if you select any value in the Record Selection field except All.	None	Not applicable	None
Number of Work Objects per Sub Process	Optional	It is recommended that this value isn't changed. This number depends upon the Maximum Sub Processes per Process parameter's value.	Thousand is the default value.	Not applicable	None
Maximum Sub Processes per Process	Optional	<p>If the number objects created is less than 500 thousand, then leave the default option of 2 as the maximum number of sub processes per process. The following recommendation is only applicable for when this process is run for the first time or for a complete run for all objects. However, the next time you run the process, only the changed objects are processed. If you're executing incremental runs at periodic scheduled times, then there's no need to update the default value of 2.</p> <p>We recommend that changing this value if the number of objects is:</p> <ul style="list-style-type: none"> <li>Between 500 thousand and 1 million objects enter 5</li> <li>Greater than 1 million objects, enter 10</li> </ul>	Two is the default value.	Not applicable	None



Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
		<ul style="list-style-type: none"> <li>Greater than 5 million objects, enter 20</li> <li>Greater than 10 million objects, enter 30</li> </ul>			
Diagnostic Mode	Optional	Used for troubleshooting purposes.	Not applicable	None	None

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about these reports, see the Related Topics section.

### Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)

## Refresh Access Control Data

Use the Refresh Access Control Data scheduled process to perform full or incremental refresh of the denormalized tables containing access control data. You can use system access groups and predefined rules to support team-, territory-, and management hierarchy-based access to data for your users. You can also provide users with global access to object data, or with fine-grained access to data such as Personally Identifiable Information (PII) for the Contact object. System access groups provide an alternative way to manage user access to data for supported objects. There's a system access group to correspond to each of the standard sales and service job roles Oracle provides, and predefined object sharing rules assigned to each group provide the same access to supported object data as is provided by the standard job roles.

Running this process ensures that system groups shown on the UI reflect changes to the custom job roles and user-job role assignments in your environment.

### When to Use

This scheduled process:

- Updates system groups with changes to the custom job roles and user-job role assignments in your environment.

## Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator
  - IT Security Manager

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - This process is automatically run every hour to update system groups with changes to the custom job roles and user-job role assignments in your environment.
  - You can also run this process as needed.
- Execution Time:
  - Less than two minutes to process a batch.
- Compatibility:
  - No compatibility considerations or dependencies.
  - You can't run multiple instances of this scheduled process in parallel. If you try to more than one instance of this scheduled process, one of the instances will fail.
  - This scheduled process isn't incompatible with itself.
  - This scheduled process is lightweight and runs in incremental mode only so doesn't impact the server performance.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Refresh Type	Mandatory	Specify the type of refresh of data.	<ul style="list-style-type: none"> <li>• Incremental Refresh</li> <li>• Full Refresh</li> </ul>	Not Applicable	None

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.

## How do I request account assignment?

Use the Request Account Assignment scheduled process to request territory assignments for specified accounts. An account represents a company or person you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to.

Assignment manager lets you assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. You can use assignment rules defined for accounts only to filter the territories that are assigned to accounts.

### When to Use

Use this scheduled process in the following cases:

- By default, accounts are assigned automatically when the account is created or updated. Alternatively, sales people with access to the account team can run assignment for a specific account.
- You can run this scheduled process to run account assignments in bulk.
- You can run this scheduled process whenever there is a mass change in the account dimensional attributes. For example, change in address, organization type, organization size, auxiliary classifications, industries, and so on.
- You can run this scheduled process whenever there is any change in territory configuration.
- You can run this scheduled process after running Bulk import so that territories are assigned to the imported customers.
- Schedule this process if you don't auto assign territories but assign territories periodically.
- This scheduled process processes a set of accounts based on the view criteria chosen. For example, you can process all accounts modified after a particular date.
- If auto-assignment isn't enabled and this scheduled process isn't run, territories won't be assigned to accounts. The visibility of the accounts (view or edit access) is impacted, if you use territory-based data security.
- For a list of profile options that impact this feature, see the Related Topics section.

### Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator
- Privileges:
  - Run Sales Party Batch Assignment

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - See the table containing the view criteria information in the Parameters section.
- Compatibility:

- This scheduled process is incompatible with itself. These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues.
- Geography Name Referencing hierarchy data must be setup before running this scheduled process because the territory assignment uses Geography Name Referencing data.
- Ensure that groovy triggers aren't executed for user IDs that are used for assignments. If this check isn't performed, groovy triggers are executed for all accounts that get assigned and could lead to performance issues. For more information about these assignments, see the When are territories assigned to accounts topic in the Related Topics section.
- Multiple instances of this process running simultaneously can cause performance issues.
- Don't make any changes to the territory setup while running this scheduled process.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required
Work Object	Mandatory	Specify a predefined work object or the one you created.	Account	None
Candidate Object	Mandatory	Specify the candidate object.	Account Territory	None
Assignment Mode	Mandatory	Specify the assignment mode.	Territory	None
Rule Category Name	Optional	Specify if you're using rule-based assignment.	Don't select any value.	None
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None
View Criteria Bind Values	Optional	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	None
Replace Team	Optional	Specify the replace team information. This option isn't supported for Sales Account Assignment.	Yes or No	None
Number of Work Objects per Sub Process	Optional	It is recommended that this value isn't changed. This number depends upon the Maximum Sub Processes per Process parameter's value.	Thousand is the default value.	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required
Maximum Sub Processes per Process	Optional	<p>If the number objects created is less than 500 thousand, then leave the default option of 10 as the maximum number of sub processes per process. The following recommendation is only applicable for when this process is run for the first time or for a complete run for all objects. However, the next time you run the process, only the changed objects are processed. If you're executing incremental runs at periodic scheduled times, then there's no need to update the default value of 10.</p> <p>Oracle recommends changing this value if the number of objects is:</p> <ul style="list-style-type: none"> <li>Between 500 thousand and 1 million objects enter 5</li> <li>Greater than 1 million objects, enter 10</li> <li>Greater than 5 million objects, enter 20</li> <li>Greater than 10 million objects, enter 30</li> </ul>	Ten is the default value.	None
Metrics Logging Interval	Optional	Used for internal purpose only.	Don't change this value. 100 is the default value.	None
Test Data Parameters	Optional	Used for internal purpose only.	Don't change this value.	None
Diagnostic Mode	Optional	Used for troubleshooting purposes.	Not applicable.	None

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
SalesAccountsUpdatedSinceVC	Use this view criteria to assign accounts which haven't been previously assigned and have LAST_UPDATED_DATE is greater than or equals the specified date and (LAST ASSIGNED DATE is empty or LAST ASSIGNED DATE is	BindLastUpdateDate= [YYYY-MM-DD HH:MM:SS]	Daily

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
	less than or equal to the specified date.		
<b>SalesAccountsAssignedBefore</b>	Use this view criteria to reassign accounts which have been previously assigned and have LAST_ASSIGNED_DATE (in the ZCA_SALES_ACCOUNTS table) less than the specified date.	<b>BindLastAssignedDate=</b> [YYYY-MM-DD]  <b>BindReassignmentBatchId=</b> [Territory Reassignment Batch ID]	Daily
<b>SalesAccountTerritoryBatchReassign</b>	Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch. This view criteria is also used internally to initiate immediate or automatic assignments after territory proposal activation and territory dimension updates.	<b>BindReassignmentBatchId=</b> [Territory Reassignment Batch ID]	Run as per business requirements
<b>SalesAccountBulkImportVC</b>	Use this view criteria to assign accounts created in a given customer import batch.  This view criteria is also used internally to initiate immediate/automatic assignments after customer import.	<b>BindReassignmentBatchId=</b> [Import Activity ID]	Run as per business requirements
<b>SalesAccountDimsForPartyVC</b>	Use this view criteria to assign the account with the specified account ID.	<b>BindPartyId=</b> [Sales Account ID]	Run as per business requirements

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about these reports, see the Related Topics section.

### Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)
- [When are territories assigned to accounts?](#)

## Request Opportunity Resource Assignment

Use the Request Opportunity Resource Assignment scheduled process to run rule-based assignment on opportunities. During this process, assignment processing executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for opportunities.

If matching candidates are found, they're added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

### When to Use

This scheduled process:

- Assigns sales resources to an opportunity based on a set of rules such as assigning sales team members, including the opportunity owner.

### Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator
  - Setup User

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - See the table containing the view criteria information in the Parameters section.
- Compatibility:
  - This scheduled process is incompatible with itself. These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues.
  - High volume opportunities and revenue lines impact the performance.
  - We recommend that you don't run multiple instances of this scheduled process in parallel.

### Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
View Criteria Bind Values	Optional	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable
Number of Work Objects per Sub Process	Optional	Specify the number of work objects per sub process.	We recommend that you use the default value.	None	Not applicable
Maximum Sub Processes per Process	Optional	Specify the maximum number of sub processes per process.	We recommend that you use the default value.	None	Not applicable
Metrics Logging Interval	Optional	Specify the metrics for logging interval.	We recommend that you use the default value.	None	Not applicable
Refresh Forecast Automatically	Optional	Specify if the forecast must be refreshed automatically.	We recommend that you use the default value.	None	Not applicable
Diagnostic Mode	Optional	Used for troubleshooting purposes.	Not applicable	Not applicable	Not applicable

If the view criteria is relevant for your business, use the information in the Recommended Run Frequency column. Typically, most implementations don't use all of the view criteria.

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
OpenOpportunitiesUpdatedInLastNDays	All open opportunities which were updated in the last 30 days. Optionally, the user can enter a different number of days.	<ul style="list-style-type: none"> <li>• <b>BindOpptyUpdatedSince</b>=[3</li> <li>• <b>For example, opportunities updated in last 15 days:</b> <b>BindOpptyUpdatedSince=15</b></li> </ul>	Daily
OpenOpportunitiesUpdatedInLastNHours	All open opportunities which were updated in the last number of hours. Optionally, the user can enter a different number of days.	<ul style="list-style-type: none"> <li>• <b>BindOpptyUpdatedWithinHours</b></li> <li>• <b>For example, opportunities updated within the last 6 hours:</b> <b>BindOpptyUpdatedWithin=6</b></li> </ul>	Multiple times per day
OpportunityForImport BatchVO	All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory.	<ul style="list-style-type: none"> <li>• <b>BindBatchId</b></li> <li>• <b>For example:</b> <b>BindBatchId=5618782</b></li> </ul>	Run on need basis as per business requirements



View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
OpenOpportunities ByCreationDate	Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range.	<ul style="list-style-type: none"> <li>BindOpptyCreationDateTo=[date], BindOpptyCreationDateFrom=[date]</li> <li>For example: BindOpptyCreationDateTo=2015-02-29, BindOpptyCreationDateFrom=2015-01-01 or BindOpptyCreationDateFrom=2015-01-01. This second example processes all open Opportunities created between January 1, 2015 and the current date.</li> </ul>	Daily
OpenOpportunities ByEffectiveDate	Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range.	<ul style="list-style-type: none"> <li>BindEffectiveDateFrom [sysdate], BindEffectiveDateTo[sysdate [90]</li> <li>For example: BindEffectiveDateFrom=2015-01-01, BindEffectiveDateTo=2015-02-29</li> </ul>	Daily
SalesAccountUpdated InLastNDays	All open opportunities whose sales account got updated in the last 30 days. Optionally, the user can pass a different number of days.	<ul style="list-style-type: none"> <li>BindSalesAccountUpdated Since [30]</li> <li>For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15</li> </ul>	Daily
ClosedOpportunities ByCreationDate	Closed opportunities created in the last 90 days. Optionally, the user can pass a different date range.	<ul style="list-style-type: none"> <li>BindOpptyCreation DateTo [date], BindOpptyCreation DateFrom [date-90]</li> <li>For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29</li> </ul>	Daily
ClosedOpportunitiesBy EffectiveDate	Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.	<ul style="list-style-type: none"> <li>BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date]</li> <li>For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateT o=2015-02-29</li> </ul>	Daily
OpportunitySearchbyOpptyNumber	The opportunity with a specific number.	<ul style="list-style-type: none"> <li>BindOpportunityNumber=&lt;nu</li> <li>For example, BindOpportunityNumber=1700</li> </ul>	Run on need basis as per business requirements

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about the reports, see the Related Topics section.

### Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)

## Request Revenue Territory Assignment

Use the Request Revenue Territory Assignment scheduled process for territory-based opportunity assignment. This scheduled process evaluates opportunity revenue lines and matches eligible territories and their salespeople to the revenue lines.

### When to Use

This scheduled process:

- Runs territory-based assignment on opportunity product lines. During this process, the application evaluates every product line in the opportunity batch. Territories whose dimensions match the dimensional attributes of a given product line are then assigned to that line.

### Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator
  - Setup User

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - See the table containing the view criteria information in the Parameters section.
- Compatibility:
  - This scheduled process is incompatible with itself. These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues.
  - High volume opportunities and revenue lines impact the performance.

- o We recommend that you don't run multiple instances of this scheduled process in parallel.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable
View Criteria Bind Values	Optional	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable
Number of Work Objects per Sub Process	Optional	Specify the number of work objects per sub process.	Recommend that you use the default values.	None	Not applicable
Maximum Sub Processes per Process	Optional	Specify the maximum number of sub processes per process.	Recommend that you use the default values.	None	Not applicable
Metrics Logging Interval	Optional	Specify the metrics for logging interval.	Recommend that you use the default values.	None	Not applicable
Refresh Forecast Automatically	Optional	Specify of the forecast must be refreshed automatically.	Recommend that you use the default values.	None	Not applicable
Diagnostic Mode	Optional	Used only for troubleshooting purposes.	Not applicable	None	Not applicable

If the view criteria is relevant for your business, use the information in the Recommended Run Frequency column. Typically, most implementations don't use all of the view criteria.

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
<b>OpenOpportunities ByCreationDate</b>	Revenue lines of open opportunities created in the last 90 days.  Note that the view criteria bind values aren't required for the default date range, 90 days. You can pass a different date range by entering View Criteria Bind Values.	<ul style="list-style-type: none"> <li><code>BindOptyCreationDateTo=[date],BindOptyCreationDateFrom=[sysdate-90]</code></li> <li><b>For example:</b> <code>BindOptyCreationDateTo=2015-02-29, BindOptyCreationDateFrom=2015-01-01</code></li> </ul>	Daily

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
		<ul style="list-style-type: none"> <li>For example: BindOpptyCreationDateFrom This second example processes all open opportunities created between January 1, 2015, and the current date.</li> </ul>	
OpenOpportunitiesByEffectiveDate	Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, you can enter a different date range.	<ul style="list-style-type: none"> <li>BindEffectiveDateFrom=[sysdate], BindEffectiveDateTo=[sysdate [90]]</li> <li>For example: BindEffectiveDateFrom=2015-01-01, BindEffectiveDateTo=2015-02-29</li> </ul>	Daily
SalesAccountUpdated InLastNDays	Revenue lines of all open opportunities whose sales account was updated in the last 30 days. Optionally, you can enter a different number of days.	<ul style="list-style-type: none"> <li>BindSalesAccountUpdated Since=[30]</li> <li>For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15</li> </ul>	Daily
SalesAccountUpdatedInLastNHours	Revenue lines of all open opportunities whose sales account was updated in the last number of hours. Optionally, you can enter a different number of hours.	<ul style="list-style-type: none"> <li>BindSalesAccountUpdatedSinc</li> <li>For example, opportunities whose sales account was updated within last 6 hours: BindSalesAccount UpdatedSince=6</li> </ul>	Multiple times per day
OpenOpportunitiesUpdatedInLastN	Revenue lines of all open opportunities updated within the last four hours. Optionally, you can enter a different number of hours.	<ul style="list-style-type: none"> <li>BindOpptyUpdatedWithinHours</li> <li>For example, open opportunities updated within the last 6 hours: BindOpptyUpdatedWithin=6</li> </ul>	Multiple times per day
OpenOpportunitiesUpdated InLastNDays	Revenue lines of all open opportunities updated in the last 30 days. Optionally, you can enter a different number of days.	<ul style="list-style-type: none"> <li>BindOpptyUpdatedSince=[30]</li> <li>For example, open opportunities updated in last 15 days: BindOpptyUpdated Since=15</li> </ul>	Daily
FilterByBatchTag	Revenue lines of all open opportunities that contain a specific value in the Batch Tag field.	<ul style="list-style-type: none"> <li>BindBatchTag =[text]</li> <li>For example, open opportunities that have EMEA in the Batch Tag field: BindBatchTag =EMEA</li> </ul>	Run on need basis as per business requirements

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
<b>RevenueImportCriteria</b>	Revenue lines of all opportunities imported through the given bulk import batch ID. The view criteria bind value, BatchId, is mandatory.	<ul style="list-style-type: none"> <li>• <b>BindBatchId</b></li> <li>• <b>For example:</b> <b>BindBatchId=5618782</b></li> </ul>	Run on need basis as per business requirements
<b>ClosedOpportunitiesByCreationDate</b>	Revenue lines of closed opportunities created in the last 90 days. Optionally, you can enter a different date range.	<ul style="list-style-type: none"> <li>• BindOpptyCreationDateTo =[date], BindOpptyCreationDateFrom =[date]</li> <li>• For example: BindOpptyCreationDateTo =2015-02-29, BindOpptyCreationDateFrom =2015-01-01</li> </ul>	Daily
ClosedOpportunitiesByEffectiveDate	Revenue lines of opportunities closed in the last 90 days. Optionally, you can enter a different date range.	<ul style="list-style-type: none"> <li>• BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date]</li> <li>• For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateTo =2015-02-29</li> </ul>	Daily
<b>FilterByOpptyNumber</b>	Revenue lines of an opportunity with a specific number.	<ul style="list-style-type: none"> <li>• <b>BindOpptyNumber=&lt;number&gt;</b></li> <li>• BindOpptyNumber=17001</li> </ul>	Run on need basis as per business requirements. Usually run while troubleshooting in diagnostic mode.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about these reports, see the Related Topics section.

### Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)

## Run Access Group Membership Rule

Use the Run Access Group Membership Rule scheduled process to ensure that the access group membership rules are assigned and resources are added to a newly created group.

After this process is run, all resources that meet the specified condition criteria are added to the access group.

## When to Use

This scheduled process:

- Ensures that the access group membership rules are assigned.
- Once this process has run, all resources that meet the condition criteria are added to the access group.
- Resources are added to the group.
- If you delete or inactivate a membership rule, any users added to the group through the rule are removed when the Run Access Group Membership Rules scheduled process is next run.

## Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - It's best practice to schedule the process to run every 24 hours for all records updated in the previous 24 hours.
  - We recommend that you run this schedule process immediately after you edit the access membership rules.
- Execution Time:
  - Less than a minute to process one data record.
- Compatibility:
  - Don't schedule or start the Run Access Group Membership Rules process at the same time as the Reporting Hierarchy Generation scheduled process. The Reporting Hierarchy Generation process updates the reporting hierarchy in accordance with changes to the internal resource or partner organization hierarchies and impacts the assignment of access group membership rules if both processes run at the same time.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Record Selection	Mandatory	Specify the record.	Select a value.	None	None
Record Selection Value	Optional	Specify the record value.	Select a value.	None	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Number of Work Objects per Sub Process	Optional	Specify the number of work objects per sub process.	Recommend that you use the default values.	None	None
Maximum Sub Processes per Process	Optional	Specify the maximum number of sub processes per process.	Recommend that you use the default values.	None	None
Diagnostic Mode	Optional	Used only for troubleshooting purposes.	Not applicable.	None	None

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about these reports, see the Related Topics section.

### Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)

## Customer Center

### Update Mass Transfer Request Status

Use the Update Mass Transfer Request Status scheduled process to update status of the mass transfer requests.

#### When to Use

This scheduled process:

- Mass transfers requests that are In Progress status are changed to Error status. For example, a mass transfer request that's in In Progress status can be canceled using this scheduled process and you can resubmit the mass transfer request again.

## Privileges Required

Verify that you have the following roles:

- Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- Run as per need.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Mass Transfer Request	Mandatory	Specify the name of the request.	Select the name from the list of values.	None	This parameter is list of values driven.  The status of the selected request is set to Error.

# Customer Data Model

## Audit Party Hierarchy

Use the Audit Party Hierarchy scheduled process to validate the party hierarchy setup. Party Hierarchy should adhere to validation rules. Most of the validations are performed inline from import or UI.

## When to Use

This scheduled process:

- Verifies that a party hierarchy setup is valid and logs the details if any validation fails.

