Oracle Fusion Cloud Sales Automation

How do I configure Adaptive Search?

25B

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1 Introduction and Setup Overview

Audience and Scope

This playbook is intended for implementors and sales administrators who want to learn how to configure Adaptive Search, the search technology used with Redwood UX applications, for Oracle Sales in the Redwood User Experience.

While you can enable search for the standard sales objects with a few clicks when you run the Setup Assistant, this playbook explains how to configure the search experience. For example, you can enable searching on custom fields you created for standard objects, and you can make it possible for salespeople to group search results in list pages and Sales Dashboard visualizations. While configuration of standard objects is optional, you must configure search on custom objects and custom fields.

The chapter on saved searches explains how to provide your sales organization with preconfigured searches targeted to different audiences. Saved searches also form the foundation of visualizations that you can add to the Sales Dashboard, which provides salespeople with an overview of their customers and activities.

How to Use this Playbook

Use the *Overview of Adaptive Search Setup* topic to guide you through your initial configuration. Each setup step references relevant topics in the playbook.

The chapter on saved searches, explains how to set up saved searches and share them with different audiences in the sales organization. For an overview, review the topic *Overview of Saved Search Setup*.

The playbook covers additional topics. You learn how to set parameters to adjust the behavior of Adaptive Search and its background processes, and how to migrate your search configuration to other environments, for example.

Overview of Adaptive Search Setup

Here's a summary of the core setup steps for enabling and configuring Adaptive Search.

You must have the Application Implementation Consultant job role to complete the setup.

When you enable business objects for Adaptive Search or change the way search is implemented, you must run one of the publish processes (either a Full Publish or a Partial Publish) for the changes to take effect. Other setups take immediate effect.

Step	Description	Where to Get More Details
1	You can enable Adaptive Search for the standard sales objects when you run the Setup Assistant.	• *Run the Setup Assistant* • *Adaptive Search Configuration Provided by Oracle*

Step	Description	Where to Get More Details
	Running the Setup Assistant runs the Full Publish process and schedules required indexing processes at the recommended intervals. The Setup Assistant uses the standard search configuration provided by Oracle.	
2	If you didn't use the Setup Assistant to enable search, or if you're adding new objects, then open the Configure Adaptive Search task in Setup and Maintenance and select the objects to enable on the Setup Quick tab.	• *Enable Business Objects for Adaptive Search*
3	You can specify which fields you want to include in searches of objects and their related objects. Oracle includes the key standard fields, so you can skip this step if you haven't created custom fields and objects. You must configure search on custom fields and objects.	• *Make Additional Fields Searchable* • *Adaptive Search Configuration Provided by Oracle*
4	Publish the search configuration by selecting **Action** > **Full Publish** on the Setup tab. If you've run a full publish and you've added new objects or just changed the configuration, then you can save time by running a **Partial Publish**. You can monitor the progress of these processes on the **Monitor** > **Publish** tab.	• *Publish a Limited Set of Objects in Adaptive Search* • *How do I run and monitor Adaptive Search background processes?*
5	You can configure search filters on the **Configure UI** tab of the Configure Adaptive Search page. You can: • Specify which fields can be used as filters in UI searches and for display in search results. • Define groupings of filter values for use during search. For example, you can break down opportunities by revenue ranges: 0 to 10, 000, 10,000 to 100,000, 100,000 to 500, 000, and 500,000 and up.	• *Create Groupings of Values for Display in Search Filters* • *Enable Fields for Display as Filters and Search Result Columns* • *Enable the Grouping of Search Results*
6	Salespeople can use the Sales Dashboard to search across all the different sales objects. Standard objects are already enabled for this new version of the classic Global Search. However, you must enable the search for custom objects.	*Enable Custom Object Search in the Sales Dashboard*

Step	Description	Where to Get More Details
7	You can create and share saved searches for different roles in the organization. Saved searches can be used to create visualizations and tables for the Sales Dashboard.	*Overview of Saved Search Setup*

2 Set Up Adaptive Search

Enable Business Objects for Adaptive Search

Enabling a business object builds a search index and makes the object available for search and REST web services.

Watch video

1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search

    > **Note:** If this is your first time configuring Adaptive Search, then with the Sales Foundation functional area selected, click **Actions** and then select **Change Feature Selection** from the list. In the Edit Features: Sales Foundation page, click **Enable for Configure Adaptive Search** and click **Done**.

2. On the Configure Adaptive Search page, click the **Setup** tab.

    > **Note:** If you receive a message that Application Composer changes are being synced, you must wait until the sync process completes before using the Setup tab. You can use other features of the application in the meantime.

3. On the Setup tab, **Quick** subtab, select the objects you want to enable for Adaptive Search:
    - Account
    - Activity
    - Asset
    - Case
    - Campaign
    - Sales Competitor
    - Contact
    - Conversation

      Conversations Message
    - Deal Registration
    - Help Desk Contact

      Household
    - HR Help Desk Request
    - Installed Base Asset

- Internal Service Request
- Lead
- MDF Budgets
- MDF Claims
- MDF Requests
- Opportunity
- Partner
- Partner Contact
- Product
- Product Group
- Program Enrollments
- Quotes and Orders
- Quote and Order Line
- Revenue Lines
- Service Profile
- Service Request
- Subscription Covered Levels
- Subscription Products
- Subscriptions
- Territory
- Work Order

Enabling an object enables any custom child objects and any custom fields you created. Not all the objects are sales objects. Partner and Partner Contact are only pertinent for Partner Relationship Management. HR Help Desk Request, Internal Service Request, and Service Request are specific to Fusion Service. The Case, HR Help Desk Request, Installed Base Asset, Internal Service Request, Product, Product Group, and Work Order objects can be enabled for REST web services only.

> **Note:** Making the selection on the **Quick** tab enables the default search configuration. Use the **Advanced** tab to modify search behavior and to enable custom objects.

4. By default, the objects you enable on the Quick subtab are enabled in all the UIs that use Adaptive Search as well. You can disable objects from appearing in those UIs using the **Configure UI** and **Configure Global Search** tabs but keep them available for REST web services.
5. Click **Publish**.

Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the **Monitor** tab. The process can take several minutes to complete, depending on your data volume.

> **Note:** You can choose to publish only those objects for which you have changed the configuration. This avoids having to perform a full publish every time a configuration change is done, thus saving a lot of time.

6. Click the **Monitor** tab and **Publish** subtab to monitor the process. After the process completes with a status of succeeded, the Workspace icon appears on the home page. If the process completes with errors, contact your help desk.

Run the Full Publish Process

You must run the full publish process to index the objects you enabled on the Setup tab. To run the process, click **Action** > **Full Publish**.

You can monitor the indexing process on the Monitor tab, Publish subtab. Your new configuration becomes available after the indexing process completes. If the process completes with errors for some reason, contact your help desk.

Publish a Limited Set of Objects in Adaptive Search

You can choose to publish only those objects which have changed their configuration by performing a partial publish. This avoids having to perform a full publish every time there is a configuration change.

This significantly reduces the publishing time when changing Adaptive Search configuration or when adding new objects to your Workspace or other work areas powered by Adaptive Search.

Prerequisites

You must enable Partial Publish in the Parameters tab as it's disabled by default. For details, see the topic *How do I edit Adaptive Search parameters?*

Run Partial Publish for a Limited Set of Objects

> **Note:** After a quarterly update, you must perform a Full Publish before the Partial Publish is available for use. When you perform a Customization Set Migration, a full publish is started automatically.

Here are the steps to run a partial publish.

1. Sign in as a user with an administrator or setup role.
2. Go to the **Configure Adaptive Search** setup task.
3. From the Configure Adaptive Search page, click **Setup** > **Advanced**.
4. From the **Actions** menu, select **Partial Publish**.
5. Select only those objects you want to republish and click **Proceed with Partial Publish**.
6. Review your partial publish selections from the **Partial Publish** dialog and then click **Publish**.

Run and Monitor Adaptive Search Processes

You can run and monitor the different Adaptive Search background processes, such as the Publish process, on the Monitor tab of the Configure Adaptive Search page.

Start the Full Publish and Partial Publish processes from the Configure Adaptive Search page Setup tab. You can monitor their progress on Monitor tab, **Publish** subtab.

> **Note:** If you update the job request parameters after a job is submitted, then the results displayed on the progress bar might be unreliable.

You receive email notifications if the scheduled processes haven't completed within 12 hours. Emails are sent to the user who submitted the last successful process. You can also specify more email addresses when you schedule a process.

> **Note:** Oracle recommends that you perform a full publish each time you do a production to test (P2T) environment refresh.

You can run and monitor other processes listed in the following table on their respective subtabs.

> **Note:** You must have the Application Implementation Consultant job role to run the processes.

Process and Tab Name	Process Description	Recommended Schedule	Available Actions
Periodic Refresh	Indexing enables Adaptive Search to find records based on keyword search terms entered, search filters, saved search criteria, and other search criteria. Periodic Refresh enables Adaptive Search to search for imported records and records that have gone through the mass update process. While records you create and update in the UI are automatically indexed and made searchable within seconds, imported records or records updated by background processes aren't available for search until the process completes. **Note:** The **Publish** process should be completed before running the Periodic Refresh process. When you run the periodic refresh, the application checks if the needed entities for the Redwood user experience have already been published.	Every hour	• Change the process frequency by clicking **Schedule Periodic Refresh**. • Start the process immediately by clicking **Start Process**. • **Cancel Process** cancels the instance of the process you selected.
Publish	Publishes the Adaptive Search configuration you set up in the Quick Setup and Advanced Setup UIs.	You must click **Publish** to run the process each time you: • Make changes on the Setup tab.	You can monitor the progress of the publish process. Your configuration is active when the process completes successfully.