## Privileges Required

Verify that you have any of the following roles and privileges:

- Roles:
  - ORA\_AR\_ACCOUNTS\_RECEIVABLE\_MANAGER\_JOB
  - ORA\_AR\_ACCOUNTS\_RECEIVABLE\_MANAGER\_SOD\_JOB



- ORA\_AR\_BILLING\_MANAGER\_JOB
- ORA\_AR\_CUSTOMER\_ACCOUNT\_ADMINISTRATOR\_JOBORA\_ZCA\_CUSTOMER\_RELATIONSHIP\_MANAGEMENT
- ORA\_ZCH\_DATA\_STEWARD\_MANAGER\_JOB
- ORA\_ZCH\_MASTER\_DATA\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB
- ORA\_ZCH\_TRADING\_COMMUNITY\_DATA\_STEWARD\_JOB
- ORA\_ZPM\_CHANNEL\_ACCOUNT\_MANAGER\_JOB
- ORA\_ZPM\_CHANNEL\_ADMINISTRATOR\_JOB
- ORA\_ZPM\_CHANNEL\_OPERATIONS\_MANAGER\_JOB
- ORA\_ZPM\_CHANNEL\_PARTNER\_PORTAL\_ADMINISTRATOR\_JOB
- ORA\_ZPM\_CHANNEL\_SALES\_DIRECTOR\_JOB
- ORA\_ZPM\_CHANNEL\_SALES\_MANAGER\_JOB
- Privileges:
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_BATCH\_DUTY
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_PROCESS\_DUTY

## Before You Start

Review the following before scheduling this scheduled process:

- Compatibility:
  - No compatibility considerations or dependencies.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations	Notes
Hierarchy Type	Mandatory	Specifies the types of hierarchy.	Customer Hierarchy Duns and Bradstreet Hierarchy Partner Hierarchy Trading Community Partner Hierarchy	None	This parameter is List of Values driven.  PARTY_HIERARCHY_TYPE
Hierarchy Name	Optional	Name of a hierarchy	Any	None	Search and Select
Hierarchy Version	Optional	Version of the hierarchy.	Default: Active version	None	List of Values
Hierarchy Status	Mandatory	Status of the hierarchy.	Active  Inactive	None	List of Values  HZ_TREE_STATUS

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations	Notes
			Default: Active status		
Batch ID	Optional	Batch identifier	N/A	None	<b>Text Input Field</b>

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Modified hierarchy aren't validated and displayed. Any gaps are put into logs. No change is made to the tree.
- You must monitor the status of scheduled process to know that it was successfully completed.

## Classification Hierarchy Generation

Use the Classification Hierarchy Generation scheduled process to flatten the trading community classification hierarchies defined using Manage Classification Categories setup task.

### When to Use

Typically, any changes done to classification hierarchies using Manage Classification Categories setup task would be flattened immediately. This scheduled process should be run manually on demand, only when customer has identified issues with flattened data of classification hierarchies. In other words, run this scheduled process whenever changes are made to the classification category. You can run this scheduled process from the Manage Classification Categories setup task or from the schedule process UI.

### Privileges Required

Verify that you have the following roles and privileges:

- Role:
  - Administrators who have access to Manage Classification Categories setup task.
- Privilege:
  - Run Trading Community Classification Hierarchy Generation (HZ\_RUN\_TRADING\_COMMUNITY\_CLASSIFICATION\_REPORTING\_HIERARCHY\_GENERATION\_PRIV)

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can execute or schedule this scheduled process when needed.
  - We recommend that you execute or schedule this scheduled process off-peak times.

- Compatibility:
  - No known dependencies with other scheduled processes.
  - We recommend that you trigger multiple instances of this scheduled process simultaneously because this scheduled process is incompatible with itself.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations	Notes
Classification Category	Optional	Pick class category to be flattened. If not selected, all categories would be flattened.	Valid values from HZ_CLASS_CATEGORIES table	None	This parameter is List of Values driven.
		Flattening method, could either incremental flattening or force flattening. Default is incremental	INCREMENTAL_FLATTENINGFORCE_FLATTENING	None	This parameter is List of Values driven.

## Cleanse Addresses Against Postal Reference Files

Standardizes and validates a batch of addresses against country specific postal reference files.

### When to Use

This scheduled process is used to generate cleansed records for input data.

### Privileges Required

Verify that you have the following privileges or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator

### Before You Start

Review the following before scheduling this scheduled process:

- This batch cleansing scheduled process should be invoked by Address Cleansing jobs.

### Parameters

Batch cleansing parameter are passed by parent Address Cleansing jobs.

## Delete Child Entities of Inactive Party Records

Use the Delete Child Entities of Inactive Party Records scheduled process to delete all associated child entities of inactive party records. Delete child objects and related entities when the parent record is in an inactive or merged status.

When you delete parent record like account, contact, household, hub person or hub organization from the UI pages, web services, or file import, all child entities like contact points, relationships, address, source system references and so on aren't deleted automatically. So, you can delete these records by running this scheduled process on a regular basis.

You can inactivate all related child entities for the already inactivated parent party record. This resolves data integrity concerns and prevent export of child records of inactive parent records using Export Management.

The source system references of the following child entities of the inactivated Sales Account or Sales Contact are also inactivated:

- Additional Names
- Additional Identifiers
- Contact Points
- Contact Preferences
- AddressPurposes
- Address
- SourceSystemReference
- Classification
- Relationship

### When to Use

This scheduled process is used to inactivate the child entities of a deleted Sales Party. Once the Sales Account or Contact is inactivated or merged, all the child entities of that party can be inactivated.

### Privileges Required

Verify that you have the following role:

- Master Data Management Application Administrator

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process based upon your need. This is to inactivate the child entities of the deleted party. So it can be scheduled to run incrementally to inactivate the child entities of inactivated parties.
  - It can also be run ad-hoc based on the need basis.
- Execution Time:

- This scheduled process takes few minutes for completion for smaller set of data.
- This scheduled process may take 15 to 30 minutes to process a batch of 100K inactivated parties.
- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
From Date	Optional	Specify the starting date in the date range for searching inactive records.	Date	No	None
To Date	Optional	Specify the ending date in the date range for searching inactive records.	Date	No	To Date should be greater than From Date
Party ID	Optional	Specify the party identifier	Party identifier	No	None
Party Number	Optional	Specify the party number	Party number	No	None

## Troubleshooting Information

- Check the log or output file.
- If the scheduled process didn't run successfully, you can re-submit the process after rectifying the error.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.

### Related Topics

- [Import Management Post Processing Jobs](#)

## Delete Master Geography Data for the Selected Country

You can use this scheduled process to delete the master geography data for a particular country.

On deleting master geographies, all the related references like territory, tax zone, shipping zone, jurisdiction and so on become invalid. You must contact Oracle Support and raise a Support Request (SR). The Support team assists you to

run a script on your application to identify dependencies. If there are no dependencies, it's safe to delete geography data for that specific country.

## When to Use

This scheduled process deletes the geography data for a country.

## Privileges Required

Verify that you have any of the following roles or privileges:

- Roles:
  - Application Implementation Consultant
  - Sales Admin role containing ORA\_GEO\_ADMIN\_DUTY privilege.
- Privileges:
  - Run Trading Community Resource Reporting Hierarchy Generation
  - HZ\_RUN\_TRADING\_COMMUNITY\_RESOURCE\_REPORTING\_HIERARCHY\_GENERATION\_PRIV
  - HZ\_RUN\_TRADING\_COMMUNITY\_GEOGRAPHY\_NAME\_REFERENCING\_MAINTENANCE\_PRIV
  - HZ\_RUN\_TRADING\_COMMUNITY\_IMPORT\_BATCH\_PROCESS\_PRIV
  - ORA\_HZRESOURCE\_ORGANIZATION\_ADMINISTRATOR\_DUTY
  - ORA\_ZX\_TAX\_ADMINISTRATION\_DUTY\_CRM
  - ORA\_HRC\_HUMAN\_CAPITAL\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB
  - ORA\_ZCH\_MASTER\_DATA\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_BATCH\_DUTY
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_PROCESS\_DUTY

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You must create a support request with the details of the need to delete the master geography data for a country.

**Note:** When you delete the master geography data, the geography and its children are deleted. In turn, all the related territory, tax, and shipping zone references become invalid. For example, ERP relies on geography data to calculate tax, and if you accidentally delete the geography data, the tax calculations become invalid. Such deletions may also result in the re-provisioning of Point of Delivery (PODs) in some cases. So, you must back up this master geography data before deleting the master geography data.
- Compatibility:
  - This scheduled process is self-incompatible and also incompatible with the Group Territory Geographies.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Country Code	Mandatory	Specifies the Country for which data must be deleted.	Example: IN India	None	

## Delete or Truncate Interface Tables

Use the Delete or Truncate Interface Tables scheduled process to clean up the interface tables to improve the import performance. These import interface tables are for Account, Contact, and Household import.

### When to Use

This scheduled process is used to delete or truncate the interface tables, after a file-based import job is completed and the data is moved to the base tables from the interface tables.

### Privileges Required

Verify that you have the following privilege or role:

- Master Data Management Application Administrator

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process based upon your need. This is to remove data from HZ interface tables. If import is used to load high volume data, you can use this scheduled process to clean the data from interface table at regular intervals.
- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

## Parameters

You might need to specify some of the following parameters:

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Action Code	Mandatory	Action to be performed in interface or table.	Any	No	N/A
Truncate Interface	Optional	Truncate interface.	Any	No	Truncates Interface tables

**Note:** If there are no values passed this process exits and doesn't delete any tables. This scheduled process doesn't process any data when an active import is in progress.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Check the log or output file.
- If the scheduled process didn't run successfully, you can re-submit the process after rectifying the error.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.
- To verify that this scheduled process ran successfully from the application (and not from logs or pages), you can use the count of data deleted or truncated from interface table.

## Generate Data Quality Keys

Generates key values for new or updated accounts, contacts and addresses which are used for duplicate prevention and identification.

### When to Use

This scheduled process:

- Generates all record keys for account, contact, and address in rebuild for current active configuration.
- Generates new created or updated record keys for account, contact, and address in incremental key generation job for current active configuration.
- Generates record keys for account, contact, and address for a period of time for any selected configuration when required.

### Privileges Required

Verify that you have the following privilege or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator



## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - You can run this scheduled process when required or schedule it for appropriate frequency, such as minutes in repeat.
- Compatibility:
  - This scheduled process is self-incompatible for configuration code. If multiple instances are submitted for the same configuration code, the first instance runs and subsequent instances remain in Wait status.

## Parameters

The following table describes the list of parameters when the scheduled process must be run immediately.

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Match Configuration	Mandatory	Specify the configuration code.	Any	No	N/A
Start Time	Mandatory	Specify when the scheduled process must start.	Any	No	N/A
End Time	Mandatory	Specify when the scheduled process must end.	Any	No	N/A

The following table describes the list of parameters when the scheduled process must be scheduled to run at regular intervals. Use the Using a Schedule option in the Schedule tab to schedule to run the process.

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Frequency	Mandatory	Specify how frequently the scheduled process must be run.	Any	No	N/A
Time Between Runs	Mandatory	Specify the time between two scheduled process runs.	Any	No	N/A
Start Date	Mandatory	Specify the start date of the schedule.	Any	No	N/A

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
End Date	Mandatory	Specify the end date of the schedule.	Any	No	N/A

## Identify Duplicate Organization Person or Location Records

Identifies duplicates within a batch of records or against existing records in the database instance.

### When to Use

This scheduled process is used to generate matched records for candidates with current active configuration.

### Privileges Required

Verify that you have the following privilege or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator

### Before You Start

Review the following before scheduling this scheduled process:

- This batch match scheduled process should be invoked by Duplicate Identification or import jobs

### Parameters

Batch match parameter are passed by parent duplication Identification or import jobs.

## Import Bulk Customer Data

You can use this scheduled process to import customer data. You can use the Data Import UI to check if the data was imported.

### When to Use

This scheduled process is used to import customer accounts data into the application.

### Privileges Required

Verify that you have the following privileges or role:

- Role:

- Master Data Management Application Administrator
- Privileges:
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_BATCH\_DUTY
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_PROCESS\_DUTY

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process on need basis or schedule it for appropriate frequency, such as daily once.
- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Batch ID	Optional	Batch ID of the import flow.	Any	No	N/A
Batch Name	Optional	Name of the batch	Any	No	N/A
Source System	Optional	Source System or Origination System of the batch data.	Any	No	N/A
Batch Object	Optional	Import object of the Batch.	Any	No	N/A

## Why should I use the Maintain Party and Location Current Record Information process?

You can use this Maintain Party and Location Current Record scheduled process to sync worker records in Human Capital Management (HCM) to person parties and to update the current profile record for people, organizations, and locations based on today's date.

Syncing worker records to person party records helps in managing applications such as HR Help Desk, HCM Payroll, Expense, and so on. This scheduled process creates or updates person party records with party usage of HR\_EMPLOYEE or HR\_CONTINGENT\_WORKER that are defined as workers in HCM such as pending worker, employee, contingent worker, nonworkers, and so on. This scheduled process updates person party records with party usage of HR\_EMPLOYEE or HR\_CONTINGENT\_WORKER that are defined in HCM as canceled hire or purged worker.

In HCM, active workers are workers who are continuing in the organization. For example, employee and contingent worker. Future workers are workers who aren't currently part of the organization. For example, pending worker.

This scheduled process works in two modes:

- Normal Mode: All the person types listed in the table below except for employee and contingent worker who were hired in the past or current date are synchronized.
- Full Mode: Employee and contingent worker who were hired in the past or current date are synchronized in addition to the person types processed in the normal mode.

The following table lists the person types that are supported for synchronization in this scheduled process:

**List of person types supported for synchronization in this scheduled process**

Person Type	Hire Date	Sync in Normal Mode	Sync in Full Mode
Employee	Past Date/ Current Date	No	Yes
Employee	Future Date	Yes	Yes
Contingent Worker	Past Date/ Current Date	No	Yes
Contingent Worker	Future Date	Yes	Yes
Pending Worker	Past Date/Current Date /Future Date	Yes	Yes
Nonworker	Past Date/Current Date /Future Date	Yes	Yes
Ex-Employee	Past Date/Current Date /Future Date	Yes	Yes
Ex-Contingent Worker	Past Date/Current Date /Future Date	Yes	Yes
Ex-Pending Worker	Past Date/Current Date /Future Date	Yes	Yes
Ex-Nonworker	Past Date/Current Date /Future Date	Yes	Yes
Purged Worker	Past Date/ Current Date	Yes	Yes

## Prerequisites

This scheduled process syncs active workers only when the profile option Enable Current Active Worker Sync For MPLCRI Job (ORA\_HZ\_ENABLE\_MPLCRI\_ACTIVE\_WORKER) is set to yes (Y), and HRC\_DISABLE\_HCM\_EVENTS\_PROCESSING profile option is set to yes. This setting is named as Full mode. When the HRC\_DISABLE\_HCM\_EVENTS\_PROCESSING profile option is set to yes, Change Person Details events aren't published. Therefore, both the profile options (ORA\_HZ\_ENABLE\_MPLCRI\_ACTIVE\_WORKER and HRC\_DISABLE\_HCM\_EVENTS\_PROCESSING) must be set to yes to avoid creating duplicate person parties while syncing active HCM worker records.

The following table displays the profile options and their values in both the modes:

***This table displays the profile options and their values in both the modes***

Profile Option	Normal Mode	Full Mode
ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER	No	Yes
HRC_DISABLE_HCM_EVENTS_PROCESSING	N	Y

**Note:** Setting the HRC\_DISABLE\_HCM\_EVENTS\_PROCESSING to yes turns off all HCM events. This is very risky because this setting can break business flows that consume HCM events. So, ensure that this profile option is set to yes only during very short periods of time.

This setting is only applicable to active workers and not applicable to other person records such as nonworkers, contingent workers, and so on.

## When to Use

This scheduled process is used to:

- De-normalize the future dated current location profile, party sites, and contact points based on today's date with extended support to future end-dated records.
- Create a party record for a Human Capital Management person record, if the party doesn't exist.
- Synchronize the first name, middle name, the last name, the title of the person, work phone, and work email attributes of the person records.
- When you purge the employee record of a purged worker, run this scheduled process to purge the corresponding person details. This scheduled process end dates the person usage assignment and synchronizes the deleted details of the purged worker.

**Note:** Party usage dates aren't synced during update. In other words, if an employee quits or is terminated (in HCM) and this scheduled process is executed, the party usage assignment isn't end dated. So, if an employee quits or is terminated from work, the person party record is still available. If phone number or email is deleted in HCM and this scheduled process is run, the corresponding person record's phone number or email is deleted.

## Privileges Required

Verify that you have the following privileges or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - When there is a requirement to create or update worker records as person parties to complete business flows such as setting up direct payment methods, then run this scheduled process.
  - The scheduled process can be run when HCM workers are created or updated from HCM interfaces like HDL loader and then to sync workers into person parties.
- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs, and subsequent instances remain in Wait status.
  - Ensure that you don't schedule this process and the Synchronize Person Records process at the same time.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	None
Synchronization Type	Optional	Specify the object to be synchronized. You can specify Worker (HR Persons) or Party and location (De-normalize Parties). If you don't select anything, both objects are synchronized.	<ul style="list-style-type: none"> <li>• Party and location</li> <li>• Worker</li> </ul>	Not applicable	None
Person Type	Optional	Specify the type of person records to be synchronized.	<ul style="list-style-type: none"> <li>• Ex-Nonworker</li> <li>• Nonworker</li> <li>• Employee</li> <li>• Pending Worker</li> <li>• Ex-Employee</li> <li>• Ex-Pending Worker</li> <li>• Ex-Contingent Worker</li> <li>• Contingent Worker</li> </ul>	Synchronization Type must be Worker.	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	None
			<ul style="list-style-type: none"> <li>Purged Worker</li> </ul>		
From Date	Optional	Specify the from date in the date range during which employee records were created or updated.	Select a date.	Synchronization Type must be Worker.	None
To Date	Optional	Specify the to date in the date range during which the employee records were created or updated.	Select a date.	Synchronization Type must be Worker.	None
Person Number	Optional	Specify the person number to be synchronized.	Specify a valid person number.	Synchronization Type must be Worker.	None

## Party Hierarchy Generation

Use the Party Hierarchy Generation scheduled process to execute Flatten Party Hierarchy Rows and Columns.

### When to Use

You must run this scheduled process in the following scenarios:

- If there is a change in tree hierarchy using any channel, such as import, REST, SOAP UI, custom groovy, OIC integration and so on. By default, the tree flattening gets executed automatically.
- After changes are made to the hierarchy, viewing or fetching of hierarchical data, you may run this scheduled process if the hierarchical data appears to be inaccurate.

### Privileges Required

Verify that you have any of the following roles or privileges:

- Roles:
  - ORA\_ZCA\_CUSTOMER\_RELATIONSHIP\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB
  - ORA\_ZCH\_MASTER\_DATA\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB
- Privileges:
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_BATCH\_DUTY
  - ORA\_MANAGE\_TRADING\_COMMUNITY\_IMPORT\_PROCESS\_DUTY

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - On need basis post any changes made to the hierarchical data.
  - Run this scheduled process if hierarchical data appears to be inaccurate.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations	Notes
Hierarchy Type	Mandatory	Specifies the types of hierarchy.	Customer Hierarchy (default) Duns and Bradstreet Hierarchy Partner Hierarchy Trading Community Partner Hierarchy	None	This parameter is List of Values driven.  PARTY_HIERARCHY_TYPE
Hierarchy Name	Optional	Name of a hierarchy.	Any	None	Search and Select
Hierarchy Version	Optional All active versions	Version of the hierarchy.	Default: Active version	None	List of Values
Flattening Method	Mandatory	Method to be applied for flattening.	<ul style="list-style-type: none"> <li>• Incremental Flattening (default)</li> <li>• Force Flattening</li> </ul>	None	List of Values  HZ_TREE_FLATTENING_METHODS

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- You must monitor the status of scheduled process to know that it was successfully completed.
- If the scheduled process fails, it restarts from the beginning.

## Purge Cleanse and Match Batch Data

This scheduled process purges all data quality batches.



## When to Use

This scheduled process purges all data quality batches created from hub to find duplicate or cleanse address data. This scheduled process is triggered when the user selects one or more batches in the duplicate identification or address cleansing UI with status new, completed, error, or completed with error.

## Privileges Required

Verify that you have the following privilege or role:

- Master Data Management Application Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - It's recommended to run this scheduled process on need basis. This process is submitted internally after you select the list of batches to be deleted permanently using the UI. We don't recommend that you schedule this process to run on regular intervals.
- Compatibility:
  - This scheduled process is self-incompatible. No two jobs can be run at the same time. The scheduled process goes into wait state if there is already one running.
  - We recommend that this scheduled process is run in off peak hours when there is very minimal activity.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- The end user must monitor the status of the purge job from schedule process UI using job ID displayed when a batch data is purged.
- Download the scheduled process server logs from schedule process UI to analyze root cause of failure.
- A new scheduled process can be submitted from the schedule process UI. This scheduled process takes batch identifier for an existing cleanse or match batch as parameter that should be deleted, this parameter is optional and isn't required for scheduling the job.

## Purge Data Quality Keys

This scheduled process purges keys.