Process and Tab Name	Process Description	Recommended Schedule	Available Actions
	Note: For CLOB (Character Large Object) fields, only the first 4000 characters are indexed. New CLOB fields are no longer supported in Workspace. **Note:** Formula fields can't be configured. Also generated ID fields aren't available to enable for any objects in Adaptive Search. For example, you can't search on ID fields in Workspace such as Party ID, SR ID, Opportunity ID, Record ID for custom object, and so on. Such fields aren't searchable and can't be indexed by design.	• Perform a production to test (P2T) environment refresh When you run the periodic refresh, the application checks if the needed entities for Oracle Sales in the Redwood User Experience have already been published. If the Redwood entities haven't been published, then a Full Publish is submitted. Here are the different phases you can monitor from the progress bar: • Preparing for Indexing • Indexing in Progress • Updating References • Updating Latest Changes • Activating Indexes • Completed Your changes become effective when the process completes.	If the process fails to complete successfully, contact your help desk.
Maintenance	Backs up the current active meta model, removes older snapshots, and cleans up any search server index or snapshots that aren't associated with any workflow state of the meta model. **Note:** **Restore from Backup** is disabled if a meta model is being published.	Daily	You can restore the current active Adaptive Search configuration by clicking **Restore from Backup**. This action clears any saved changes that aren't yet published. To restore the last active Adaptive Search configuration version, click **Revert to Previous Version**. Any other actions should be taken by your help desk.
Territory and Resource Hierarchy Refresh	Updates the index with sales territory and resource hierarchy changes.	Weekly	• Change the process frequency by clicking **Schedule Periodic Refresh**. • Start the process immediately by clicking **Start Process**. • **Cancel Process** cancels the instance of the process you selected.
Update Rollups	Updates the index with latest changes in rollups.	Hourly or as required.	• Run the Adaptive Search **Publish** and this job will be scheduled automatically to run once every hour. • Start the process immediately by clicking **Start Process**.

Process and Tab Name	Process Description	Recommended Schedule	Available Actions
			• **Cancel Process** cancels the instance of the process you selected.
Synchronize Access Rules Data	Updates access group object sharing rules.	Automatically runs when a job, **Perform Object Sharing Rule Assignment Processing**, or job set is submitted for a batch of access group object sharing rules for all the available assignment objects.	Depending on your requirements, you can change the process frequency by clicking **Schedule Periodic Refresh**. You can also manually Start or Cancel the process at any time.
Synchronize Lookup Values	You can run the **Synchronize Lookup Values** job to sync values for the Subscription object predefined lookup type fields with Adaptive Search indexes. The Subscription objects include Subscription, Subscription Product, and Subscription Covered Level. This scheduled process helps to keep Subscription data up to date in Adaptive Search so that searching and filtering can be performed based on the latest data.	Runs once a week by default. **Note:** If the schedule for the **Synchronize Lookup Values** job isn't already created, it will be automatically scheduled to run weekly after the Adaptive Search **Publish** job is run.	Depending on your requirements, you can change the process frequency by clicking **Schedule Periodic Refresh**. You can also manually Start or Cancel the process at any time.

Note: The Publish and Periodic Refresh indexing processes include records based on the following condition:

```
LAST_UPDATE_DATE is greater than (CURRENT DATE - MAX_AGE_IN_DAYS) days.
```

For example, only those opportunities that were created and updated within the last 365 days are indexed and available. To view records older than 365 days for your specific object, you need to update the MAX_AGE_IN_DAYS entity to a greater number than 365.

How To Change Periodic Refresh Frequency

The default periodic refresh process runs every hour. However, you might want to change the frequency to run every 15 minutes so that any new records quickly appear in your saved searches.

Here's how to change the periodic refresh frequency.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search
3. From the **Configure Adaptive Search** page, click **Monitor** > **Periodic refresh**.
4. Select the job row which is currently running hourly and has a status of **Wait**.
5. Click **Schedule Periodic Refresh**.
6. Click **Change Frequency** and adjust the schedule to run every 15 minutes or per your specific requirement.

Adaptive Search Meta Model Types

Adaptive search saves the published configuration so you can restore the behavior you had before. Or you can restore to the one provided by Oracle. Meta models encode the information that's necessary to index the entities that are searched. Adaptive Search supports the following meta models, each with a distinct workflow state.