## When to Use

This scheduled process purges keys generated by the Enterprise Data Quality server for organization or contact entities. This process is triggered when the user selects a cloned inactive match and configuration, and deletes it.

## Privileges Required

Verify that you have the following privilege or role:

- Master Data Management Application Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - It's recommended to run this scheduled process on need basis. This process is submitted internally after you select the list of batches to be deleted permanently using the UI. We don't recommend that you schedule this process to run on regular intervals.
- Compatibility:
  - This scheduled process is self-incompatible. No two jobs can be run at the same time. The scheduled process goes into wait state if there is already one running.
  - We recommend that this scheduled process is run in off peak hours when there are no new accounts or contacts getting created using import, fuse UI and so on.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- You must monitor the schedule process UI to check the status of the purge keys process once created using ID displayed when user selects match configuration for purging.
- Download the scheduled process server logs from schedule process UI to analyze the root cause of failure.
- A new scheduled process can be submitted from schedule process UI. Internally it resumes from the point of failure.

## Purge Duplicate Resolution Data

Use the Purge Duplicate Resolution Data scheduled process to purge duplicate resolution data, such as resolution logs and legacy duplicate resolution batches and requests.

## When to Use

This scheduled process:

- Purges duplicate resolution data based on status and date range.

- You can specify the status of the duplicate resolution requests to be purged, such as duplicate resolution requests in Completed, Error, Pending, New, or Rejected status. You can also specify a date range by specifying the start and an end date to select duplicate resolution requests to be purged.

## Privileges Required

Verify that you have the following privilege or role:

- Privileges
  - ZCH\_REJECT\_TRADING\_COMMUNITY\_DUPLICATE\_RESOLUTION\_REQUEST\_PRIV
- Roles
  - Master Data Management Application Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Compatibility:
  - This scheduled process is incompatible with Request Dispatch job.
  - This scheduled process is self incompatible, which means that multiple purge resolution request jobs can't be run at the same time.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations	Notes
Purge Request Start Date	Mandatory	Specifies the start of the date range when duplicate resolution requests were created.	Any date.	None	None
Purge Request End Date	Mandatory	Specifies the end of the date range when duplicate resolution requests were created.	Any date after the specified start date.	None	None
Resolution Request Status	Optional	The status of the duplicate resolution requests that must be purged.	All, All active, All inactive, Completed, Rejected, Errored, New, Pending	None	<ul style="list-style-type: none"> <li>Here All indicates all supported status codes, inactive and active</li> <li>All Active indicates Pending and New</li> <li>All Inactive indicates Completed, Rejected, and Error</li> </ul>

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations	Notes
Duplicate Identification Batch	Optional	The batch ID of the duplicate resolution requests that must be purged.	Any batch ID	None	None

## Why can't I find inactive records for purging them?

You can purge inactive data or records that you no longer need using this scheduled process. This scheduled process reads the configuration information such as age of inactive record and filter criteria. It then purges parent and child records that meet the filter criteria.

### When to Use

You can use this scheduled process to purge sales contact, sales household, or sales account information that meet the specified filter criteria.

Note that only inactive records that are available in the sales context can be purged. For example, an inactive Partner record can't be purged because Partner isn't related to Sales. Only inactive and related merged sales accounts, sales contacts, and sales households which have no dual usage, or any additional usage (more than one usage) can be purged. Examples of inactive contacts, accounts, or households with dual usage are:

- contact which is also a supplier contact
- sales account which also has billing account usage

The following sales contact record types are supported:

- CONTACT
- ORG\_CONTACT
- CUSTOMER\_CONTACT
- SALES\_PROSPECT
- SALES\_ACCOUNT

The following sales account record types are supported:

- SALES\_PROSPECT
- SALES\_ACCOUNT

Also, along with the purge of the inactive accounts, households, or contacts, references of these purged records, such as identifier or name, are also removed in other applications like opportunities, leads, campaigns, territories, assets, deals, quotes, activities (tasks and appointments), notes, forecasts, business plans, and contracts. For these flows, purged accounts and contacts don't appear on application pages, web service responses, and BI reports.

Merged records can be purged only when the master (survivor) party becomes inactive.

Purge account, contact, and household records in the following situations:

- Purge Inactive Sales Accounts and contacts to comply with General Data Protection Regulations (GDPR).
- Cleanup data because incorrect data was created that's no longer needed.
- In some rare cases, cleanup of data maybe required to improve performance of the application.

## Privileges Required

Verify that you have the following privileges or role:

- Privilege
  - ORA\_ZBS\_SALES\_ADMINISTRATOR\_JOB
- Role
  - Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process on need basis or schedule it for appropriate frequency, such as daily once.
- Execution Time
  - The execution time for a single data record is 1 to 2 minutes.
  - The execution time for a batch job or certain volume of data say 10k is around 1 hours 30 minutes to 2hours.
- Compatibility
  - This scheduled process is incompatible with itself and any other scheduled process.
  - There are no processes that must be run after running this process.

## Parameters

Parameter	Optional or Mandatory	Parameter Values	Description	Special Combinations Required	Notes
Name	Mandatory	Sales Contact Sales Account	Purges inactive records that meet the filter criteria. For more information about specifying the filter criteria, see the Related Topics section.	No	N/A

Parameter	Optional or Mandatory	Parameter Values	Description	Special Combinations Required	Notes
Execution Mode	Mandatory	Regular mode for party purge  Exception mode for party purge clean up	<p>Sales accounts and sales contacts may be referred in other applications. Examples of such references are identifier or name in applications like opportunities, leads, campaigns, territories, and so on.</p> <p>In Regular mode for party purge, the references of inactive party records based on the currently specified filter criteria are removed.</p> <p>In Exception mode for party purge clean up, the references of any party which no longer exists in addition to the references identified in the regular mode are removed.</p> <p>We recommend that you use the Exception mode with caution. Use this mode only when references exists of inactive records in other applications like opportunities, leads, campaigns, territories, assets, deals, quotes, activities (tasks and appointments), notes, forecasts, business plans, and contracts and the corresponding Party Record is purged.</p>	No	N/A

## Troubleshooting Information

You are notified about the scheduled process completion when scheduled process is successful.

### Related Topics

- [Purge Inactive Data](#)

## Populate Location Latitude and Longitude Information

You can set up geocoding for countries to use in applications that use geography data. Geocoding finds the latitude and longitude coordinates from geographic data such as street addresses or Postal Codes.

For example, on a mobile phone you can view which customer and contact addresses are close to your current location. The application integrates the geocoding with eLocation, which is a geocoding service provided by Oracle.

Note that latitude and longitude are populated only for active locations.

### When to Use

You can use this scheduled process to populate latitude and longitude information for addresses in the `HZ_LOCATIONS` table.

**Note:** Geocoding can be run only on verified addresses. Ensure that the addresses for which this scheduled processes must be run are verified using the eLocation service.

Before running this scheduled process, enable geocoding using the Manage Geographies tasks. For more information about enabling geocoding, see the Set Up Geocoding topic in the Related Topics section. After you enable geocoding, you run this scheduled process at regular time intervals so that newly created or updated locations are selected and geocoded.

The following location attributes are used to populate latitude and longitude values:

- ADDRESS1
- ADDRESS2
- ADDRESS3
- ADDRESS4
- CITY
- STATE / PROVINCE
- POSTAL\_CODE
- COUNTRY

The profile value of the Geocoding Subprocess Batch Size (`HZ_GEOCODING_BATCH_SIZE`) profile option impacts this scheduled process. Use this profile option to specify the maximum number of locations that each batch subprocess can handle for geocoding.

### Privileges Required

Verify that you have the following privilege or role:

- Role:
  - Application Implementation Consultant
- Privilege:
  - Run Geocode Loader

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - The schedule frequency depends on the number of addresses that are yet to be geocoded. In general, you can run this process as needed or schedule it to run once a week.
  - If the number of addresses to be geocoded in the application is less than or equal to 10,000, then schedule the process to run once or two times per day. If you don't want to schedule it, you can manually submit this schedule process when required. If the number of unverified addresses to be processed exceeds 10,000, new addresses aren't processed.
  - If many addresses are imported on certain days, then schedule this process to run more frequently in a day with a batch size of 50. For example, you can run the scheduled process every 15 minutes on such days or manually submit it multiple times after import is complete with a batch size of 50.
  - After all the locations are geocoded, newly submitted geocoding processes don't spawn any sub-processes.
  - Schedule this process with date range and regenerate the geocode using one of the following modes:
    - Create a new scheduled process every month or every 6 months. That is create a new schedule process every month or every 6 months, with start date as first of month and end date as first of the following month or the seventh month.
    - Create new schedule every year with start date as 1st of the year and end date as last day of year. This however means there is higher probability than first option of unverified addresses count reaching more than 10k and hence geocoding will not process any new addresses.
  - The best practice is to keep track of the From Location ID and To Location ID in the log file of this scheduled process. If these values remain the same across several scheduled runs, then you must change the start date to avoid unverified addresses being picked up for reprocessing.
- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

**Note:** For more information about the steps to be performed before running this scheduled process, see the Related Topics section.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Country Code	Optional	Country Code of locations for which latitude and longitude are to be populated.	Example: IN	None	N/A
Start Date	Optional	Specifies the beginning of the date range since the last update.	Date	Format : mm/dd/yy Example: 12/31/19 Start Date must be earlier than End Date	N/A



Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
End Date	Optional	Specifies the end of the date range since the last update.	Date	Format : mm/dd/yy Example: 12/31/19 End Date must be later than Start Date	N/A
Regenerate Geocode	Optional	Specifies if coordinates must be regenerated for existing ones. If this parameter is set to Y (Yes), the latitude and the longitude for all locations irrespective of whether the data already exists is repopulated.	Y N	No	N/A
Batch Size	Optional	Specifies the number of locations to be processed in a single sub-process.	Numeric Value	Maximum value 50	N/A

**Note:** All the parameters are optional. If this scheduled process is run without any parameters, the process picks all addresses of countries for which geocoding is enabled. This scheduled process can populate a maximum of 50 address locations. If the total number of addresses to be geocoded are more than 10,000, you may have to run this scheduled process many times with each batch of size 50 addresses. Only active locations are considered for latitude and longitude population. This scheduled process populates latitude and longitude values in the `HZ_LOCATIONS` table. This scheduled process continues to pickup already processed addresses for which the latitude or longitude parameters are null. Use the following service to validate the result: Service: <http://elocation.oracle.com/geocoder/xmlreq.html> Sample XML:

```
<?xml version="1.0" standalone="yes" ?>
<geocode_request vendor="elocation">
<address_list>
<input_location id ="100000000387780"> <input_address
match_mode="default"><unformatted country="US" ><address_line value="500
oracle pky"/><address_line value="Redwood City"/><address_line
value="CA"/></unformatted></input_address></input_location>
<input_location id ="100000000415138"> <input_address
match_mode="default"><unformatted country="DE" ><address_line
value="Kroppacherstr. 15"/><address_line value="Ostrau OT
Schrebitz"/><address_line
value="4749"/></unformatted></input_address></input_location>
</address_list>
</geocode_request>
```

## Troubleshooting Information

- The log file contains the count of the number of locations that were picked for geocoding and other details of the scheduled process. Go to the scheduled processes UI and drill down on the job to click and open the log file.

### Related Topics

- [Set Up Geocoding](#)

## How do I refresh denormalized data for account hierarchy?

Use the Refresh Denormalized Data for Account Hierarchy scheduled process to refresh the denormalized data for the account hierarchy.

This scheduled process is used to update and organize the information about accounts

## When to Use

This schedule process:

- This scheduled process impacts hierarchy data.
- You won't be able to get the hierarchy data if you don't run this scheduled process. The denormalized table will be blank.

## Privileges Required

Verify that you have the following privilege:

- HZ\_RUN\_TRADING\_COMMUNITY\_ACCOUNT\_HIERARCHY\_CHANGE\_IDENTIFICATION\_PRIV

Verify that you have the following roles:

- Sales Admin

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - On regular intervals depending on how frequently the hierarchy data is getting changed or manipulated.
  - After an upgrade, a full refresh should only be performed once. Rerun requests should only be made when data has been added to or deleted from the hierarchy. Depending on how frequently the hierarchy is altered, you must schedule this job and choose the frequency. This scheduled process does a full refresh for the first time. In the subsequent runs, it syncs only impacted hierarchies.
- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

## Parameters

You might need to specify some of the following parameters:

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Full Refresh	Mandatory  Default value: No	After an upgrade, a full refresh should only be performed once. Rerun requests should only be made when data has been added to or deleted from the hierarchy. Depending on how frequently the hierarchy is altered, you must schedule this job and choose the frequency. A job will behave as a Full Refresh if it is run in this mode for the first time; otherwise, the job will sync only impacted nodes.	No	Under Advanced Options, you need to expose a parameter for Full Refresh under Parameters tab which is by default selected as "No"	N/A

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Check the log or output file.
- If the scheduled process didn't run successfully, you can re-submit the process after rectifying the error.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.
- You can create a notification schedule. To do this: Click **Advanced Options** and go to the **Notification** tab on the **Process Details** page.

## How do I generate the resource reporting hierarchy?

You can use this scheduled process to generate the resource reporting hierarchy for a given internal resource organization hierarchy, a sales, or a marketing organization hierarchy. This scheduled process also updates the reporting hierarchy when changes occur in the organization hierarchy.

You can run this scheduled process when new resources are created in Import Management using Resource User.

## When to Use

This scheduled process:

- Updates the reporting hierarchy in accordance to the changes in internal resource or partner organization hierarchy. This scheduled process updates the reporting hierarchy in accordance with the changes in internal resource hierarchy. The resource's reporting manager isn't updated unless you run this scheduled process.
- Must be run after you make any changes to the hierarchy such as changing the manager or the organization.

## Privileges Required

Verify that you have the following privilege or roles:

- Roles:
  - Application Implementation Consultant
  - Master Data Management Application Administrator
- Privilege:
  - Run Trading Community Resource Reporting Hierarchy Generation

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process when new resources are created in Import Management using Resource User.
  - You can run this scheduled process when the same resource is visible multiple times in Team Members tab of Opportunity.
  - You can run this scheduled process as needed or at appropriate intervals, such as daily.
- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Tree Structure Code	Mandatory	Specifies the type of resource hierarchy.	RESOURCE_ORG_TREE_STRUCTURE PARTNER_ORG_TREE_STRUCTURE	None	This parameter is List of Values driven.  Selecting RESOURCE_ORG_TREE_STRUCTURE builds the internal resource hierarchy.

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
					Selecting PARTNER_ORG_TREE_STRUCTURE builds the corresponding partner tree.
Tree Code	Mandatory	Specifies the tree code.	GLOBAL_SALES_MARKETING	None	This parameter is List of Values driven.  Select 'GLOBAL_SALES_MARKETING' for internal resource hierarchy.  Select corresponding tree code for Partner Hierarchy.
Tree Version ID	Mandatory	Specifies the version ID of the Tree.	Any	None	This parameter is List of Values driven.  Select corresponding Tree Version ID for the hierarchy that must be re-generated.

## How do I synchronize financials accounts and contacts with CX Cloud?

Customer accounts and contacts in Oracle Financials Cloud are an integral part of the billing process. Users create or import account and contact records in Financials Cloud.

After they're in Financial Cloud, a synchronization process synchronizes the records to Oracle CX Cloud, thus making sales representatives aware of the details of sales accounts that exist in Financials Cloud. Without this synchronization, sales representatives may not know when their sales accounts become actual billing accounts.

### When to Use

After users create customers in Financials Cloud, use a scheduled process to sync the records from Financials to CX Cloud.

Users can find and create customers in the Manage Customers UI in Financials Cloud. New organization customers are created by providing the customer name, address details, and the address purpose, such as sell-to or bill-to. Similarly, users can update existing customers in the same UI.

After a customer is created or updated, you run the process to sync the records, which includes customers and contacts.

### Privileges Required

Verify that you have the following privileges or roles:

Role:

- Sales Administrator

Privileges:

- ZCM\_CREATE\_SALES\_PARTY\_CONTACT\_PRIV
- ZCM\_CREATE\_SALES\_ORGANIZATION\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can execute or schedule this scheduled process when needed.
- Compatibility:
  - This scheduled process is self-incompatible. No two jobs can be run at the same time. The scheduled process goes into wait state if there is already one running.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- You must monitor the schedule process UI to check the status of the synchronization.
- Note any errors that indicate any failures.

## How do I synchronize the GUID of users?

You can use this scheduled process to synchronize the user GUID of users including Employees, Contingent Workers, and Partner Contacts in CRM database.

## When to Use

This scheduled process is used to:

- Update the user GUID in CRM database for users.
- Remove the user GUID from CRM database for inactive parties.
- Remove invalid user GUID from CRM database that doesn't exist in HCM database.

## Privileges Required

Verify that you have the following privileges or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - You can run this scheduled process when some users aren't properly connected to Person Parties.
  - You can run this scheduled process on ad hoc basis or schedule it for appropriate frequency, such as daily once.
- Compatibility
  - No self-incompatibility defined.

## Parameters

None.

# How do I validate geographies of addresses against master geographies and generate naming references?

This scheduled process helps you validate an address against master geography data and generates geography naming references.

Geography Name Referencing (GNR) process validates address elements in location tables, such as HZ\_LOCATIONS, against the master geography data.

## When to Use

This scheduled process validates address data against master geographies. This scheduled process checks whether geography elements of an address like state, city, postal code, are valid as per master geography data. It also stores Geography Name Referencing information for the address. Note that geography validation isn't the same as address verification. *Address Verification* depends upon Oracle or any third-party address verification services for verifying addresses.

You can run this scheduled process for the following reasons:

- When you must generate or refresh the geography naming references data for a location.
- After creating new locations or updating existing locations using import and when geography naming references generation at the time of creation is turned off.
- When the master geography hierarchy has changed after the geography naming references data is computed and we require to re-compute the geography naming references data.

- We recommend that the profile option value of the *HZ\_POST\_IMPORT\_GNR\_INVOKE profile option* is set to N. When this profile option value is set to N, the Validate Geographies of Addresses Against Master Geographies scheduled process isn't invoked after every import following bulk uploads. Instead, you must schedule this scheduled process every week during off peak hours. This helps improve the geography data import performance.
- Schedule this process after loading Persons or Employees in HCM.

The time taken to complete one instance of this scheduled process (GNR job) depends upon the following factors:

- The number of locations or addresses in the application
- The number of validation levels set for a given country
- The number of geographies for the given country

To process a large volume of addresses for a country using this scheduled process, fine tune the following profile options:

- HZ\_GNR\_NUM\_OF\_WORKERS: By default, the value of this profile option is 1. So only one worker job is created. Increase this number based on the number of jobs you want to use.
- HZ\_GNR\_COMMIT\_SIZE: By default, the value of this profile option is 1000 records. Increase this number based on the number of records you want to process.

## Privileges Required

Verify that you have the following privilege or role:

- Role:
  - Application Implementation Consultant
- Privilege:
  - Run Trading Community Geography Name Referencing Maintenance

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Run this scheduled process whenever the geography naming references data for a location is generated or refreshed.
- Compatibility:
  - This process is self-incompatible and also incompatible with the Group Territory Geographies process.
  - If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

## Parameters



Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Location Table Name	Mandatory	Specifies the table name containing the address records that you want to process.	HZ_LOCATIONS PER_ADDRESSES_F	None	The PER_ADDRESSES_F value works only for tax validation and not for address validation. For example, if you are using this GNR process in HCM and you select the PER_ADDRESSES_F option, then this scheduled processes can be used for tax purposes but not for validating employee addresses.
Run Type	Mandatory	Specifies the data set to be processed. Specify if you want to process all records, only records that previously resulted in error, or only new records that were never processed. The choice to process all records can take considerable amount of time to complete. In taxation applications, an upgrade parameter is available, if the application is installed at the time of upgrade. If you already processed all records or upgraded recently, you may select only the New or the Error parameter.	ALL ERROR NEW	None	ALL-Validates all Locations  Error-Re-validates erroneous records  NEW-Validates new locations
Usage Code	Optional	Specifies the validation usage code. This parameter specifies whether the GEOGRAPHY or TAX validation must be run. Specify to run the program for either the tax or geography validation usage. The program provides results that correspond to validation rules associated with the selected usage.	GEOGRAPHY TAX	None	Use GEOGRAPHY for address validation.

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Country Code	Optional	Specifies the ISO Country Code for which the process is run. Enter the country for which addresses must be processed.	Example: US	None	N/A
From Location ID	Optional	Specifies the beginning Location ID from which validation should be run	Numeric Value	From Location ID should be less than To Location ID	N/A
To Location ID	Optional	Specifies the ending Location ID till which validation should be run	Numeric Value	To Location ID should be greater than From Location ID	N/A
Start Date	Optional	Specifies the begin Location Effective Start Date	Date	Format : YYYY/MM/DD Example: 2019/12/24 Start Date should be lower than End Date	N/A
End Date	Optional	Specifies the begin Location Effective End Date	Date	Format : YYYY/MM/DD Example: 2019/12/24 End Date should be higher than Start Date	N/A

Geography Name Referencing (GNR) records are created for addresses based on the country structure for a particular country and the validations defined on that structure. The following table displays the relationship between validations defined and the creation of GNR records. It also shows how the records change when correct or incorrect data are provided as values for addresses.

Use Case	Address Validations Defined	Address	GNR Records	GNR Map Status
Correct data with no validations	None	Country: US State: CA City: Redwood City Postal Code: 94065	GNR record created for country	Success

Use Case	Address Validations Defined	Address	GNR Records	GNR Map Status
Correct data with validations turned on for all levels	Country: US Validations Defined for: State, County, City, Postal Code	Country: US State: CA City: Redwood City Postal Code :94065	GNR Records created for country, state, county,city and postal code	Success
Correct date with validation defined only for last level	Country: US Validations Defined for: Postal Code	Country: US State: CA City: Redwood City Postal Code: 94065	GNR Records created for country, state, county,city and postal code	Success
Correct date with validation defined only for last level. Postal Code is unique and falls within single city in the county.	Country: US Validations Defined for: Postal Code	Country: US State: CA City: Postal Code: 94065	GNR Records created for country, state, county,city and postal code.	Success
Correct data with validation on middle level	Country: US Validations Defined for: City	Country: US State: CA City: Redwood City Postal Code: 94065	GNR Records created for country, state, county,city and postal code	Success
Correct data with validation on middle level. Postal Code is unique and falls within single city in the county.	Country: US Validations Defined for: City	Country: US State: CA City: <NULL> Postal Code: 94065	GNR Records created for country, state, county,city and postal code .	Success
Incorrect data for last level with validation on middle level	Country: US Validations Defined for: City	Country: US State: NY	GNR Records created for country, state, county and city	Success

Use Case	Address Validations Defined	Address	GNR Records	GNR Map Status
		City: New York  Postal Code: 1111		
Incorrect data for last levels with validation on middle level	Country: US  Validations Defined for: State	Country: US  State: CA  City: Abc  Postal Code: 94065	GNR Records created for country and state	Success
Incorrect data for last levels with validation on middle level	Country: US  Validations Defined for: State	Country: US  State: CA  City: Redwood City  Postal Code: 111	GNR Records created for country, state, county and city	Success
Incorrect data for last level with validations turned on for all levels	Country: US  Validations Defined for: State, County, City, Postal Code	Country: US  State: CA  City: Redwood City  Postal Code: 10027  (assume 10027 postal code does not exist)	GNR Records created for:  Country  state  county  city	Error
Incorrect data for middle level followed by correct data on subsequent levels with validations turned on for all levels	Country: US  Validations Defined for: State, County, City, Postal Code	Country: US  State: CA  City: Xyz  Postal Code: 94065	GNR Records created for:  Country  State	Error
Incorrect data for middle level with validation defined only for last level	Country: US  Validations Defined for: Postal Code	Country: US  State: CA  City: Abc	GNR Records created for country and state	Error

Use Case	Address Validations Defined	Address	GNR Records	GNR Map Status
		Postal Code: 94065		
Correct data with validation defined only for last level. Same Postal Code is in two cities (which are in the same county).	Country: US  Validations Defined for: Postal Code	Country: US  State: CA  City: <NULL>  Postal Code: 94065	GNR Records created for Country, State, County	Error

### Related Topics

- [Address Validation using Geography Naming Reference \(GNR\) Report](#)
- [How do I manage geography validation?](#)
- [Setting Up Geography Validation](#)
- [How can I save an address that didn't pass geography validation?](#)

## Forecasting

### Check Due Date

Use the check due date scheduled process to archive forecast that are now past their due dates and activate the next scheduled forecast. As an administrator, I want to be able to check if the due date has passed for the current forecast.

If the due date has passed for the current forecast, the check due date job will do the following:

Mark current forecast as Past Forecast such that it shows as a completed forecast and locks the participants under this forecast.

### When to Use

Forecast Autopilot can manage the submission and schedule for Check Due Date appropriately. We recommend that you enable autopilot to automatically manage background forecasting processes.

### Privileges Required

Verify that you have the following privilege or role:

- Role
  - Sales Administrator
- Privilege

- ZSF\_DEFINE\_SALES\_FORECAST\_PRIV
- ZSF\_MANAGE\_SALES\_FORECAST\_PARTICIPANT\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Run this process once daily at 00:00:00 am to check if the due date has passed for the current forecast.
- Execution Time:
  - Typically less than two minutes.
- Compatibility:
  - There should be only one instance of the job running at any one time and there is no current functional need to be able to run multiple instances of this process at the same time.

## Parameters

None.

## Troubleshooting Information

- You can view the status of the refresh forecast operation on the scheduled processes UI.
- The validation errors and warning messages that prevented the refresh forecast are displayed in the error log.
- Any interactive warning validations are NOT performed.
- When the program is submitted, you can Resubmit, Put on Hold, Cancel Process, Release Process as provided by the scheduled processes UI.

### Related Topics

- [Forecast Processes](#)

## Forecast Autopilot

Use the Forecast Autopilot scheduled process to automatically manage all background forecasting processes. Forecast Autopilot will automatically determine when all other forecasting jobs need to be scheduled.

As an administrator, I want to be able to schedule the required processes for forecasting and record when each process is run, along with the status. Forecast Autopilot generates these processes and scheduled times:

- Check Due Date: This short process archives forecasts that are now past their due dates and activates the next scheduled forecast. It runs once a day.
- Refresh Forecast: This process updates current and future forecasts using the latest opportunity data. It also updates the forecast territory hierarchy from the latest active territories. Between the territory freeze date and

the forecast due date, the forecast territory hierarchy remains frozen. This process runs one day before the territory freeze date for each forecast period.

- Refresh Revenue Metrics: This process calculates the pipeline metric and closed revenue metric. It refreshes the pipeline metrics visible to the manager and runs every hour.
- Compress Forecast Metrics: This process reduces space usage and improves performance by compressing calculated metrics. It runs every hour.

## When to Use

When you enable forecasting, the Forecast Autopilot process is scheduled to run every hour. If you change the schedules for the processes, then the Forecast Autopilot runs as frequently as the process with the most frequent schedule.

## Privileges Required

Verify that you have the following privilege or role:

- Role
  - Sales Administrator
- Privilege
  - ZSF\_DEFINE\_SALES\_FORECAST\_PRIV
  - ZSF\_MANAGE\_SALES\_FORECAST\_PARTICIPANT\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - When you enable forecasting, the Forecast Autopilot process is scheduled to run every hour.
- Execution Time:
  - Time varies based on the process being run.
- Compatibility:
  - Only one instance of the job must run at a time and there is no current functional need to be able to run multiple instances of this process at the same time.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Diagnostic Parameters	Optional	<ul style="list-style-type: none"> <li>• To enable autopilot on an environment where it's disabled or never enabled, one</li> </ul>	<ul style="list-style-type: none"> <li>• setup_auto_pilot=ON</li> <li>• setup_auto_pilot=OFF</li> </ul>	None	N/A

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
		needs to submit autopilot with the following diagnostic parameter: setup_auto_pilot=ON <ul style="list-style-type: none"> <li>If you want to disable the Forecast Autopilot process, then enter setup_auto_pilot=OFF. With Forecast Autopilot disabled, you must schedule each process.</li> </ul>			

## Troubleshooting Information

- You can view the status of the refresh forecast operation on the scheduled processes UI.
- The validation errors and warning messages that prevented the refresh forecast are displayed in the error log.
- Any interactive warning validations are NOT performed.
- When the program is submitted, you can Resubmit, Put on Hold, Cancel Process, Release Process as provided by the scheduled processes UI.

### Related Topics

- [Forecast Processes](#)

## Refresh Forecast

Use the Refresh Forecast scheduled process to update current and future forecasts using the latest opportunity data. It also updates the forecast territory hierarchy from the latest active territories and product hierarchy changes.

As an administrator, you can synchronize forecast data with their respective transactions, this would include creating new forecast items for transactions that meet forecast criteria periods, updating existing forecast items and removing forecast items which no longer meet forecast criteria.

Apart from synchronizing forecast, this scheduled process is also responsible for up taking the territory and product hierarchy changes. The process doesn't synchronize the territory hierarchy changes being made between the territory freeze date and the forecast due date during which the forecast territory hierarchy remains frozen.



## When to Use

Forecast Autopilot can manage the submission and schedule for Refresh Forecast appropriately. It is recommended to enable autopilot to automatically manage background forecasting processes.

## Privileges Required

Verify that you have the following privilege or role:

- Role
  - Sales Administrator
- Privilege
  - ZSF\_DEFINE\_SALES\_FORECAST\_PRIV
  - ZSF\_MANAGE\_SALES\_FORECAST\_PARTICIPANT\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process when required.
  - You can run this scheduled process before the territory freeze date for each forecast period to synchronize the forecasting data as per the current territory hierarchy
- Execution Time:
  - Time varies based on the number of opportunity and territory changes.
- Compatibility:
  - There should be only one instance of the job running at any one time and there is no current functional need to be able to run multiple instances of this process at the same time.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Refresh Forecast Items Only	Optional	<ul style="list-style-type: none"> <li>• Yes - Specifies whether to consider only the changed revenue items prior to the last refresh. Or all revenues items having effective date greater than start date of Un submitted forecast for synchronization</li> </ul>	Yes No	None	

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
		<ul style="list-style-type: none"> <li>No or Empty - Default execution, which includes territory and product hierarchy synchronization in addition to revenue items.</li> </ul>			
Diagnostic Parameters	Optional	Don't provide any value. This is used for diagnostic.	N/A	None	N/A

## Troubleshooting Information

- You can view the status of the refresh forecast operation on the scheduled processes UI.
- The validation errors and warning messages that prevented the refresh forecast are displayed in the error log.
- Any interactive warning validations aren't performed.
- When the program is submitted, you can Resubmit, Put on Hold, Cancel Process, Release Process as provided by the scheduled processes UI.

### Related Topics

- [Forecast Processes](#)

# Knowledge Management

## Knowledge Article View Aggregation

Use this scheduled process to aggregate data on the number of articles that have been viewed.

This scheduled process takes data from action capture tables, moves them to analytics staging tables for processing, and writes them to analytics aggregate tables. The end result is that reporting tables named `cso_article_stats` and `cso_popular_answers` are populated.

### When to Use

This process can be run anytime after you have configured the knowledge management functional area. This process has no dependencies on other processes.

## Privileges Required

Verify that you have the following privilege or role:

- Role
  - Knowledge Manager
- Privilege
  - `SVC_SCHEDULE_SERVICE_JOBS_PRIV`

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - We recommend that you schedule this process to run automatically every hour by setting the frequency as Hourly/Minute, and the time between runs as one hour. Once started, this process runs continuously and aggregates new data every hour.
- Execution Time:
  - Within one hour
- Compatibility:
  - This process depends on the Service process, Refresh Service Categories for Reporting, and on the Analytics process, Refresh Denormalized Time Dimension Table for BI. For more information about Refresh Service Categories for Reporting, see the Refresh Service Categories for Reporting topic in the Service Request Management. For more information about Refresh Denormalized Time Dimension Table for BI, see the Related Topics section.
  - You can't run more than one instance of this scheduled process at the same time. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

## Parameters

None.

## Troubleshooting Information

You can use the scheduled process page or logs to verify the status of the scheduled process.

*Related Topics*

## Knowledge Content Batch Process

You can use this scheduled process to update Knowledge categories and products to reflect recent changes to Service and Human Capital Management products and categories.

## When to Use

This scheduled process must be run periodically whenever a customer implements the Knowledge Management functional area. This scheduled process ensures that the Knowledge Management functional area uses current product and category information.

## Privileges Required

Verify that you have the following privilege or role:

- Role
  - Knowledge Manager
- Privilege
  - `SVC_SCHEDULE_SERVICE_JOBS_PRIV`

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - Schedule the job to run once daily.
  - You can schedule this job at any time of the day.
- Execution Time:
  - The execution time depends on the number of changes made to categories and products since the previous execution.
- Compatibility:
  - You can't run this scheduled process while another instance of the scheduled process is running.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- You can use the notification settings of the scheduled process to be notified for any combination of error, warning, or success statuses.
- If this scheduled process fails, you can restart the process without any additional cleanup activity.

## Knowledge Search Aggregation

Use this scheduled process to aggregate data on the number of knowledge base searches that users have performed.

This scheduled process takes data from action capture tables, moves them to analytics staging tables for processing, and writes them to analytics aggregate tables. The process updates the `csso_search_stats`, `csso_rpt_questions`, `csso_rpt_clickthroughs` and `csso_search_tokens` reporting tables with the aggregated data.

## When to Use

You can run this process any time after you configure the knowledge management functional area.

## Privileges Required

Verify that you have the following privileges:

- `SVC_SCHEDULE_SERVICE_JOBS_PRIV`

Verify that you have the following roles:

- Knowledge Manager role

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - We recommend that you schedule this process to run automatically every hour by setting the frequency as Hourly/Minute, and the time between runs as one hour. Once started, this process runs continuously and aggregates new data every hour.
- Execution Time:
  - Within one hour
- Compatibility:
  - This process depends on the Service process, Refresh Service Categories for Reporting, and on the Analytics process, Refresh Denormalized Time Dimension Table for BI. For more information about Refresh Service Categories for Reporting, see the Refresh Service Categories for Reporting topic in the Service Request Management section. For more information about Refresh Denormalized Time Dimension Table for BI, see the Related Topics section.
  - You can't run more than one instance of this scheduled process at the same time. If you submit multiple instances, the first instance runs, and subsequent instances are blocked until it completes.

## Parameters

None.

## Troubleshooting Information

You can use the scheduled process page or logs to check the status of this process.

*Related Topics*

## Knowledge Search Batch Process

You can use this scheduled process to update Knowledge search to reflect any changes to knowledge base content.

This scheduled process updates the Knowledge search index so that new, modified, or deleted knowledge articles or web content is available to Knowledge search users.

### When to Use

This scheduled process must be scheduled to run periodically whenever a customer implements the Knowledge Management functional area. This scheduled process must be run so that the latest changes to the knowledge articles are available to Knowledge users.

### Privileges Required

Verify that you have the following privilege or role:

- Role
  - Knowledge Manager
- Privilege
  - `SVC_SCHEDULE_SERVICE_JOBS_PRIV`

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - The job should be scheduled to run every fifteen minutes
  - We have no recommended time to schedule the process
- Execution Time
  - The execution time for single data record is 5 minutes
  - The execution time of the scheduled process depends on the amount of changed knowledge articles and the size of the product tree. The execution time ranges from 5 minutes to 2 hours.
- Compatibility:
  - Knowledge Content Batch Process must be run before Knowledge Search Batch Process for product sync.
  - There may be potential impact on the server performance while running this scheduled process.
  - Running multiple instances of this scheduled process in parallel may create issues.

### Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- If the scheduled process isn't successful, then the `xtext` process resumes and continues to run.
- You can restart the scheduled process if it failed in the initial run. No clean up is required before the restart.
- You can go to the Search Dictionary Manage page and click the Content Processing tab to check the status of the scheduled process. You can verify the results from the Search results by asking a question from My Knowledge page.

# Marketing Campaigns and Leads

## Populate Lead Latitude and Longitude Information

Geocoding finds the latitude and longitude coordinates from geographic data such as street addresses or Postal Codes.

For example, on a mobile phone you can view which customer and contact addresses are close to your current location. The application integrates the geocoding with eLocation, which is a geocoding service provided by Oracle.

### When to Use

You can use this scheduled process to populate latitude and longitude information for addresses in the MKL\_LM\_LEADS table.

### Privileges Required

Verify that you have the following privilege or role:

- Role:
  - Application Implementation Consultant

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - The schedule frequency depends on the number of addresses that are yet to be geocoded. In general, you can run this process as needed or schedule it to run once a week.
  - If the number of addresses to be geocoded in the application is less than or equal to 10,000, then schedule the process to run once or two times per day. If you don't want to schedule it, you can manually submit this schedule process when required.
  - If many addresses are imported on certain days, then schedule this process to run more frequently in a day. For example, you can run the scheduled process every 15 minutes on such days or manually submit it multiple times after import is complete.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Country Code	Optional	Country Code of locations for which latitude and longitude are to be populated.	Example: IN	None	N/A
Start Date	Optional	Specifies the begin Location Effective Start Date.	Date Format : mm/dd/yy Example: 12/31/19	Start Date must be earlier than End Date	N/A
End Date	Optional	Specifies the begin Location Effective End Date.	Date Format : mm/dd/yy Example: 12/31/19	End Date must be later than Start Date	N/A
Regenerate Geocode	Optional	Specifies if coordinates must be regenerated for existing ones.	Y or N	No	N/A
Batch Size	Optional	Specifies the number of locations to be processed in a single sub-process.	Numeric Value	Maximum value 1000	N/A

**Note:** All the parameters are optional. If this scheduled process is run without any parameters, the process picks all addresses of countries for which geocoding is enabled. This scheduled process can populate a maximum of 10,000 address locations. If the total number of addresses to be geocoded are more than 10,000, you may have to run this scheduled process many times with each batch of size 1000 addresses. This scheduled process populates Latitude and Longitude values in the MKL\_LM\_LEADS table. This scheduled process continues to pickup already processed addresses for which the latitude or longitude parameters are null.

## Troubleshooting Information

- The log file contains the count of the number of locations that were picked for geocoding and other details of the scheduled process. Go to the scheduled processes UI and drill down on the job to click and open the log file.



# Microsoft Office 365

## Microsoft 365 Instant Sync

Use this scheduled process to synchronize CX Sales activities with Microsoft 365 instantly.

### When to Use

This sync process needs to be scheduled for any deployment that has users trying to share meetings from Microsoft Outlook to CX. Also, this sync process is needed when users are sharing emails that they're still composing.

### Privileges Required

Verify that you have the following privilege or role:

Role

- Sales Administrator

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - As a starting point, set up the instant sync process to run every hour
  - When needed, the administrator can also run this process in an ad-hoc basis.
- Execution Time:
  - Execution times can vary significantly depending on the number of records that need to be synced. In most cases, the process should complete in less than 30 minutes.
- Compatibility:
  - Ideally, you will set up the frequency of this sync process such that it has sufficient time to finish before another one starts. In many cases, a 1 hour frequency should suffice.

### Parameters

None.

### Troubleshooting Information

- Administrators will see in the Scheduled Process page if the sync process failed.
- If this sync process doesn't complete successfully, you may not see your meetings and Emails from Outlook get synced into CX.

- Verification that the sync process ran successfully can be done by creating a meeting in Outlook and sharing that meeting to CX. An equivalent appointment in CX will be created after the instant sync process completes.

#### Related Topics

- [Synchronize Data Between CX Sales and Microsoft 365](#)

## Microsoft 365 Standard Sync

Use this scheduled process to synchronize the contacts and activities between Microsoft 365 and your sales application.

### When to Use

This sync process needs to be scheduled for any deployment that's sharing meetings into CX. Changes that are made to the original meeting in Microsoft Outlook are synchronized into CX using the standard sync. Also, tasks and contacts created in CX can be synced into Outlook. This is handled by the standard sync.

### Privileges Required

Verify that you have the following privilege or role:

Role

- Sales Administrator

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - As a starting point, set up the standard sync process to run every four hours.
  - When needed, the administrator can also run this process on need basis.
- Execution Time:
  - Execution times can vary significantly depending on the number of records that need to be synced. As a data point, we have seen in some environments that the standard sync process can take an hour to complete when processing records for 1500 registered users.
- Compatibility:
  - Ideally, you will set up the frequency of this sync process such that it has sufficient time to finish before another one starts. Monitor how long it takes to complete in your environment and adjust accordingly.

### Parameters

None.

## Troubleshooting Information

- Administrators will see in the Scheduled Process page if the sync process failed.
- If this sync process doesn't complete successfully, you may not see the changes you make to Microsoft Outlook meetings get synced into CX.
- Verification that the sync process ran successfully can be done by editing a previously shared meeting in Microsoft Outlook. Those changes should reflect into the equivalent appointment in CX once standard sync completes.

### Related Topics

- [Synchronize Data Between CX Sales and Microsoft 365](#)

## Microsoft 365 Token Refresh

Use this scheduled process to keep the users' Oracle tokens active all the time.

### When to Use

This sync process needs to be scheduled for any deployment that has users using the Microsoft 365 add-in, is sharing emails or meetings into CX or is expecting tasks or contacts created in CX to be synced back into Microsoft Outlook.

### Privileges Required

Verify that you have the following privilege or role:

#### Role

- Sales Administrator

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - As a starting point, set up the standard sync process to run every three hours.
  - The administrator can also run this process on need basis.
- Execution Time:
  - In most environments, this process should complete in less than an hour.
- Compatibility:
  - Ideally, you can set up the frequency of this sync process such that it has sufficient time to finish before another one starts. Monitor how long it takes to complete in your environment and adjust accordingly.