- Seeded Meta Model

  A ready to use model that's shipped to customers. You can click **Restore Defaults** to revert to the predefined meta model.
- Sandbox Meta Model

  A modified version of the Adaptive Search configuration is stored and saved when you change the configuration and click **Save** or **Save and Close**.
- Being Published Meta Model

  When the configuration changes are saved and you click **Publish**, the meta model is in a state of being published.
- Active Meta Model

  When the full publish job completes successfully, it becomes the active meta model.
- Archived Meta Model

  The previous successful version of the configuration becomes the archived meta model. There's only one archived version available.

Index Date Ranges for Adaptive Search Objects

Adaptive Search objects are categorized into transactional objects and reference objects. Transactional objects store Sales and Fusion Service transactions while reference objects don't. The following sections outline how the search records for both types of objects are indexed.

Transactional Objects

When indexing transactional object search records for the first time, Adaptive Search only indexes records that have the "Last Updated Date" within the last 365 days. Thereafter, records that are changed or created from transactional objects are incrementally added to the index. Here's a list of the Adaptive Search transactional objects:

- Activities
- Campaigns
- Case
- Deal Registration
- HR Help Desk Request
- Internal Service Request
- Leads
- Opportunities
- Quotes and Orders
- Quote and Order Lines

- Revenue Lines
- Service Requests
- Work Order

Note: There are two ways Adaptive Search indexes are kept up to date. Create, update, and delete operations in the UI are indexed near real time, usually in less than a second. However, bulk operations, such as import, are indexed by the Periodic Refresh process, which is run hourly by default.

See the following transactional object examples of what content is indexed for a specific action on a particular date for Opportunity records:

Date	Action	Index Content
Dec 15, 2018	Publish job is run	Records, which have Last Updated Date > Dec 15, 2017
Jan 10, 2019	New Opportunity created with name Green Servers	All previously indexed records plus the new opportunity record (Green Servers)
Jan 20, 2019	20 new opportunities created by an import job	All previously indexed records plus the 20 new records created (after the periodic refresh job completes)

Reference Objects

All records from the reference objects are indexed. Custom objects are treated as reference objects and hence all their records are indexed. Here's a list of the Adaptive Search Reference objects:

- All custom objects
- Account
- Asset
- Contact
- Installed Base Asset
- Partner
- Partner Contact
- Product
- Product Group
- Territory

Make Additional Fields Searchable

All of the key fields you need for search of standard objects are searchable (See the topic *Adaptive Search Configuration Provided by Oracle* for a list.)

However, you can enable additional fields for search, including custom ones. And you can remove existing fields from use. This example shows you how to enable the Chief Executive Name field. The field is a standard application text field, but the same procedure applies to any field, even a custom field on a standard application object. When you're done with this configuration and publish it, a salesperson can search on the CEO's name to find the account where the person is the CEO. The search also returns all of the opportunities for that account when you enable opportunities to be searched by account fields.

Suppose that you added the CEO name field to the Account UI and want to make entries in this field searchable.

Making the field searchable involves these steps:

1. Make the field searchable for its business object.
2. Optionally, you can enable the field for search of a related object.
3. You publish your configuration.
4. Enable the field for display in UIs as a column and a filter.

> **Note:** If you want the field to be displayed in the UI, either as a filter or as a column in search results, then you must enable it for display on the Configure Workspace UI tab of the Configure Adaptive Search page.