## Parameters

None.

## Troubleshooting Information

- If the sync process failed, administrators can view the failed scheduled process on the scheduled process page.
- If this sync process doesn't complete successfully, users are displayed as unauthorized users in the Microsoft 365 sync monitor.

### Related Topics

- [Synchronize Data Between CX Sales and Microsoft 365](#)

## Microsoft Exchange Email Sync Job

Use the Microsoft Exchange Email Sync Job scheduled process to synchronize Microsoft Exchange emails to CX Sales.

## When to Use

This scheduled process:

- Is used when Exchange Email Integration is enabled for Digital Sales.
- Is required to support Exchange email integration feature.
- Is required to run when the value of the profile option `ORA_ZCA_DS_EMAIL_OPTIONS` is set to MS Exchange with Redwood Compose UX, MExchange Office365 UI, or MS Exchange with OS Native UI. The following are the profile values:
  - Oracle Email (default)
  - MS Exchange Office 365 UI
  - MS Exchange with Redwood Compose UX

## Privileges Required

Verify that you have the following privileges:

- `ORA_ZBS_SALES_ADMINISTRATOR_JOB`
- `ZOE_DEFINE_OUTLOOK_INTEGRATION_PRIV`

Verify that you have the following roles:

- Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

#### Recommended Frequency:

- Run this scheduled process at regular intervals, for example, every few minutes depending on the load.

#### Execution Time:

- This scheduled process takes about 30 seconds for 60 emails.

#### Compatibility:

- There are no dependent scheduled processes that should be taken into consideration before or after running this scheduled process.
- Running of this scheduled process has no particular impact on the server performance.
- This scheduled process is incompatible with itself so can't run multiple instances of this process at the same time.

## Parameters

None.

## Troubleshooting Information

- This scheduled process is incompatible with itself so can't run multiple instances of this process at the same time.
- If there are any errors, the scheduled process log lists the error messages.
- This process can be restarted if it failed. No special cleanup activity is required.
- If this scheduled process ran successfully, you can verify that the tracked emails are visible in digital sales.

# Partner Management

## Partner Program Enrollment Expiration Job

Use the Partner Program Enrollment Expiration scheduled process to set the enrollment status to EXPIRED for all enrollments whose contract term has expired.

This scheduled process sets enrollment status to expired when the enrollment status is APPROVED and the expiration date has passed the system date.

### When to Use

- You can run this scheduled process when the expiry date of the enrollment has passed and you want to set the enrollment status to expired.

## Privileges Required

Verify that you have the following privileges:

- Privileges:
  - ZPM\_MANAGE\_PARTNER\_PROGRAM\_ENROLLMENT\_PRIV
  - FUSION\_APPS\_CRM\_SES\_CRAWL\_APPID
  - FUSION\_APPS\_CRM\_SOA\_APPID
  - ORA\_ZCA\_CUSTOMER\_RELATIONSHIP\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB
  - ORA\_ZPM\_CHANNEL\_ACCOUNT\_MANAGER\_JOB
  - ORA\_ZPM\_CHANNEL\_OPERATIONS\_MANAGER\_JOB
  - ORA\_ZPM\_CHANNEL\_SALES\_DIRECTOR\_JOB
  - ORA\_ZPM\_CHANNEL\_SALES\_MANAGER\_JOB

## Before You Start

- Compatibility
  - This scheduled process isn't dependent on any other scheduled process.
  - There are no dependent scheduled process that must be taken into consideration before or after running this scheduled process
  - No significant load on the server, if the number of enrollments aren't very high.
  - This scheduled process doesn't launch any parallel jobs.

## Parameters

None.

## Troubleshooting Information

- Errors while running this scheduled process are written in the logs with the prefix Executable Exception error.

## Refresh Partner Dimension Members

Use the Refresh Partner Dimension Members scheduled process to refresh the partner dimension members materialized view.

## When to Use

This scheduled process refreshes the partner management view that displays partner dimensions like industry, types ,geographies and so on.

## Privileges Required

Verify that you have the following privileges:

- Privileges
  - ZPM\_CREATE\_PARTNER\_PRIV
  - ORA\_ZPM\_PARTNER\_ACCOUNT\_ADMINISTRATION\_DUTY

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - You can run this scheduled process when the partner dimensions are changed or not synchronized.
- Compatibility
  - This scheduled process isn't dependent on any other scheduled process.
  - There are no dependent scheduled process that must be taken into consideration before or after running this scheduled process
  - This scheduled process doesn't impact the server performance.

## Parameters

None.

## Troubleshooting Information

- Errors while running this scheduled process are written in the logs with the prefix Generic Error in the Procedure error.
- Errors are rare because this scheduled process refreshes the database. Errors may be displayed only when there are database view issues.

# Quota Management

## Publish or Revise Hierarchy Quotas

Use the Publish or Revise Hierarchy Quotas scheduled process to publish or revise territory quotas for all descendants of the chosen territory.

## When to Use

As an administrator, I want to easily be able to publish or revise the quotas a large group of territories, so that I easily and quickly reflect the changes in my organization or market expectations. Quota Management requires quotas to be published in order for the targets per territory, resource and period to be available in Business Intelligence.

- When bulk publish or revise is executed for a chosen territory it publishes or revises the quotas in a top down fashion covering all lower levels of the territory hierarchy
- When bulk publish is executed the status of the quotas that are in Published and Excluded quotas aren't published
- When bulk revision is executed the status of the quotas that are in Not Published and Excluded quotas aren't updated to Pending Revision
- When bulk publish or revise is executed the process publishes or revises the top level territory quotas, before moving down to the next descendant level and so on
- When bulk publish is executed and if the quota for parent territory can't be published. For example, it fails the validations, the corresponding quotas for the descendant territories isn't published
- This process can be run anytime after you finish allocating your quota. This process has no dependencies on other processes. Publishing quotas makes them available to your directs.

## Privileges Required

Verify that you have the following privileges:

- Roles
  - Sales Administrator
- Privileges
  - Run Publish or Revise Hierarchy Quotas (ORA\_MOT\_QM\_RUN\_PUBLISH\_REVISION\_HIERARCHY\_QUOTA\_PRIV)

Bulk publish revise is available for only sales administrators by default but can be secured by functional privilege. So you can make this available for other standard or custom roles.

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Run this scheduled process on a need basis.
- Execution Time:
  - Time varies based on the number of territories being evaluated for publish or revise.
- Compatibility:
  - There should be only one instance of the job running at any one time.

## Parameters



Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Sales Quota Plan	Mandatory	You can select Sales Quota Plan from drop down	Sales Quota Plan drop down displays only active and tracked sales quota plans.	None	This parameter is list of values driven.
Action	Mandatory	You can select publish or revise from the action drop down	The Action drop down displays these values <ul style="list-style-type: none"> <li>• Publish</li> <li>• Revise</li> </ul>	None	This parameter is list of values driven.
Territory Number	Mandatory	You can specify the unique territory number.	Unique Territory Number	None	If Sales Quota Plan and Territory combination isn't found , the scheduled process displays this error - <b>The record &lt;Sales Quota Plan&gt;,&lt;Territory Number does not exist.</b>

## Troubleshooting Information

- You can view the status of the publish or revise operation in the scheduled process UI.
- Validation errors and warning messages that prevented the publish of the territory quota are displayed in the error log.
- Any interactive warning validations aren't performed.
- When the program is submitted , you can Resubmit, Put on Hold, Cancel Process, Release Process as provided by the scheduled process UI.

### Related Topics

- [How can I publish quotas for a territory hierarchy?](#)

## Synchronize Quotas

Use the Synchronize Quotas scheduled process to synchronize the selected sales quota plan with any modifications to territories since the last synchronization time.

Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Only if you update territories using a territory proposal are the territory hierarchies automatically

synchronized with your active quota plan. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

- If all territories weren't successfully synchronized, then:
  - Synchronization status is set to Error
  - Last Synchronization Time isn't updated
- If all territories were successfully synchronized, then:
  - Synchronization status is set to Succeeded
  - Last Synchronization Time is updated to system date

## When to Use

Territories and the resources assigned to them change frequently. You can schedule the Synchronize Quotas process to run daily so that current and future quota plans that are active use the latest territory hierarchy.

There are two ways to synchronize:

- Synchronize button after selecting a quota plan on the Manage Sales Quota plans page
- Locate the Synchronize Quotas process on the Scheduled Processes page. Specify the quota plan you want to synchronize as a parameter. Run synchronization.

## Privileges Required

Verify that you have the following privileges:

- Role
  - Sales Administrator
- Privilege
  - MOT\_QM\_RUN\_SALES\_TERRITORY\_QUOTA\_SYNCHRONIZATION\_JOB\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Run this scheduled process on a daily basis.
- Execution Time:
  - Time varies based on the number of changes in the territories.
- Compatibility:
  - Allow multiple jobs to run in parallel, if they're for separate quota plans. The scheduled process runs a job only when the parameter is different from the currently running job.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Sales Quota Plan	Mandatory	You can select Sales Quota Plan from drop down	Sales Quota Plan drop down displays only new and active sales quota plans.	None	This parameter is list of values driven.

## Troubleshooting Information

- You can view the status of the publish or revise operation in the scheduled process UI.
- Validation errors and warning messages that prevented the publish of the territory quota are displayed in the error log.
- When the program is submitted , you can Resubmit, Put on Hold, Cancel Process, Release Process as provided by the scheduled process UI.

### Related Topics

- [Schedule Quota Processes](#)

## Quote Management

### Update Quotes Currency Conversion Rate

Use the Update Quotes Currency Conversion Rate scheduled process to update of the currency conversion rate on the quote header when the quote is edited.

Quotes only support quote lines within a single currency. However, when we are reporting on different quote line items, we have to deal with different currencies. For example, a computer manufacturing company Vision Corp sells its computers across Europe and America. Its is headquartered in the US and the corporate currency is US Dollars (USD) for reporting purposes. Computers sold in United Kingdom are sold in British Pounds (GBP). We need a GBP to USD conversion rate on quote header. Similarly, computers are sold in Swiss Francs (CHF) in Switzerland. The quote will also be in CHF. We need a CHF to USD conversion rate on quote header. To understand the revenue expected, we need to use the corporate currency conversion stamped on the quote header and use that to convert the three quote line items and then aggregate. This scheduled process helps with this conversion.

### When to Use

This scheduled process:

- Runs reports on quote line items and gets results for quote lines that are in different currencies.
- Supports currency conversion for quotes so that the right contract values are displayed for quote.
- Isn't run, quote contract values reporting is impacted.

## Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator
- Privileges:
  - ZCA\_MANAGE\_SALES\_ORDER\_JOB\_SCHEDULER\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Run this scheduled process on need basis.
- Execution Time
  - Takes approximately 13 seconds to process 60,000 records.
- Compatibility:
  - This scheduled process isn't dependent on any other business processes.
  - You can't run multiple instances of this process.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- There's no notification for this short running job.
- If this scheduled process didn't run successfully, you receive incorrect quote contract values. When this process is rerun, it picks up from where the job failed.
- This scheduled process is idempotent. This scheduled process can be restarted, if it failed in the initial run.
- No cleanup activity is required before running a failed scheduled process.
- There's no way to verify if this scheduled process is successful from the application. Review the scheduled process status.

## SaaS Enablement

### Create Company Information

Use the Create Company Information scheduled process to setup the initial company information data.

#### When to Use

This scheduled process is submitted automatically when Setup Assistant is submitted. The process will be submitted only if the environment is pristine and no data has been setup. The job performs the following:

- Submit this scheduled process to Synchronize users, roles, and role grants with definitions in LDAP.
- Invokes RoleProvRulesPrivateService.
- Invokes Enterprise Configuration Service that populates the enterprise information.
- Invokes Worker Service.
- Submit Send Pending LDAP Requests Job.
- Sets ZCA\_COMMON\_CORPORATE\_CURRENCY profile option with the provided currency.

#### Privileges Required

Verify that you have the following privileges:

- Roles:
  - Application Diagnostics Administrator
  - Application Implementation Consultant
  - IT Security Manager

#### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - The job can be submitted only once in an environment.
- Execution Time:
  - The job takes less than 30 minutes to complete.
- Compatibility:
  - This job gets submitted only once in an environment as part of Setup Assistant.

#### Parameters

Parameter	Mandatory or Optional	Description	Parameter Values	Special Combinations Required	Notes
Enterprise Name	Mandatory	Specifies Enterprise name	The name of the enterprise.	None	Populates the name of the enterprise.
Address Line 1	Mandatory	Specifies address	The address of the enterprise	None	Populates the address of the enterprise.
Corporate Currency	Mandatory	Specifies Corporate Currency	The currency used in sales transactions.	None	This parameter is List of Values driven.
Country	Mandatory	Sample, remove: Specifies the type of resource hierarchy.	The country of the enterprise.	None	This parameter is List of Values driven.

## Troubleshooting Information

- You can see the status of the process in Setup Assistant's progress page.
- The initial company information isn't populated and has to be manually captured.
- The scheduled process is idempotent. It can be started again, if it fails and starts again from the point of failure.
- The success of this scheduled process can be verified by checking the Company Information Quick Setup page. If the enterprise name, address and currency are populated, then the job was successfully completed.

### Related Topics

- [Speed Up Your Initial Setup with Setup Assistant](#)

## Load and Update Oracle Fusion CRM Cloud Metrics

Use the Load and Update Oracle Fusion CRM Cloud Metrics scheduled process to incrementally load and update usage and business metrics targeted to cloud usage patterns in Oracle Fusion CRM.

### When to Use

This scheduled process is used to generate internal metrics. It doesn't require additional scheduling or manual execution as it's scheduled to execute by default.

### Privileges Required

No special privileges or roles.

### Parameters

None.

## Troubleshooting Information

None.

# Sales Insights

## Generate Sales Insight Facts

Use the Generate Sales Insight Facts scheduled process to generate record-level facts for sales insights. This scheduled process generates the facts corresponding to each insight using the insight metrics.

### When to Use

This scheduled process:

- Is part of the Sales Insights feature and is expected to run at least once in a day for the desired results.
- Requires the Generate Sales Insight Metrics process to be successfully completed at least once.
- Is used to generate insight facts for each relevant record in the application.
- Generates facts based on the current status of record. So, any updates to the record is reflected only on next scheduled run of the process.

### Privileges Required

Verify that you have the following privileges:

- ZCA\_SALES\_INSIGHTS\_JOB\_PRIV
- FUSION\_APPS\_CRM\_ESS\_APPID

Verify that you have the following roles:

- Sales Administrator

### Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- Run this scheduled process on regular intervals, for example daily.
- Run this scheduled process at a time when normal operations are less, for example midnight, is preferred.

Execution Time:

- Less than a minute to process one data record.
- Less than 5 minutes to process 200K records.

#### Compatibility:

- Multiple instances of this scheduled process can't be run in parallel. All instances except the currently running instance are automatically moved to blocked status until the running process is completed.
- This process is self-incompatible and incompatible with Generate Sales Insight Metrics.

## Parameters

None.

## Troubleshooting Information

- This scheduled process is a background activity. Hence there is no notification on completion. But the process completion status can be monitored in the Scheduled Process page.
- This scheduled process is idempotent and hence a failed process doesn't affect any future runs. No cleanup is required before restart.
- The Insight facts can be verified using the REST endpoints. For more information about the REST API, see the Related Topics section.

#### Related Topics

- [REST Endpoint](#)

# Generate Sales Insight Facts Using Signals

Use the Generate Sales Insight Facts Using Signals scheduled process to generate record-level facts for sales insights using the signals generated for records. This scheduled process generates the facts corresponding to each insight using the insight metrics.

## When to Use

This scheduled process:

- Is part of the Sales Insights feature and is expected to run at least once in a day for the desired results.
- Requires the Generate Sales Insight Metrics process to be successfully completed at least once.
- Is used to generate insight facts for each relevant record in the application.
- Generates facts based on the current status of record. So, any updates to the record is reflected only on next scheduled run of the process.

## Privileges Required

Verify that you have the following privileges:

- ZCA\_SALES\_INSIGHTS\_JOB\_PRIV
- FUSION\_APPS\_CRM\_ESS\_APPID



Verify that you have the following roles:

- Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- Run this scheduled process on regular intervals, for example daily.
- Run this scheduled process at a time when normal operations are less, for example midnight, is preferred.

Execution Time:

- Less than a minute to process one data record.
- Less than 5 minutes to process 200K records.

Compatibility:

- Multiple instances of this scheduled process can't be run in parallel. All instances except the currently running instance are automatically moved to blocked status until the running process is completed.
- This process is self-incompatible and incompatible with Generate Sales Insight Metrics.

## Parameters

None.

## Troubleshooting Information

- This scheduled process is like a background activity. Hence there is no notification on completion. But the process completion status can be monitored in the Scheduled Process page.
- This scheduled process is idempotent and hence a failed process doesn't affect any future runs. No cleanup is required before restart.
- The Insight facts can be verified using the REST endpoints. For more information about the REST API, see the Related Topics section.

*Related Topics*

- [REST Endpoint](#)

## Generate Sales Insight Metrics

Use the Generate Sales Insight Metrics scheduled process to generate object-level metrics for sales insights. This scheduled process calculates and stores the metrics for each insight using the historical data in the application.

## When to Use

This scheduled process:

- Is part of the Sales Insights feature and is expected to run at least once in a week for the desired results.
- Doesn't depend on any other process.
- Is used to process the past data in the application for each insight and thereby generates the metrics for Sales Insights.
- Is used to generate the object level averages for Sales Insights. So, more the frequency of schedule, the higher is the accuracy.

## Privileges Required

Verify that you have the following privileges:

- ZCA\_SALES\_INSIGHTS\_JOB\_PRIV
- FUSION\_APPS\_CRM\_ESS\_APPID

Verify that you have the following roles:

- Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- Run this scheduled process on regular intervals, for example, every week.
- Run this scheduled process preferably at a time when normal operations are less, for example midnight.

Execution Time:

- Less than a minute to process one data record.
- Less than 5 minutes to process 200K records.

Compatibility:

- Multiple instances of this scheduled process can't be run in parallel. All instances except the currently running instance are automatically moved to blocked status until the running process is completed.
- This process is self-incompatible and incompatible with other Sales Insights scheduled processes such as Generate Sales Insight Facts, Generate Sales Insight Facts Using Signals, and so on.

## Parameters

None.

## Troubleshooting Information

- This scheduled process is a background activity. Hence there is no notification on completion. But the process completion status can be monitored in the Scheduled Process page.

- This scheduled process is idempotent and hence a failed process doesn't affect the future run. No cleanup is required before restart.
- The metrics data can be verified using the Metrics REST Endpoints. For more information about the REST API, see the Related Topics section.

#### Related Topics

- [REST Endpoint](#)

## Purge Redundant Sales Insight Facts

Use the Purge Redundant Sales Insight Facts scheduled process to purge the redundant facts that became old or irrelevant for the Sales Insights.

### When to Use

This scheduled process:

- Is part of the Sales Insights feature and is expected to run at least once in a month for the desired results.
- Have no dependencies with other processes.
- Helps to prevent unwanted facts piling up.

### Privileges Required

Verify that you have the following privileges:

- ZCA\_SALES\_INSIGHTS\_JOB\_PRIV
- FUSION\_APPS\_CRM\_ESS\_APPID

Verify that you have the following roles:

- Sales Administrator

### Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- Run this scheduled process on regular intervals, for example, every month.

Execution Time:

- Less than a minute to process one data record.
- Less than 2 minutes to process 200K records.

### Parameters

None.

## Troubleshooting Information

- This scheduled process is like a background activity. Hence no notification is displayed on completion. But the process completion status can be monitored in the Scheduled Process page.
- This scheduled process is idempotent and hence a failed process doesn't affect the future run of the scheduled process. No cleanup is required before restart.

# Service Request Management

## Deprecated - Aggregate Service Requests

Use the 'Deprecated - Aggregate Service Requests - Deprecated' scheduled process to be able to create BI reports on service performance that provide an aggregated view as it relates to interactions, compliance, and knowledge article usage.

Note that beginning with 24B, this process is replaced with the customer scheduled 'Loads Service Request and Interaction Data'. At some point in the future, 'Deprecated - Aggregate Service Requests - Deprecated' will be removed, so customers should begin using 'Loads Service Request and Interaction Data'.

It runs an ETL job to aggregate both transactional SR data and Interaction data to populate tables at the back end. BI reports created using the 'CRM – CRM Service Request Summary', 'Help Desk - HR Service Request Summary', 'Help Desk – Internal Service Request Summary', and 'CRM – CRM Interaction Aggregate' subject areas query the back end aggregate tables.