Make the Field Searchable in Its Business Object

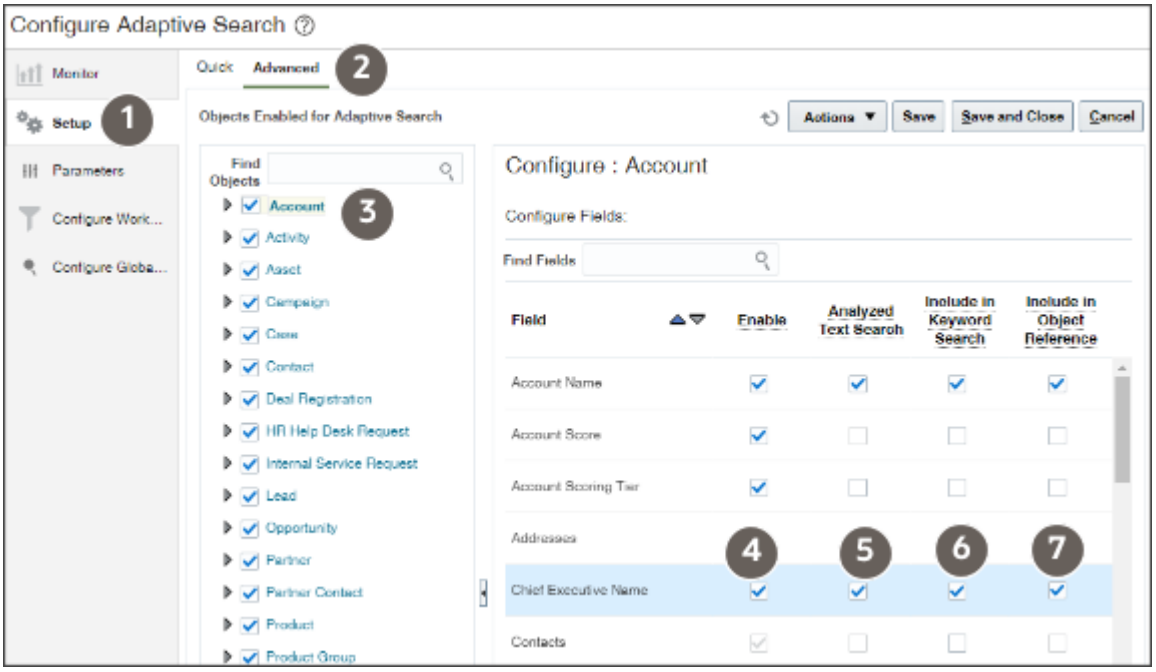
Here's how you make the field available for searching its business object. For example, making the account searchable by the CEO name.

1. Navigate to the Setup and Maintenance work area, and use the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, Setup tab (callout 1 in the screenshot), click **Advanced** (callout 2).

> **Note:** If you receive a message that Application Composer changes are being synced, you must wait until the sync process completes before using the Setup tab. You can use other features of the application in the meantime.

3. In the left pane, click the name link for the object where the custom field appears (callout 3). The CEO name field is an account field, so you click **Account**.

   The field is listed in the Configure Fields section.



4. Select the **Enable** option to index the field for Workspace and Global Search (callout 4).
5. For a text field, including Chief Executive Officer, select the **Analyzed Text Search** option to index individual words in the field. Your selection also enables fuzzy search (search that retrieves results with similar spellings). And you enable other search operators, including **All of the words** and **Any of the words**.
6. Select the **Include in Keyword Search** option to enable the field for searches in the Digital Sales list pages and in CX Sales Workspace and Global Search.

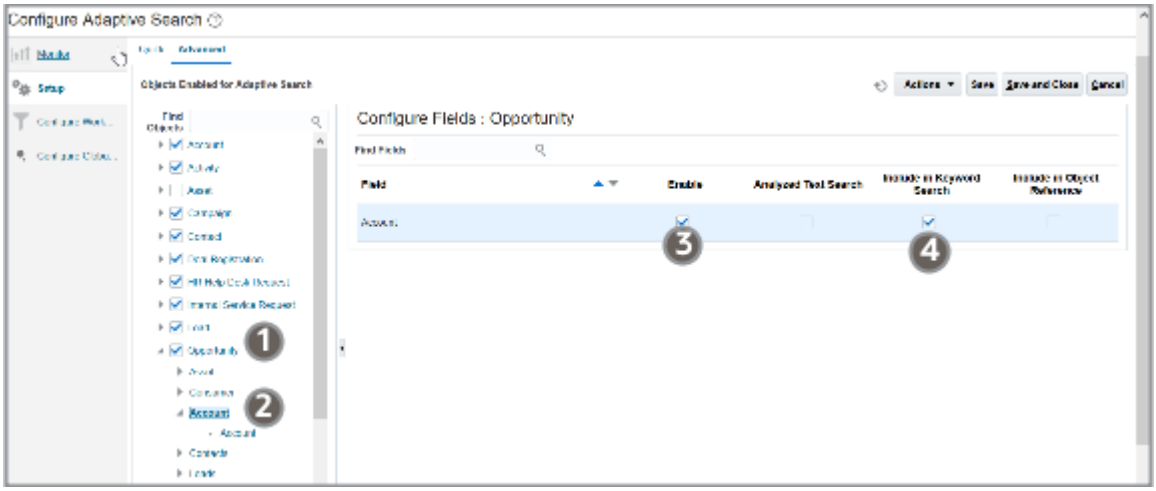
   If you leave this check box deselected, users can't search for accounts using the CEO name. But in Workspace, they can still add the Chief Executive Name field as a filter for accounts and search the field there. Global Search doesn't permit you to add filters, only to search by keyword.
7. Select the **Include in Object Reference** option to enable the field for search in related objects. Make the selection if you want to use the CEO name when searching for opportunities, for example.

   If you didn't select the **Include in Keyword Search** option, but select **Include in Object Reference**, then users searching opportunities can use the field only as a filter.

Make the Field Available for Searching a Related Object

You can only make the field available for search in a related business object if you selected the **Include in Object Reference** option for the field.