### When to Use

The scheduled process needs to be run in order to use the 'CRM – CRM Service Request Summary', 'Help Desk - HR Service Request Summary', 'Help Desk – Internal Service Request Summary', and 'CRM – CRM Interaction Aggregate' subject areas for creating ad-hoc BI reports. Out of box reports dependent on these subject areas will not show any data or show stale data unless this process is run.

For a list of out of box reports dependent on these subject areas, refer to the reports list at: <http://www.oracle.com/webfolder/technetwork/docs/reports/r13/Service-Reports-R13.xlsx>

### Privileges Required

Verify that you have the following privileges:

- To administer the job, the following privileges are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required:
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Beginning with 24B this scheduled process is replaced with 'Loads Service Request and Interaction Data'. Customers should schedule that process rather than this one. 'Deprecated - Aggregate Service Requests - Deprecated' is automatically scheduled by the system, but if the customer has also manually scheduled the process, they should un-schedule it before scheduling 'Loads Service Request and Interaction Data'.
- The recommended frequency is hourly
- Execution Time:
  - For single data record, the estimated execution time is less than 1 minute.
  - For batch job on volume of 50K records, the estimated execution time is less than 5 minutes.
- Compatibility:
  - When run for the first time, the process will take significantly longer to execute, since all data in the relevant tables will be loaded.
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the scheduled job doesn't run successfully, the next scheduled instance processes data from both jobs.
- This scheduled process is idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully BI reports from the following subject areas can be checked:
  - CRM -- CRM Service Request Summary subject area with the following metrics and look for recent data:
    - Time
      - Facts > Service Request Summary Compliance Facts

- Facts > Service Request Summary Interaction Facts
- Facts > Service Request Summary Knowledge Article Facts
- Helpdesk – HR Service Request Summary subject area with the following metrics and look for recent data:
  - Time
    - Facts > HR Help Desk Request Summary Compliance Facts
    - Facts > HR Help Desk Request Summary Interaction Facts
    - Facts > HR Help Desk Request Summary Knowledge Article Facts
- Helpdesk – Internal Service Request Summary subject area with the following metrics and look for recent data:
  - Time
    - Facts > Internal Help Desk Request Summary Compliance Facts
    - Facts > Internal Help Desk Request Summary Interaction Facts
    - Facts > Internal Help Desk Request Summary Knowledge Article Facts
- CRM -- CRM Interaction Aggregate subject area with the following metrics and look for recent data:
  - Time
  - Facts > Interaction Aggregate Facts

#### Related Topics

- [Service Requests Report](#)

## How do I delete messages from external email applications?

Use this scheduled process to delete inbound messages from external email applications.

### When to Use

Use this schedule process to delete emails from the Microsoft (MS) Exchange server after they've already been read. Note that this schedule process is only for the Microsoft Exchange server and not for any other external email application.

This schedule process supports integration of the application to the Microsoft Exchange server for the processing of inbound emails. When configured, the Oracle Fusion Application reads inbound emails directly from the MS Exchange inbox. You can configure and run this schedule process to delete emails in the inbox that have already been read to improve performance and keep your inbox clean.

**Note:** You can't manually run this schedule process. You can only enable this option. Perform the following steps to enable this delete:

1. Navigate to Setup and Maintenance work area and
  - o Offering: Service
  - o Functional Area: Communications Channels
  - o Task: Manage Email Configuration, Registration and Validation
2. Select the Delete Message option on the Configure External Applications page.

## Privileges Required

Verify that you've the following privilege or role:

Role

- Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - o The frequency of this schedule process is decided by the application and isn't configurable .
- Execution Time:
  - o The execution time depends upon the number of mails to be deleted.

## Parameters

None.

## Troubleshooting Information

- Administrators will see in the Scheduled Process page if the sync process failed.
- If this sync process doesn't complete successfully, you might see your meetings and Emails from Outlook in the application.
- Verification that the delete process ran successfully can be done by checking if there are no mails in the inbox.

## Fully Loads Action Plan Actions Data for Reporting

Use the 'Fully Loads Action Plan Actions Data for Reporting' scheduled process to create BI reports using the 'Service – CRM Service Request Action Plan Actions Real Time', 'Help Desk – HR Service Request Action Plan Actions Real Time', 'Help Desk – Internal Service Request Action Plan Actions Real Time', or 'CRM/Help Desk – Case Action Plan Actions Real Time' subject areas.

Fully loads action plan actions data, for reporting using the 'Service – CRM Service Request Action Plan Actions Real Time', 'Help Desk – HR Service Request Action Plan Actions Real Time', 'Help Desk – Internal Service Request Action Plan Actions Real Time', or 'CRM/Help Desk – Case Action Plan Actions Real Time' subject areas. The goal of the process is to provide a consolidation of the action owner from service request, activity, and case related records.

## When to Use

This process needs to be executed when there are owners assigned or updated for service request, activity, and/or case records. This is an on-demand job. You must run this job in the following scenarios:

Any time action plan actions data needs to be fully refreshed;

## Privileges Required

Verify that you have the following privileges:

- To administer the job, the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required:
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Based on need
- Execution Time:
  - For single data record, the estimated execution time is less than 1 second
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute
- Compatibility:
  - No other processes are triggered when this job runs;
  - No potential impact on the server performance while this job is running;
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job;
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time;

## Parameters

None.



## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process notification system;
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs;
- This scheduled process idempotent, and no cleanup activity is required if the job fails;
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, create a BI report from the relevant subject area with the associated metrics and search for recent data:
  - Service – CRM Service Request Action Plan Actions Real Time subject area:
    - Time
    - Facts > Service Request Action Plan Action Facts
  - Help Desk – HR Service Request Action Plan Actions Real Time subject area:
    - Time
    - Facts > HR Help Desk Request Action Plan Action Facts
  - Help Desk – Internal Service Request Action Plan Actions Real Time subject area:
    - Time
    - Facts > Internal Help Desk Request Action Plan Action Facts
  - CRM/Help Desk – Case Action Plan Actions Real Time subject area:
    - Time
    - Facts > Case Action Plan Action Facts

## Fully Loads Cross-Channel Interaction Data for Reporting

Use the Fully Loads Cross-Channel Interaction Data for Reporting scheduled process to create BI reports using the CRM – CRM Interaction Aggregate subject area.

Fully loads cross-channel interaction data, or refreshes the data based on a particular date, for reporting using the CRM – CRM Interaction Aggregate subject area.

### When to Use

This process needs to be executed when there are interactions crossing channels and agents. This is an on-demand job. You must run this job in the following scenarios:

- Any time interaction data needs to be refreshed from a specific date.

## Privileges Required

Verify that you have the following privileges:

- To administer the job the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
  
- To schedule the job the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Ad-hoc, based on need
  
- Execution Time:
  - For single data record, the estimated execution time is less than 1 second.
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute
  
- Compatibility:
  - No other processes are triggered when this job runs
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

## Parameters

You might need to specify some of the following parameters:

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
RefreshDate	Mandatory	Date from which data needs to be loaded/refreshed in the cross channel interaction table.	Date Values	None	This parameter is date LOV driven.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard ESS job notification system.
- If the scheduled job does not run successfully, user would need to re –run the job manually.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, create a BI report from the CRM – CRM Interaction Aggregate subject area with the following metrics and search for recent data:
  - Time
  - Facts > Interaction Cross Channel Aggregate Facts

## Fully Loads HCM Person Mapping Data for Reporting

Use the ‘Fully Loads HCM Person Mapping Data for Reporting’ scheduled process to create BI reports involving Helpdesk Contact (Worker) Business Unit and Organization.

Fully loads HCM person mapping data making it easier for reporting Worker related dimensions Business Unit and Organization. The goal of the process is to provide a consolidation of the assignment information per person (a person has associated only one assignment). This process truncates SVC\_BI\_HCM\_PERSON\_REF\_MAP table and then perform a full load.

### When to Use

This process needs to be executed when there are new or updated assignments for person records. This is an on-demand job. You must run this job in the following scenarios:

- Any time HCM person mapping data needs to be fully refreshed;

### Privileges Required

Verify that you have the following privilege:

- To administer the job, the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required:
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Based on need
- Execution Time:
  - For single data record, the estimated execution time is less than 1 second;
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute;
- Compatibility:
  - No other processes are triggered when this job runs;
  - No potential impact on the server performance while this job is running;
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job;
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time;

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard ESS job notification system;
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs;
- This scheduled process idempotent, and no cleanup activity is required if the job fails;
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, perform a BI report dimensional query on Helpdesk Contact Business Unit and/or Organization from any subject area that has these dimension. Commonly if the process has never run, the report will return no data; or if not run recently, then the data reported will be stale. For example, in the Help Desk – HR Service Requests Real Time subject area, select elements from HR Service Request Contact > Contact Business Unit and/or HR Service Request Contact > Contact Organization.

## Incrementally Loads Action Plan Actions Data for Reporting

Use the 'Incrementally Loads Action Plan Actions Data for Reporting' scheduled process to create BI reports using the 'Service – CRM Service Request Action Plan Actions Real Time', 'Help Desk – HR Service Request Action Plan Actions Real Time', 'Help Desk – Internal Service Request Action Plan Actions Real Time', or 'CRM/Help Desk – Case Action Plan Actions Real Time' subject areas.

Incrementally loads action plan actions data, for reporting using the 'Service – CRM Service Request Action Plan Actions Real Time', 'Help Desk – HR Service Request Action Plan Actions Real Time', 'Help Desk – Internal Service Request Action Plan Actions Real Time', or 'CRM/Help Desk – Case Action Plan Actions Real Time' subject areas. The goal of the process is to provide a consolidation of the action owner from service request, activity, and case related records.

### When to Use

This process needs to be executed when there are owners assigned or updated for service request, activity, and/or case records.

### Privileges Required

Verify that you have the following privileges:

- To administer the job, the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required:
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

### Before You Start

Review the following before scheduling this scheduled process:

- The recommended frequency is hourly
- Execution Time:
  - For single data record, the estimated execution time is less than 1 second
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute
- Compatibility:
  - Before scheduling this job, it's recommend that the job Fully Loads Action Plan Actions Data for Reporting is run once to fully populate the data
  - No other processes are triggered when this job runs
  - No potential impact on the server performance while this job is running
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.

- There are no issues with business processes executing in parallel with this job
- This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system
- If the scheduled job doesn't run successfully, the next scheduled instance will process data from both jobs
- This scheduled process idempotent, and no cleanup activity is required if the job fails
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, create a BI report from the relevant subject area with the associated metrics and search for recent data:
  - Service – CRM Service Request Action Plan Actions Real Time subject area:
    - Time
    - Facts > Service Request Action Plan Action Facts
  - Help Desk – HR Service Request Action Plan Actions Real Time subject area:
    - Time
    - Facts > HR Help Desk Request Action Plan Action Facts
  - Help Desk – Internal Service Request Action Plan Actions Real Time subject area:
    - Time
    - Facts > Internal Help Desk Request Action Plan Action Facts
  - CRM/Help Desk – Case Action Plan Actions Real Time subject area:
    - Time
    - Facts > Case Action Plan Action Facts

## Deprecated - Incrementally Loads Cross-Channel Interaction Data for Reporting

Use the 'Deprecated - Incrementally Loads Cross-Channel Interaction Data for Reporting - Deprecated' scheduled process to create BI reports using the CRM - CRM Interaction Aggregate subject area.

note that beginning with 24B, this process is replaced with the customer scheduled 'Loads Interaction Cross Channel Data'. At some point in the future, 'Deprecated - Execute Incremental Load of Cross-Channel Interaction Data for Reporting - Deprecated' will be removed, so customers should begin using 'Loads Interaction Cross Channel Data'.

## What this Scheduled Process Does

Incrementally loads cross-channel interaction data, for reporting using the CRM - CRM Interaction Aggregate subject area.

## When to Use

This process needs to be executed when there are interactions crossing channels and agents.

## Privileges Required

Verify that you have the following privileges:

- To administer the job the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Beginning with 24B this scheduled process is replaced with 'Loads Interaction Cross Channel Data'. Customers should schedule that process rather than this one. 'Deprecated - Execute Incremental Load of Cross-Channel Interaction Data for Reporting – Deprecated' is automatically scheduled by the system, but if the customer has also manually scheduled the process, they should un-schedule it before scheduling 'Loads Interaction Cross Channel Data'.
- The recommended frequency is hourly
- Execution Time:
  - For single data record, the estimated execution time is less than 1 sec.
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute
- Compatibility:
  - Before scheduling this job it is recommended that the job "Fully Loads Cross-Channel Interaction Data for Reporting" is run once in order to fully populate the data.
  - No other processes are triggered when this job runs
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled processes notification system.
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, create a BI report from the CRM – CRM Interaction Aggregate subject area with the following metrics and search for recent data:
  - Time
  - Facts > Interaction Cross Channel Aggregate Facts

## Deprecated - Incrementally Loads HCM Person Mapping Data for Reporting

Use the 'Deprecated - Incrementally Loads HCM Person Mapping Data for Reporting - Deprecated' scheduled process to create BI reports involving Helpdesk Contact (Worker) Business Unit and Organization.

note that beginning with 24B, this process is replaced with the customer scheduled 'Loads HCM Person Mapping Data'. At some point in the future, 'Deprecated - Execute Incremental Load of HCM Person Mapping Data for Reporting - Deprecated' will be removed, so customers should begin using 'Loads HCM Person Mapping Data'.

Incrementally loads HCM person mapping data making it easier for reporting Worker related dimensions Business Unit and Organization. The goal of the process is to provide a consolidation of the assignment information per person (a person has associated only one assignment).

## When to Use

This process needs to be executed when there are new or updated assignments for person records.

## Privileges Required

Verify that you have the following privileges:

- To administer the job the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required



- SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Beginning with 24B this scheduled process is replaced with 'Loads HCM Person Mapping Data'. Customers should schedule that process rather than this one. 'Deprecated - Execute Incremental Load of HCM Person Mapping Data for Reporting – Deprecated' is automatically scheduled by the system, but if the customer has also manually scheduled the process, they should un-schedule it before scheduling 'Loads HCM Person Mapping Data'.
- The recommended frequency is daily;
- Execution Time:
  - For single data record, the estimated execution time is less than 1 sec;
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute;
- Compatibility:
  - Before scheduling this job it is recommended that the job "Execute Full Load of HCM Person Mapping Data for Reporting" is run once in order to fully populate the data;
  - No other processes are triggered when this job runs;
  - No potential impact on the server performance while this job is running;
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job;
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time;

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard ESS job notification system;
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs;
- This scheduled process is idempotent, and no cleanup activity is required if the job fails;
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, perform a BI report dimensional query on Helpdesk Contact Business Unit and/or Organization from any subject area that has these dimensions. Commonly if the process has never run, the report will return no data; or if not run recently, then the data reported will be stale.

For example, in the Help Desk – HR Service Requests Real Time subject area, select elements from HR Service Request Contact > Contact Business Unit and/or HR Service Request Contact > Contact Organization.

## Deprecated - Incrementally Loads SR Audit data for BI Reporting

Use the Deprecated - Incrementally Loads SR Audit data for BI Reporting scheduled process to create business intelligence reports using the Service - CRM Service Request Lifecycle and Help Desk - Internal Service Request Lifecycle subject areas.

Note that beginning with 24B, this process is replaced with the customer scheduled 'Loads Service Request Lifecycle Data'. At some point in the future, 'Deprecated - Execute Incremental Load of SR Audit Data for Reporting - Deprecated' will be removed, so customers should begin using 'Loads Service Request Lifecycle Data'.

Incrementally loads SR audit data added since the previous run of the process, transforming the raw source data into a model that is better suited for Business Intelligence reporting as needed.

### When to Use

The scheduled process must be run to use the Service - CRM Service Request Lifecycle and Help Desk - Internal Service Request Lifecycle subject areas for creating ad-hoc Business Intelligence reports. Ready-to-use reports dependent on these subject areas don't show any data or show stale data unless this process is run regularly.

For a list of ready-to-use reports dependent on these subject areas, refer to the reports list in the Related Topics section.

### Privileges Required

Verify that you have the following roles or privilege:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job, the following privilege is required:
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Beginning with 24B this scheduled process is replaced with 'Loads Service Request Lifecycle Data'. Customers should schedule that process rather than this one. 'Deprecated - Execute Incremental Load of SR Audit Data for Reporting - Deprecated' is automatically scheduled by the system, but if the customer has also manually scheduled the process, they should un-schedule it before scheduling 'Loads Service Request Lifecycle Data'.
  - The recommended frequency is hourly.
- Execution Time:
  - The estimated execution time for single data record is less than 2 seconds.
  - The estimated execution time for batch job on volume of 50K records is less than 1 minute.
- Compatibility:

- When run for the first time, the process will take significantly longer to execute, since all audit data for SRs created since the start of the previous month will be loaded. Before running the process for the first time, ensure that SR auditing is enabled. If no SR audit data is available, the process will exit without creating any data for the Service – CRM Service Request Lifecycle, Help Desk - HR Service Request Lifecycle, and Help Desk - Internal Service Request Lifecycle subject areas.
- No other processes are triggered when this job runs.
- No potential impact on the server performance while this job is running.
- There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished.
- There are no issues with business processes executing in parallel with this job.
- This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If no fact data is available in the Service - CRM Service Request Lifecycle, Help Desk - HR Service Request Lifecycle, or Help Desk - Internal Service Request Lifecycle subject areas, but the scheduled process is running successfully, check to ensure the auditing is enabled.
  - Enable auditing of the Service Request object for Service - CRM Service Request Lifecycle subject area.
  - Enable auditing of the HR Help Desk Request object for Helpdesk - HR Service Request Lifecycle subject area.
  - Enable auditing of the Internal Service Request object for Helpdesk - Internal Service Request Lifecycle subject area.
- If the scheduled job doesn't run successfully, the next scheduled instance will process data from both jobs.
- This scheduled process is idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours. To manually release the lock sooner, run the process Unlock the Scheduled Process that Incrementally Loads SR Audit data.
- To verify that this scheduled process is loaded with the correct data for CRM/HCM, create a BI report from the Service - CRM Service Request Lifecycle subject area with the following metrics and check for recent data:
  - Time
  - Facts > Service Request Lifecycle Facts
- To verify that this scheduled process is loaded with the correct data for HR Helpdesk, create a BI report from the Help Desk – HR Service Request Lifecycle subject area with the following metrics and check for recent data:
  - Time
  - Facts > HR Service Request Lifecycle Facts.

- To verify that this scheduled process is loaded with the correct data for Internal Helpdesk, create a BI report from the Help Desk - Internal Service Request Lifecycle subject area with the following metrics and check for recent data:
  - Time
  - Facts > Internal Service Request Lifecycle Facts

## Loads HCM Person Mapping Data

Use the 'Loads HCM Person Mapping Data' scheduled process to create BI reports involving Helpdesk Contact (Worker) Business Unit and Organization.

Beginning with 24B, this process replaces the automatically scheduled 'Execute Incremental Load of HCM Person Mapping Data for Reporting'. There will be a period of soft cutover, where 'Execute Incremental Load of HCM Person Mapping Data for Reporting' will process the data, while 'Loads HCM Person Mapping Data' will perform no action. Once the period is over, 'Loads HCM Person Mapping Data' will process the data and 'Execute Incremental Load of HCM Person Mapping Data for Reporting' will perform no action. The soft cutover period will last for a minimum of 14 runs of 'Loads HCM Person Mapping Data' over 14 days. The period will end after 14 days and a minimum of 14 runs.

Incrementally loads HCM person mapping data making it easier for reporting Worker related dimensions Business Unit and Organization. The goal of the process is to provide a consolidation of the assignment information per person (a person has associated only one assignment).

### When to Use

'Loads HCM Person Mapping Data' scheduled process needs to be executed when there are new or updated assignments for person records.

### Privileges Required

Verify that you have the following privileges:

- To administer the job the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job, the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

### Before You Start

Review the following before scheduling this scheduled process:

- While the process that this scheduled process is replacing; 'Execute Incremental Load of HCM Person Mapping Data for Reporting', is automatically scheduled, if the customer has also manually scheduled it, any manually scheduled 'Execute Incremental Load of HCM Person Mapping Data for Reporting' process should be stopped.
- Please note that this scheduled process must be scheduled by the customer. Unlike the process it is replacing, it will not be automatically scheduled by the system.

- The recommended frequency is daily.
- Execution Time:
  - For single data record, the estimated execution time is less than 1 sec;
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute;
- Compatibility:
  - Before scheduling this job it is recommended that the job “Execute Full Load of HCM Person Mapping Data for Reporting” is run once in order to fully populate the data;
  - No other processes are triggered when this job runs;
  - No potential impact on the server performance while this job is running;
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job;
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time;

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs;
- This scheduled process idempotent, and no cleanup activity is required if the job fails;
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, perform a BI report dimensional query on Helpdesk Contact Business Unit and/or Organization from any subject area that has these dimension. Commonly if the process has never run, the report will return no data; or if not run recently, then the data reported will be stale. For example, in the Help Desk – HR Service Requests Real Time subject area, select elements from HR Service Request Contact > Contact Business Unit and/or HR Service Request Contact > Contact Organization.