1. In the left pane of the window, open the object where you want to enable the search. For this example, Opportunity (callout 1 in the screenshot).



2. Select the field in the left pane, in this example, Account (Callout 2).
3. In the right pane, select **Enable** (callout 3).
4. If you want to use the field for searches in Global Search and in the Workspace Search box, then you must select the **Include in Keyword Search** option (callout 4).

   If you don't select this option, but selected Enable, then the field remains available as a filter in Workspace, but can't be searched in Global Search.

   The Include in Object Reference option isn't relevant here. Here's a summary of the two use cases:

Use Case	Enable	Include in Keyword Search
Users can search on the field using Global Search and in the Workspace Search box. For example, entering the CEO name, they get results containing, not only the account where the person is a CEO, but the opportunities for that account as well. In Workspace, they can also select the fields as a filter when searching for the object. For example, when searching for opportunities in Workspace, they can filter by CEO name.	Selected	Selected
Users can add the field as a filter in Workspace, but can't search on it using the Search box or using Global Search.	Selected	Deselected

Enable Fields for Display as Filters and Search Result Columns

You can specify which fields are available for selection as search filters and can be displayed as columns in search results and saved searches.

The fields you enable by selecting the **Display in UI** option from the Configure UI tab in the Configure Adaptive Search page are available for selection in the Edit Columns and Edit Filters windows.

> **Note:** Before you start, make sure that the field you are setting up as a filter is enabled for Adaptive Search. See the topic *How do I make a field searchable in the UI?* for details.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and click the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search

    The Configure Adaptive Search page appears.
3. Click **Configure UI**.
4. Select the object you want to set up in the left pane of the tab. You must open the hierarchy of related objects to get to some of the fields.
5. Ensure that the **Display in UI** option is selected for the fields you want enabled as filters and for display in search results.

    > **Note:** The default layout specifies that a minimum of four fields must be displayed for your Workspace UI configuration. Therefore, when editing Workspace UI columns and specifying fields, always ensure that you have at least four fields selected for both standard and custom objects.

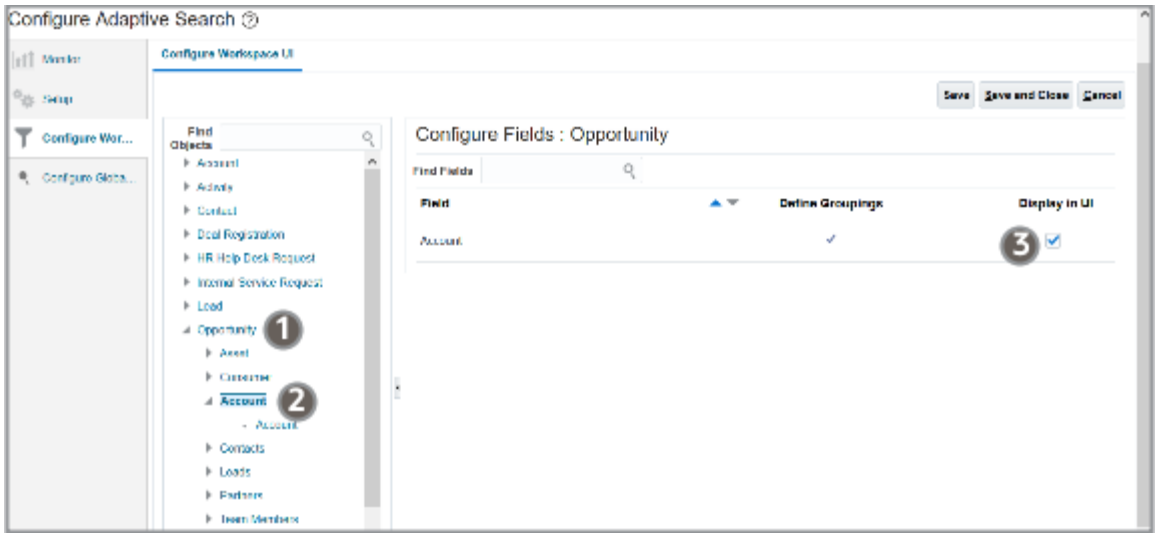
6. a. In the Configure Adaptive Search page, click **Configure UI**.

b. To enable the field for use as a filter on its object (for example, to enable the account field to be used as a filter when searching accounts), do the following:

   i. Select the object in the left pane of the Configure UI tab.
   ii. Select the **Display in UI** option for the field.

c. To enable the field for use in the UI of other related objects (for example, to enable a custom account field as a filter in opportunity searches), do the following:

   i. Display the related object hierarchy for the object where you want to enable the filter in the left pane of the Configure UI tab. For example, select Account (callout 1 in the following screenshot).
   ii. Locate and select the field's object in the object hierarchy. For a custom account field, select Account (callout 2).
   iii. Select the **Display in UI** option for the custom field (callout 3).



d. Click **Save and Close**.