## Loads Interaction Cross Channel Data

Use the Loads Interaction Cross Channel Data scheduled process to create BI reports using the CRM - CRM Interaction Aggregate subject area.

Beginning with 24B, this process replaces the automatically scheduled ‘Execute Incremental Load of Cross-Channel Interaction Data for Reporting’. There will be a period of soft cutover, where ‘Execute Incremental Load of Cross-Channel

Interaction Data for Reporting' will process the data, while 'Loads Interaction Cross Channel Data' will perform no action. Once the period is over, 'Loads Interaction Cross Channel Data' will process the data and 'Execute Incremental Load of Cross-Channel Interaction Data for Reporting' will perform no action. The soft cutover period will last for a minimum of 14 runs of 'Loads Interaction Cross Channel Data' over 14 days. The period will end after 14 days and a minimum of 14 runs.

Incrementally loads cross-channel interaction data, for reporting using the CRM - CRM Interaction Aggregate subject area.

## When to Use

The scheduled process needs to be run in order to use the CRM – CRM Interaction Aggregate subject area. Out of box reports dependent on this subject area will not show any data or show stale data unless this process is run.

## Privileges Required

Verify that you have the following privileges:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job, the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- While the process that this scheduled process is replacing; 'Execute Incremental Load of Cross-Channel Interaction Data for Reporting', is automatically scheduled, if the customer has also manually scheduled it, any manually scheduled 'Execute Incremental Load of Cross-Channel Interaction Data for Reporting' process should be stopped.
- Note that this scheduled process must be scheduled by the customer. Unlike the process it is replacing, it will not be automatically scheduled by the system.
- The recommended frequency is hourly.
- Execution Time:
  - For single data record, the estimated execution time is less than 1 second.
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute.

- Compatibility:
  - Before scheduling this job it is recommend that the job “Fully Loads Cross-Channel Interaction Data for Reporting” is run once in order to fully populate the data.
  - No other processes are triggered when this job runs.
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the scheduled job doesn't run successfully, the next scheduled instance will process data from both jobs.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, create a BI report from the CRM – CRM Interaction Aggregate subject area with the following metrics and search for recent data:
  - Time
  - Facts> Interaction Cross Channel Aggregate Facts

## Loads Service Request and Interaction Data

Use the Loads Service Request and Interaction Data scheduled process to be able to create BI reports on service performance that provide an aggregated view as it relates to interactions, compliance, and knowledge article usage.

Beginning with 24B, this process replaces the automatically scheduled ‘Aggregate Service Requests’. There will be a period of soft cutover, where ‘Aggregate Service Requests’ will process the data, while ‘Loads Service Request and Interaction Data’ will perform no action. Once the period is over, ‘Loads Service Request and Interaction Data’ will process the data and ‘Aggregate Service Requests’ will perform no action. The soft cutover period will last for a minimum of 14 runs of ‘Loads Service Request and Interaction Data’ over 14 days. The period will end after 14 days and a minimum of 14 runs.

It runs an ETL job to aggregate both transactional SR data and Interaction data to populate tables at the back end. BI reports created using the 'CRM – CRM Service Request Summary', 'Help Desk – HR Service Request Summary', 'Help Desk – Internal Service Request Summary', and 'CRM – CRM Interaction Aggregate' subject areas query the back end aggregate tables.

## When to Use

The scheduled process needs to be run in order to use the 'CRM – CRM Service Request Summary', 'Help Desk – HR Service Request Summary', 'Help Desk – Internal Service Request Summary', and 'CRM – CRM Interaction Aggregate' subject areas for creating ad-hoc BI reports. Out of box reports dependent on these subject areas will not show any data or show stale data unless this process is run.

For a list of out of box reports dependent on these subject areas, refer to the reports list at: <http://www.oracle.com/webfolder/technetwork/docs/reports/r13/Service-Reports-R13.xlsx>

## Privileges Required

Verify that you have the following roles or privilege:

- To administer the job, the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job, the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- While the process that this scheduled process is replacing; 'Aggregate Service Requests', is automatically scheduled, if the customer has also manually scheduled it, any manually scheduled 'Aggregate Service Requests' process should be stopped.
- Note that this scheduled process must be scheduled by the customer. Unlike the process it is replacing, it will not be automatically scheduled by the system.
- The recommended frequency is hourly
- Execution Time:
  - For single data record, the estimated execution time is less than 1 second.
  - For batch job on volume of 50K records, the estimated execution time less than 5 minutes.
- Compatibility:
  - When run for the first time, the process will take significantly longer to execute, since all data in the relevant tables will be loaded.
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.



- There are no issues with business processes executing in parallel with this job.
- This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process notification system.
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully BI reports from the following subject areas can be checked:
  - CRM – CRM Service Request Summary subject area with the following metrics and look for recent data:
    - Time
    - Facts > Service Request Summary Compliance Facts
    - Facts > Service Request Summary Interaction Facts
    - Facts > Service Request Summary Knowledge Article Facts
  - Helpdesk – HR Service Request Summary subject area with the following metrics and look for recent data:
    - Time
    - Facts > HR Help Desk Request Summary Compliance Facts
    - Facts > HR Help Desk Request Summary Interaction Facts
    - Facts > HR Help Desk Request Summary Knowledge Article Facts
  - Helpdesk – Internal Service Request Summary subject area with the following metrics and look for recent data:
    - Time
    - Facts > Internal Help Desk Request Summary Compliance Facts
    - Facts > Internal Help Desk Request Summary Interaction Facts
    - Facts > Internal Help Desk Request Summary Knowledge Article Facts
    - CRM – CRM Interaction Aggregate subject area with the following metrics and look for recent data:
      - Time
      - Facts > Interaction Aggregate Facts

## Loads Service Request Lifecycle Data

Use the Loads Service Request Lifecycle Data scheduled process to create BI reports using the Service - CRM Service Request Lifecycle, Help Desk – HR Service Request Lifecycle, and Help Desk - Internal Service Request Lifecycle subject areas.

Beginning with 24B, this process replaces the automatically scheduled 'Execute Incremental Load of SR Audit Data for Reporting'. There will be a period of soft cutover, where 'Execute Incremental Load of SR Audit Data for Reporting' will process the data, while 'Loads Service Request Lifecycle Data' will perform no action. Once the period is over, 'Loads Service Request Lifecycle Data' will process the data and 'Execute Incremental Load of SR Audit Data for Reporting' will perform no action. The soft cutover period will last for a minimum of 14 runs of 'Loads Service Request Lifecycle Data' over 14 days. The period will end after 14 days and a minimum of 14 runs.

Incrementally loads SR audit data added since the previous run of the process, transforming the raw source data into a model that is better suited for ad-hoc BI reporting.

### When to Use

The scheduled process must be run to use the Service - CRM Service Request Lifecycle, Help Desk – HR Service Request Lifecycle, and Help Desk - Internal Service Request Lifecycle subject areas for creating ad-hoc BI reports. Ready-to-use reports dependent on these subject areas don't show any data or show stale data unless this process is run regularly.

For a list of ready-to-use reports dependent on these subject areas, refer to the reports list in the Related Topics section.

### Privileges Required

Verify that you have the following roles or privilege:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job, the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

### Before You Start

Review the following before scheduling this scheduled process:

- While the process that this scheduled process is replacing; 'Execute Incremental Load of SR Audit Data for Reporting', is automatically scheduled, if the customer has also manually scheduled it, any manually scheduled 'Execute Incremental Load of SR Audit Data for Reporting' process should be stopped.
- Note that this scheduled process must be scheduled by the customer. Unlike the process it is replacing, it will not be automatically scheduled by the system.
- The recommended frequency is hourly.
- Execution Time:
  - The estimated execution time for single data record is less than 2 seconds.

- The estimated execution time for batch job on volume of 50K records is less than 1 minute.
- Compatibility:
  - When run for the first time, the process will take significantly longer to execute, since all audit data for SRs created since the start of the previous month will be loaded. Before running the process for the first time, ensure that SR auditing is enabled. If no SR audit data is available, the process will exit without creating any data for the Service – CRM Service Request Lifecycle, Help Desk – HR Service Request Lifecycle, and Help Desk - Internal Service Request Lifecycle subject areas.
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If no fact data is available in the Service – CRM Service Request Lifecycle, Help Desk – HR Service Request Lifecycle, or Help Desk – Internal Service Request Lifecycle subject areas, but the scheduled process is running successfully, check to ensure auditing is enabled.
  - Enable auditing of the Service Request object for Service – CRM Service Request Lifecycle subject area.
  - Enable auditing of the HR Help Desk Request object for Helpdesk – HR Service Request Lifecycle subject area.
  - Enable auditing of the Internal Service Request object for Helpdesk – Internal Service Request Lifecycle subject area.
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs;
- This scheduled process is idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours. To manually release the lock sooner, run the process Unlock Scheduled Process that Incrementally Loads SR Audit data.
- To verify that this scheduled process is loaded with the correct data for CRM/HCM, create a BI report from the Service – CRM Service Request Lifecycle subject area with the following metrics and check for recent data:
  - Time
  - Facts> Service Request Lifecycle Facts.

- To verify that this scheduled process is loaded with the correct data for HR Helpdesk, create a BI report from the Help Desk – HR Service Request Lifecycle subject area with the following metrics and check for recent data:
  - Time
  - Facts > HR Service Request Lifecycle Facts.
- To verify that this scheduled process is loaded with the correct data for Internal Helpdesk, create a BI report from the Help Desk – Internal Service Request Lifecycle subject area with the following metrics and check for recent data:
  - Time
  - Facts > Internal Service Request Lifecycle Facts.

## Monitor Action Plan Actions

Use the Monitor Action Plan Actions scheduled process to initiate Action Plans as well as evaluate and update the Status and Due Dates of actions within Action Plans.

An agent can add one or more Action Plans to Oracle CX Sales and Fusion Service objects and each Action Plan can have a list of actions to be performed by the agent or other Oracle CX Sales and Fusion Service users.

- On Initialization of an Action Plan, the process starts all initial actions in the plan and calculates the projected dates for the Action Plan and all actions in the plan.
- As actions in the plan are performed by users, the status of the Action Plan and the status of actions in the plan are updated.
- If an action requires an object be created (such as a new Service Request), the process creates the object for that step in the Action Plan.
- If an action is added or deleted from a plan, the process updates the plan's projected dates.
- In all of these scenarios, the process also executes all related Attribute Mappings.

## When to Use

This process must be executed when objects (such as Service Requests) have related Action Plans.

- This process doesn't have any prerequisite processes.
- This process is used to initiate Action Plans as well as evaluate and update the status and due dates of actions within Action Plans.
- Action Plans, as well as any associated objects, may be impacted if this process isn't executed as recommended.

## Privileges Required

Verify that you have the following privilege or role:

- Sales Administrator job role.

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency: Every 15 minutes.
- Execution Time:
  - Execution Time varies based on the complexity and number of Action Plans being evaluated.
- Compatibility:
  - There are no dependent scheduled process that should be considered before or after running this scheduled process.
  - There are no other scheduled process, business processes, integration processes, or events that the execution of the current scheduled process triggers.
  - No potential impact on the server performance while running this scheduled process.
  - Only a single instance of this scheduled process can be executed.
  - Any business processes can't be executed in parallel with this scheduled process execution.
  - This scheduled process is incompatible with itself.

## Parameters

Every time the scheduled process runs, it queries a specific number of plans to be processed. The scheduled process divides these plans into equal batches of sub requests, with each batch processed by an asynchronous sub process.

Name	Optional or Mandatory	Description	Values	Notes
SVC_AP_JOB_MAX_RECORDS	Optional	Total number of plans that the scheduled job will process.	1000	Maximum value is 1000; any value greater than 1000 is treated as 1000.
SVC_AP_JOB_THREADS	Optional	Maximum number of asynchronous sub processes in which all plans will be equally divided.	1 to 10	None.
SVC_AP_JOB_BATCH_SIZE	Optional	Minimum number of plans for each sub process.	greater than 20	No maximum value; any value less than 20 is treated as 20.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- On the Scheduled Processes page, the process status changes to **Succeeded** on completion of the job.
- If the scheduled process didn't run successfully, on the Scheduled Processes page, the process status changes to **Error** and the scheduled process restarts automatically. If the error status persists, an administrator should contact Oracle Support.

- This scheduled process can be restarted after a failure, but it's recommended that an administrator investigate the issue causing the failure.

## Monitor Service Request Milestones

Use the Monitor Service Request Milestones scheduled process to periodically check open milestones on service requests to see whether they have passed either the warning threshold or expiration date and time.

This process reviews all service request milestones that are open and not paused. For each milestone, the process does the following:

- raises a warning for milestones that have passed the warning threshold identified in the coverage, without being completed
- sets expiry of milestones that have passed the due date and time without being completed

### When to Use

You can run this scheduled process when you're using service request milestones to track service level agreements and other commitments. If you don't schedule this process to run, service request milestones aren't in warning or expired states. The downstream processes that rely on these states may be impacted. An example of such downstream processes is workflow e-mail that you may have configured.

### Privileges Required

Verify that you have the following roles or privileges:

- Roles
  - Application roles such as Service Request Administrator, HR Service Request Administration role
- Privilege
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

### Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - It is recommended to schedule this process to run every 15 minutes, if business requirements permit. If business requirements dictate, the process can be scheduled for every 5 minutes depending on volume.
- Execution Time:
  - Less than 10 seconds for a single record
  - Less than 3 minutes for 10k records (open milestones)
- Compatibility:
  - No compatibility considerations or dependencies.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- While scheduling the job, there is an option to provide recipient details for notification of the process completion.
- If the scheduled process didn't run successfully, the compliance of outstanding milestones and warnings aren't updated, and no compliance nor warning notifications are sent.
- If the job fails for some reason, there is no additional cleanup required; the next time the job runs, all pending records are found and processed accordingly.
- You can identify if the job has run successfully by confirming that non-compliant milestones have been marked as `Expired` by setting `ComplianceFlag` to N within the expected time frame. Similarly, milestones within the warning threshold time to expiration is marked as `Warned` by setting `WarnedFlag` to Y.

## Pause Service Business Intelligence Automatically Submitted Processes

Use this process to pause the processing of data by the automatically submitted process Execute Service Business Intelligence Automatically Submitted Processes.

### When to Use

The latter process runs the following four processes:

- Execute Incremental Load of SR Audit Data for Reporting
- Aggregate Service Requests
- Execute Incremental Load of Cross-Channel Interaction Data for Reporting
- Execute Incremental Load of HCM Person Mapping Data for Reporting

While these processes were replaced by four manually submitted processes in 24B, customers can choose to continue to use the automatically submitted process rather than the manually submitted processes. If the customer wants to pause processing of data by the automatically submitted process; for example, to perform a mass import or update, then this new process allows them to do that.

To resume processing of data, use the Resume Service Business Intelligence Automatically Submitted Processes process.

### What this On-Demand Process Does

Creates an internal marker than informs the automatically submitted process that it should not process any data when it runs (it is automatically scheduled to run hourly).

## When to Use

The process can be used to either temporarily or permanently pause the processing of data by the Execute Service Business Intelligence Automatically Submitted Processes process. The customer could run this process if they are planning to perform a mass update or import of data that may be impacted by the automatically submitted process. They could also run this process if they are planning to use the following four manually submitted processes added in 24B.

- Loads Service Request Lifecycle Data
- Loads Service Request and Interaction Data
- Loads Interaction Cross Channel Data
- Loads HCM Person Mapping Data

The process should only be run as needed.

## Privileges Required

To administer the job, one of the following roles are required with delete, execute, read and update:

- ORA\_SVC\_HELPDESK\_ADMINISTRATION
- ORA\_SVC\_SR\_ADMINISTRATOR

To schedule the job, the following privilege is required

- SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this on demand process:

- You can run this process while the Execute Service Business Intelligence Automatically Submitted Processes is currently running, but it will only take effect on the next run of that process.
- Execution Time:
  - The execution time is less than 2 seconds.
- Compatibility:
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There should only be only one instance of the job running at any one time.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

## Parameters

None.



## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the job doesn't run successfully, it can be submitted again.
- This process is idempotent, and no cleanup activity is required if the job fails.
- To verify that this process has been successful, run it again and verify the results in the execution log (the log will indicate that the automatically scheduled process is already paused).

## Purge Interactions

Use the Purge Interactions scheduled process to purge the `SVC_INTERACTIONS`, `SVC_INTERACTION_REFS`, and `SVC_MCA_INTERACTION_SUMMARY` tables.

This process deletes records in the `SVC_INTERACTIONS`, `SVC_INTERACTION_REFS` and `SVC_MCA_INTERACTION_SUMMARY` tables that are older than the specified number of days, are in a closed status and not associated with any open business objects. The retention period is specified using the profile option `SVC_INTERACTION_RETENTION_DAYS`.

## When to Use

This process is used to reduce space in the database consumed by interactions. Running this scheduled process removes interactions that are older than the specified period. To be deleted, interactions must adhere to all the following criteria:

- They must be older than the specified number of days.
- They must be in a closed state.
- They must not be associated with an open business objects.
- If they have a parent interaction, the parent must be in a closed state.
- If they have child interactions, the child interactions must all be in a closed state.

**Note:** Removing interactions removes entries from the Interaction History page. This page can be used to view corresponding chat transcripts and wrap-up details.

## Privileges Required

Verify that you have the following privileges:

- `FUSION_APPS_CRM_ESS_APPID`

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - The frequency is dictated by your data retention requirements.
- Execution Time:
  - This scheduled process should complete quickly. But the execution time is dependent on the amount of data being deleted.
- Compatibility:
  - This scheduled process doesn't affect the performance.

## Parameters

There are no parameters for this scheduled process. This scheduled process uses the `SVC_INTERACTION_RETENTION_DAYS` profile option to control the size of the retention window.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- If this scheduled process fails, the next run should pick up and delete any data older than the specified retention period.
- If an interaction doesn't get purged, verify that there are no open business objects associated with the interaction. Also verify that all child or parent interactions are closed.

## Purge Omnichannel Events

Use the Purge Omnichannel Events scheduled process to purge the `SVC_OMNI_EVENTS` table.

This process deletes records in the `SVC_OMNI_EVENTS` table that are older than the specified number of days. The retention period is specified using the profile option `SVC_OMNI_EVENTS_RETENTION_DAYS`.

## When to Use

This process is used reduce space in the database consumed by Omnichannel events. Running this scheduled process removes all events that are older than the specified period. Scheduling this process effectively limits the Omnichannel reports to the time window represented by the number of days passed into the process.

## Privileges Required

Verify that you have the following privilege or role:

- `FUSION_APPS_CRM_ESS_APPID user`

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - The frequency is dictated by your data retention requirements.
  - If you must retain only 30 days of data, you can run the job every day.
- Execution Time:
  - This job should complete fairly quickly. But the execution time is dependent on the amount of data being deleted.
- Compatibility:
  - This job doesn't affect the performance of the running system.

## Parameters

There are no parameters to run this scheduled process. This process uses the `svc_omni_events_retention_days` profile option to control the size of the retention window.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- If the job fails, the next run should pick up and delete any data older than the specified retention period.

## Refresh SVC\_BI\_QUEUE\_RESOURCES Table

Use the 'Refresh SVC\_BI\_QUEUE\_RESOURCES table' scheduled process to create BI reports using the 'Service – CRM Service Queue Resources Real Time' or 'CRM/Help Desk – Omni Channel Queue Resource Availability' subject areas.

It loads BI queue resources data for reporting using the 'Service – CRM Service Queue Resources Real Time' or 'CRM/Help Desk – Omni Channel Queue Resource Availability' subject areas.

## When to Use

This process needs to be executed when there are queue resources and team members data. You should run this job when you want to make an incrementally update of BI queue resource team data.

## Privileges Required

Verify that you have the following privileges:

- To administer the job, the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR

- To schedule the job the following privilege is required:
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- The recommended frequency depends on how often the queue resource and team member data changes. If not frequently, then the job can be run ad-hoc. If the data changes frequently, then daily or even hourly.
- Execution Time:
  - For single data record, the estimated execution time is less than 1 second
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute
- Compatibility:
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There should be only one instance of the job running at any one time, otherwise there will be issues. The job itself parallelizes the gathering of the data.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process notification process;
- If the scheduled job does not run successfully, user would need to re-run the job manually;
- This scheduled process idempotent, and no cleanup activity is required if the job fails;
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, create a BI report using the 'Service – CRM Service Queue Resources Real Time' or 'CRM/Help Desk – Omni Channel Queue Resource Availability' subject area, with metrics from the Facts folder to check recent data

## Refresh the Business Intelligence Queue Resources Table

Use the 'Refresh the Business Intelligence Queue Resources Table.' scheduled process to create BI reports using the 'Service – CRM Service Queue Resources Real Time' or 'CRM/Help Desk – Omni Channel Queue Resource Availability' subject areas.

It loads BI queue resources data for reporting using the 'Service – CRM Service Queue Resources Real Time' or 'CRM/Help Desk – Omni Channel Queue Resource Availability' subject areas.

### What this Scheduled Process Does

Incrementally loads cross-channel interaction data, for reporting using the CRM - CRM Interaction Aggregate subject area.

### When to Use

This process needs to be executed when there are queue resources and team members data. You should run this job when you want to make an incrementally update of BI queue resource team data.

### Privileges Required

Verify that you have the following privileges:

- To administer the job the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

### Before You Start

Review the following before scheduling this scheduled process:

- The recommended frequency depends on how often the queue resource and team member data changes. If not frequently, then the job can be run ad-hoc. If the data changes frequently, then daily or even hourly.
- Execution Time:
  - For single data record, the estimated execution time is less than 1 sec;
  - For batch job on volume of 10K records, the estimated execution time is less than 1 minute;
- Compatibility:
  - No other processes are triggered when this job runs;
  - No potential impact on the server performance while this job is running;
  - There should be only one instance of the job running at any one time, otherwise there will be issues. The job itself parallelizes the gathering of the data.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished. The job itself parallelizes the gathering of the data.

- There are no issues with business processes executing in parallel with this job.
- This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled processes notification system.
- If the scheduled job does not run successfully, the next scheduled instance will process data from both jobs.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully, create a BI report using the 'Service – CRM Service Queue Resources Real Time' or 'CRM/Help Desk – Omni Channel Queue Resource Availability' subject area, with metrics from the Facts folder to check recent data.

## Refresh Service Categories for Reporting

Use the Refresh Service Categories for Reporting scheduled process to create new BI reports involving Service Request (SR) Category.

Generates the service category hierarchy and stores it in the SVC\_CATEGORIES\_CF table in a flattened form to make it easier for easy reporting. Service category attributes in all service request subject areas obtain data from this table.

## When to Use

This process needs to be executed for several Infolets and out of box BI reports to show data for SR Category. In addition, any ad hoc report that uses the SR Category attribute either as a 'flat' column or in a hierarchical fashion will show data for SR Category only after this scheduled process is run. Otherwise SR Category shows as blank.

## Privileges Required

Verify that you have the following privileges:

- To administer the job, the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job the following privilege is required

- SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- The recommended frequency is hourly.
- Execution Time:
  - For single data record, less than 1 second.
  - For batch job on volume of 1K records, less than 30 seconds. The relevant data comes from the table SVC\_CATEGORIES, which doesn't usually have many rows.
  - Compatibility:
    - There are no prerequisites to run this scheduled process.
    - No other processes are triggered when this scheduled process runs.
    - No potential impact on the server performance while this job is running.
    - Only one instance of the scheduled process must run at any one time to avoid any potential issues.
    - There are no issues with business processes executing in parallel with this job.
    - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard ESS job notification system.
- If the scheduled job does not run successfully, the next scheduled instance will process all relevant data.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, the lock will automatically expire after 24 hours.
- To verify this scheduled process is running successfully perform a BI report dimensional query on Service Category from any subject area that has the dimension. Commonly if the process has not run, the report will return no data. If a custom category was recently added, it will be present in the report if the process has run successfully recently. For example in the Service – CRM Service Requests Real Time subject area, select elements from the Service Category folder.

# Resume Service Business Intelligence Automatically Submitted Processes

Use this process to resume processing of data by the automatically submitted process Execute Service Business Intelligence Automatically Submitted Processes

The latter process runs the following four processes:

- Execute Incremental Load of SR Audit Data for Reporting
- Aggregate Service Requests
- Execute Incremental Load of Cross-Channel Interaction Data for Reporting
- Execute Incremental Load of HCM Person Mapping Data for Reporting

This process would be run if the customer previously paused the processing of data using the Pause Service Business Intelligence Automatically Submitted Processes process.

## What this On-Demand Process Does

Removes an internal marker that informs the automatically submitted process that it should not process any data when it runs (it is automatically scheduled to run hourly).

## When to Use

Use the process to resume processing of data by the Execute Service Business Intelligence Automatically Submitted Processes process that was previously paused using the Pause Service Business Intelligence Automatically Submitted Processes process.

The process should only be run as needed.

## Privileges Required

Verify that you have the following roles or privilege:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job, the following privilege is required
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this on demand process:

- Execution Time:
  - The execution time is less than 2 seconds.
- Compatibility:
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.



- There should only be only one instance of the job running at any one time.
- There are no issues with business processes executing in parallel with this job.
- This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the job doesn't run successfully, it can be submitted again.
- This process is idempotent, and no cleanup activity is required if the job fails.
- To verify that this process has been successful, run it again and verify the results in the execution log (the log will indicate that the automatically scheduled process is not paused).

## Service Request Queue Assignment

Use the Service Request Queue Assignment scheduled process to assign service requests to queues.

This scheduled process:

1. Finds unassigned service requests.
2. Executes queue assignment rules.
3. Assigns matching service requests to appropriate queue.

## When to Use

Use this scheduled process to make sure every service request is assigned to a queue.

## Privileges Required

Verify that you have the following privilege or roles:

- Roles
  - ORA\_SVC\_HELPDESK\_ADMINISTRATOR
  - ORA\_SVC\_SR\_ADMINISTRATOR
- Privilege
  - MOW\_RUN\_BATCH\_ASSIGN\_PROCESS\_PRIV

## Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - On regular intervals, for example, hourly, daily or weekly depending on volume of service requests.
- Execution Time:
  - This scheduled process should run within seconds for a single service request, but could take few minutes or longer for multiple service requests depending on the number of unassigned service requests and number of queue assignments rules.
- Compatibility:
  - For this scheduled process to assign service requests to queues correctly, queue assignment rules must have been defined and published using the Manage Service Assignment Rules task.
  - This scheduled process modifies service request objects by populating the Queue field.
  - This scheduled process could be configured to work on Customer Relationship Management service requests or Human Capital Management service requests.
  - If you need a scheduled process to handle both Customer Relationship Management service requests and Human Capital Management Service Requests, you must configure two separate instances of this job with different parameters. Out of the two instances, one instance is for Customer Relationship Management service requests and another one is for Human Capital Management service requests. See the Parameters section.

## Parameters

You can specify some of the following parameters for Customer Relationship Management Service Requests:

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Work Object Code	Mandatory	Indicates business objects that get assigned to agents, such as, service requests.	ORA_Service_Request_Work_Object	None	None
Candidate Object Code	Mandatory	Indicates objects that are the possible pool of assignment candidates, such as queues.	ORA_Queue_Candidate_Object	None	None
Assignment Mode	Mandatory	Indicates the type of assignment processing. Matching is the only mode that is supported.	Matching	This value is driven by List of Values. Only Matching is supported.	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None	None
View Criteria Bind Values	Mandatory	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	No spaces are allowed in the value.	None
Rule Category ID	Optional	Not applicable for this process. Indicates the type of rule-processing that must be performed. For example, matching, scoring or classification, and so on.	Must be blank.	None	None
Rule Category Name	Optional	Indicates the type of rule-processing that must be performed. For example, matching, scoring or classification, and so on.	Must be blank.	None	None
Grouping Attribute	Optional	Not applicable for this process.	Must be blank.	None	None
Replace Team	Optional	Not applicable for this process.	Must be blank.	None	None
Number of Work Objects per Sub Process	Optional	Indicates number of records each sub job processes.	Default value is 1000.	This parameter (along with Max Sub Processes per Process) helps tune the performance of the scheduled process.	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Maximum Sub Process per Process	Optional	Indicates max number of sub jobs to be spawned for the given scheduled process.	Default value is 10.	This parameter (along with Number of Work Objects per Sub Process) helps tune the performance of the scheduled process.	None
Metrics Logging Interval	Optional	Indicates the number of work objects in a subprocess before logging assignment metrics, such as update metrics after processing 100 service requests. This is used if your object support Enterprise logging for assignment.	100	None	None
Test Data Parameters	Optional	Not applicable for this process.	Must be blank.	None	None
Diagnostic Mode	Optional	Indicates if the process must be run in diagnostic mode to view the details of assignment processing in an output log.	Not selected by default.	None	None

The following View Criteria table lists the view criteria name and their view criteria bind variable used to select Customer Relationship Management Service Requests compared to Human Capital Management Service Requests.

View Criteria Name	View Criteria Description	View Criteria Bind Values
OpenSRsUnassignedToQueueByStripeCd	Indicates the view criteria used to identify the service requests to be assigned.	BindStripeCd=ORA_SVC_CRM
OpenSRsUnassignedToQueueByStripeCdAnd	Indicates the view criteria used to debug by filtering by the Service Request Number. You must run the schedule process by turning on the diagnostic mode. As an Assignment Manager, you can take decisions	BindStripeCd=ORA_SVC_CRM, BindSrNumber=<Service Request Number>  Note that you must specify the Service Request Number instead of <Service Request Number>.

View Criteria Name	View Criteria Description	View Criteria Bind Values
	regarding the service queue using the logs.	

You can specify some of the following parameters for Human Capital Management Service Requests:

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Work Object Code	Mandatory	Indicates business objects that get assigned to agents, such as, service requests.	ORA_HCM_Service_Request_Work_Object	None	None
Candidate Object Code	Mandatory	Indicates objects that are the possible pool of assignment candidates, such as queues.	ORA_HCM_Queue_Candidate_Object	None	None
Assignment Mode	Mandatory	Indicates the type of assignment processing. Matching is the only mode that is supported.	Matching	This value is driven by List of Values, but only one value, that is, Matching is supported.	None
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None	None
View Criteria Bind Values	Mandatory	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	No spaces are allowed in the value.	None
Rule Category ID	Optional	Not applicable for this process. Indicates the type of rule-processing that is performed. For example, matching, scoring or classification, and so on.	Must be left blank.	None	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Rule Category Name	Optional	Indicates the type of rule-processing that is performed. For example, matching, scoring or classification, and so on.	Must be left blank.	None	None
Grouping Attribute	Optional	Not applicable for this process.	Must be left blank.	None	None
Replace Team	Optional	Not applicable for this process.	Must be left blank.	None	None
Number of Work Objects per Sub Process	Optional	Indicates number of records of each sub job processes.	Default value is 1000.	This parameter along with Max Sub Processes per Process helps tune the performance of the scheduled process.	None
Maximum Sub Processes per Process	Optional	Indicates max number of sub jobs to be spawned for the given scheduled process.	Default value is 10.	This parameter along with Number of Work Objects per Sub Process helps tune the performance of the scheduled process.	None
Metrics Logging Interval	Optional	Indicates the number of work objects in a subprocess before logging assignment metrics, such as update metrics after processing 100 service requests. This is used if your object support Enterprise logging for assignment.	100	None	None
Test Data Parameters	Optional	Not applicable for this process.	Must be left blank.	None	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Diagnostic Mode	Optional	Indicates if the process must be run in diagnostic mode to view the details of assignment processing in an output log.	Not selected by default.	None	None

The following View Criteria table lists the view criteria name and their view criteria bind variable to select Customer Relationship Management Service Requests compared to Human Capital Management Service Requests.

View Criteria Name	View Criteria Description	View Criteria Bind Values
OpenSRsUnassignedToQueueByStripeCd	Indicates the view criteria used to identify the service requests to be assigned.	BindStripeCd=ORA_SVC_HCM
OpenSRsUnassignedToQueueByStripeCdAnd	Indicates the view criteria used to debug by filtering by the Service Request Number. You must run the schedule process by turning on the diagnostic mode. As an Assignment Manager, you can take decisions regarding the service queue using the logs.	BindStripeCd=ORA_SVC_HCM, BindSrNumber=<Service Request Number>  Note that you must specify the Service Request Number instead of <Service Request Number>.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- To submit the job, you must enter all the mandatory parameters and click Submit. The scheduled process's main user interface page would show the process that was scheduled.
- The main job starts the sub processes depending on the number of records to process and waits until all sub process are completed.
- If a particular run for service request queue assignment job fails, next run should pick up unassigned service requests.

## Unlock Scheduled Process that Incrementally Loads SR Audit Data

Use the Unlock Scheduled Process that Incrementally Loads SR Audit Data process to remove the process lock created by the Execute Incremental Load of SR Audit Data for Reporting Loads Service Request Lifecycle Data scheduled process if there's there is no instance of that scheduled process running, but you're you are unable to start a new instance.

Removes the process lock created by the Loads Service Request Lifecycle Data process when that process fails to remove its lock automatically.

## When to Use

The process should only be run if the scheduled Loads Service Request Lifecycle Data process is unable to start and no other instance of the process is currently running. It should not be run under any other circumstance.

It should only be necessary to run this process if the Loads Service Request Lifecycle Data process is aborted (either manually or through some unexpected system event, such as a server crash) and doesn't get a chance to clean up before exiting.

## Privileges Required

Verify that you have the following roles or privilege:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA\_SVC\_HELPDESK\_ADMINISTRATION
  - ORA\_SVC\_SR\_ADMINISTRATOR
- To schedule the job, the following privilege is required:
  - SVC\_SCHEDULE\_SERVICE\_JOBS\_PRIV

## Before You Start

Review the following before scheduling this on demand process:

- Don't run this process if the Loads Service Request Lifecycle Data process is currently running.
- Execution Time:
  - The execution time is less than 2 seconds.
- Compatibility:
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

## Parameters

None.

## Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the scheduled job doesn't run successfully, it should be submitted again.



- This scheduled process is idempotent, and no cleanup activity is required if the job fails.
- To verify that this scheduled process has been successful, schedule the Loads Service Request Lifecycle Data process and confirm it is successfully able to load data.

## Territories

### How do I delete a territory proposal?

Use the Delete Territory Proposal scheduled process to delete the draft territory proposals specified by the input parameter.

#### When to Use

This scheduled process:

- Deletes the draft territory proposals when you have many draft proposals containing large numbers of territories or coverage records that you don't plan to activate.

#### Privileges Required

Verify that you have the following privilege:

- MOT\_VIEW\_SALES\_TERRITORY\_PRIV

Verify that you have the following role:

- Sales Administrator

#### Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- You can run this scheduled process on a need basis.

Execution Time:

- Takes minutes to complete the scheduled process if the proposal contains 1000's of territories and coverage.

Compatibility:

- There are no scheduled processes that are dependent on this scheduled process.
- You can run multiple instances of this scheduled process in parallel.

#### Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Proposal Number	Mandatory	Specify the proposal number to be deleted.	N/A	None	None

## Troubleshooting Steps

- You can use the notification settings of the scheduled process to be notified when the process is complete.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.
- To verify that this scheduled process ran successfully, go to the Manage Proposals page under Territories.

## Refresh and Promote Dimension Members

Use the Refresh and Promote Dimension Members scheduled process to refresh dimension members and promotes members to production. You can run this scheduled process whenever there are changes in source dimension members.

### When to Use

This scheduled process:

- Refreshes dimension members and promotes members to production.
- Is run when there are changes in the source dimension members.

### Privileges Required

Verify that you have the following privileges:

- MOT\_RUN\_TERRITORY\_DIMENSION\_SYNCHRONIZATION\_JOB\_PRIV

Verify that you have the following roles:

- Sales Administrator

### Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- We recommend that you run this scheduled process on a weekly basis.

Execution Time:

- The execution time is around 60 minutes for 10 million territory coverage.

#### Compatibility:

- There's no known potential impact on the server performance while running this scheduled process.
- You can't run multiple instances of this scheduled process running in parallel.
- There are no business processes that can't be executed in parallel with this scheduled process execution.
- This scheduled process is incompatible with itself.

## Parameters

None.

## Troubleshooting Steps

- You can use the notification settings of the scheduled process to be notified when the process is complete.
- This scheduled process is idempotent, which means, this scheduled process can be restarted, if it failed in the initial run. No cleanup is required.

# Refresh Territories from Resources

Use the Refresh Territories from Resources scheduled process to perform full or incremental synchronization of the resource hierarchy to a new or existing territory hierarchy. The resource-centric territory hierarchy is generated from your resource hierarchy when you enable forecasts using the quick setup. The Refresh Territories from Resources process synchronizes your territories periodically to match your latest resource hierarchy. The resources become the territory owners.

## When to Use

This scheduled process:

- Is automatically scheduled to run before each forecasting window freeze when Enable Sales Forecasting is set to Yes in Setup Assistant.

## Privileges Required

Verify that you have the following role:

- Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- We recommend that you run this scheduled process on a daily or weekly basis.

**Execution Time:**

- This scheduled process takes minutes to complete. The execution time depends on the number of resources and number of changes to the resource hierarchy.

**Compatibility:**

- Before you run Refresh Territories from Resources, you must have at least one dimension enabled using the Enable Dimensions and Metrics task and perform the Load and Activate action.
- There's no known potential impact on the server performance while running this scheduled process.
- You can't run multiple instances of this scheduled process running in parallel.
- There are no business processes that can't be executed in parallel with this scheduled process execution.
- This scheduled process is incompatible with itself.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Diagnostic Parameters	Mandatory	Specify the diagnostic parameters.	N/A	None	See Enable Forecasts with Quick Setup topic in the Related Topics section, specifically the topic Remove Your Resource-Centric Territory Hierarchy for the example of using this diagnostic parameter.

## Troubleshooting Steps

- You can use the notification settings of the scheduled process to be notified when the process is complete.
- This scheduled process is idempotent, which means, this scheduled process can be restarted, if it failed in the initial run. No cleanup is required.
- To verify that this scheduled process ran successfully, go to the Territories UI and view updates to resource-centric territories and the hierarchy.

*Related Topics*

- [Enable Forecasts with Quick Setup](#)

## Update Inheritance Recipients

Use the Update Inheritance Recipients scheduled process to update the inherited dimension of recipient territories. Dimensions are attributes that define jurisdictional boundaries of territories. For example, you can use the geography dimension to define territories by country or postal code.

## When to Use

This scheduled process:

- Updates the inherited dimensions of territories.
- Is used to update the recipient territories after you make changes to a source territory.

## Privileges Required

Verify that you have the following privileges:

- Run Territory Inheritance Recipient Update Job (MOT\_RUN\_TERRITORY\_INHERITANCE\_RECIPIENT\_UPDATE\_JOB\_PRIV)

Verify that you have the following roles:

- Sales Administrator

## Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- You can run this scheduled process on a need basis.
- We recommend that you run this scheduled process daily.

Execution Time:

- This scheduled process takes about 80 minutes for 500 territories having 500K coverage.

Compatibility:

- There's no known potential impact on the server performance while running this scheduled process.
- You can run multiple instances of this scheduled process in parallel.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Territory	Optional	Select the recipient territory.	N/A	None	None
Maximum number of Territories in Proposal	Mandatory	Specify the maximum number of territories.	Default value is 0.	None	None

## Troubleshooting Information

- You can use the notification settings of the scheduled process to be notified when the process is complete.
- If the execution of this scheduled process isn't successful, the inheritance recipient territories don't get updated.
- This scheduled process is idempotent, which means, this scheduled process can be restarted, if it failed in the initial run. No cleanup is required.
- To verify that this scheduled process ran successfully, go to the Territories UI and view the updates in the recipient territory details.

## User Context

### Age User Context Relevancy Feed

Use the Age User Context Relevancy Feed scheduled process to purge user context data. This context data is found in smart lists for Accounts, Opportunities, Leads, Partners, and so on. As an administrator, you can reset user context data for all users in your organization.

You can also use this scheduled process to clear data for a specific set of users. You can run this scheduled process when needed and for a maximum of 10 users.

### When to Use

This scheduled process:

- This scheduled process supports Smart list Saved Searches in Workspace, Infolets, Mobile, Digital Assistant, and Office 365.
- This scheduled process removes stale data in the User Context and hence in Smart Lists.
- You can specify the maximum number of days the data is relevant based on the creation date of the user relevancy feed using the Relevancy Aging Maximum Number of Days (ZCA\_UC\_AGING\_CYCLE) profile option. The default value of this profile option is 30 days.

### Privileges Required

Verify that you have the following roles:

- Sales Administrator
- Channel Administrator
- CRM Applications Administrator
- Partner Administrator

### Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- We recommend that you run this scheduled process once daily.

Execution Time:

- This scheduled process takes, typically, less than 30 seconds to process 25k records for a given user.

## Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
User List	Optional	Specify a list of users by separating the names with commas.	List of users	None	If you don't provide a list of users, by default, this scheduled process ages the user context feed for all users.

## Troubleshooting Steps

- As an administrator, you can set up your email for notification while setting up the scheduled process.
- If this scheduled process didn't run successfully, errors are displayed and the sales administrator would have to take necessary action. You may have to contact Oracle Support.
- You can start the process again or spawn a new scheduled process.
- To verify that this scheduled process has been successful, go to **Tools > Scheduled Processes** and check active or completed scheduled processes.