7. Click **Save and Close**.
8. If you made changes to a field that's already published, then the field can be used as a filter immediately. Otherwise, you must run the publish process.

Create Groupings of Values for Display in Search Filters

You can create different groupings of values for numeric, corporate currency, percent, and date fields. These groupings display when the field is used as a filter in a search.

Watch video

Users get an overview of the number of records in each value grouping and they can select the groupings to narrow down their search results even more. For example, you can break down opportunity revenue into different ranges: 0 to 10,000, 10,000 to 100,000, 100,000 to 500,000, and 500,000 and up. When users use opportunity revenue as a filter, they see how many opportunities fall in each range. Selecting a range automatically displays a list of opportunities in that range.

You can also place related records displayed together as a group based on account, country, rank and so on. This provides an overview of the records in each value, and you can select a group list to narrow down your search results even more. You can also perform search based on the fiscal quarters.

> **Note:** By entering precise search criteria for your saved search, you can greatly decrease the number of search records returned and decrease the load time.

Before you start to create a value group field, ensure that the field is enabled for Workspace and enabled for UI display before creating its value groupings. See the Enable Fields for Display as Filters and Search Result Columns topic for details.

> **Note:** You can set up to a maximum of 6 filters. If you try to add more than six filters, you're prompted to remove filters to meet the maximum threshold of six. Here's how to create a grouping of values for display as a filter in your search.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and use:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search

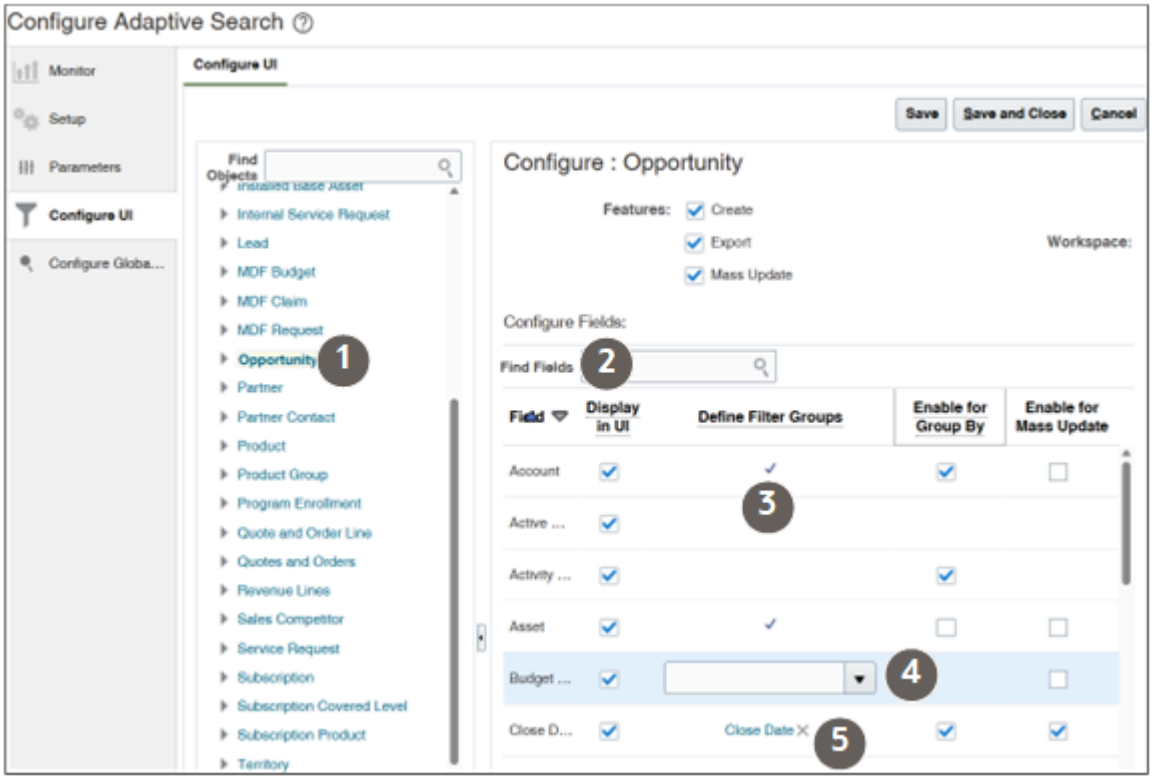
    The Configure Adaptive Search page appears.
3. Click the **Configure UI** tab.
4. Select the object where you want to set up filter value groupings in the left pane of the tab. You may have to open up the object hierarchy. The fields for the object display in the Configure Fields tab on the right.

    > **Note:** You can create filter value groupings only for fields that display a name of an existing grouping in the Define Filter Groups column. The **Defined Groupings (checked)** indicator (a check mark) in this column indicates filter groupings are created automatically. You can't create your own groupings for these fields.
5. If a filter grouping supplied by Oracle already exists for the field you want to set up, then remove the filter from the field. You can't edit filter value groupings provided by Oracle.
6. If no filter value groupings exist for the field, then click **Search** (the down arrow) to display the list of existing groupings and either select an existing grouping or click the **Create** link to create a new one.

    Here's a screenshot of a portion of the Configure UI page. Callouts identify the relevant features.

Callout Number	Description
1	Selecting an object on the left displays its fields on the right.
2	Selecting the **Display in UI** option makes the field available in the Workspace and Redwood UIs.
3	A check mark in the **Define Filter Groups** column indicates filter groupings are created automatically. You can't create your own groupings for these fields.

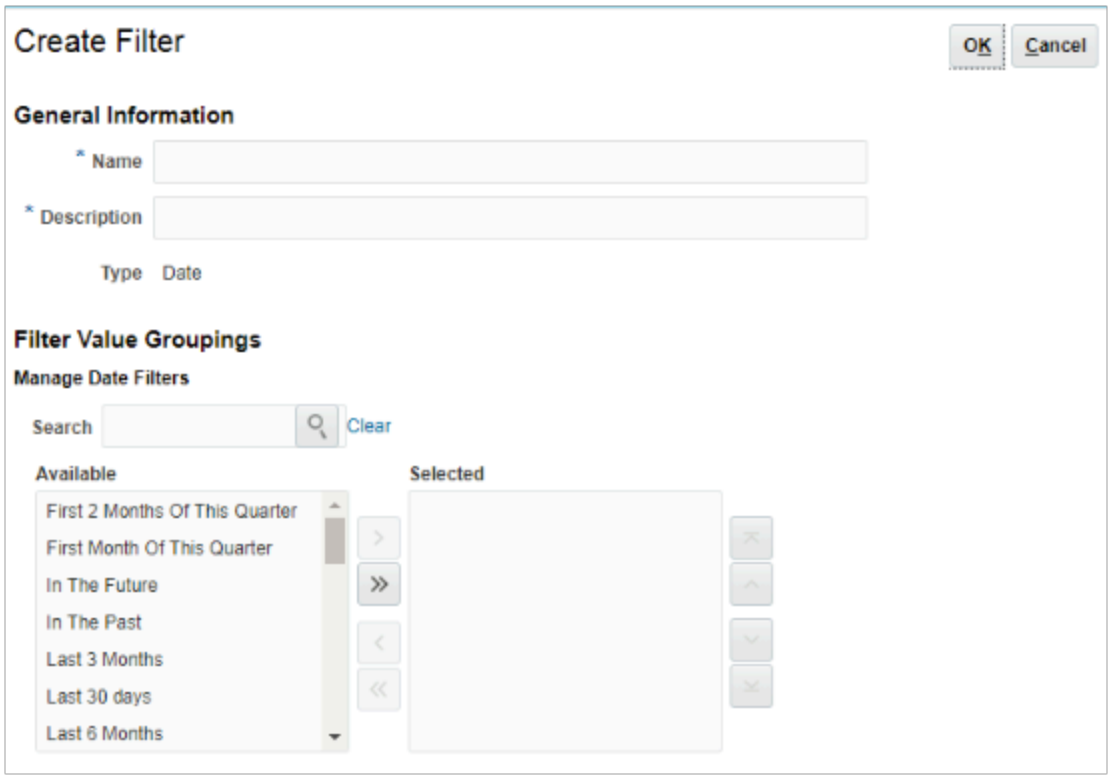
Callout Number	Description
4	Clicking Search (the down arrow icon) in the Define Filter Groups column displays a list of existing filters. Search is only available after you remove an existing grouping for the fields.
5	A name in the Define Filter Group column tells you that you can create filter groupings of your own. You must remove the existing filter groupings before selecting or creating a new one. You can edit groupings by clicking the name, but not those groups provided by Oracle.



7. If you're creating a filter for a date field, then do this:

    a. Enter a unique filter name and description. The filter name appears in the list of existing filters whenever you're adding a new filter.
    b. In the Manage Date Filters region, use the **Move** buttons (arrows) to select the date ranges you want to use in the filter and change their order. You can't create additional date ranges.

    The image shows a screen capture of the Create Filter page for a date field.



    c. Click **OK** when you're done.

> **Note:** In Workspace, a filter Date type such as Last Week is considered to be from Monday to Sunday and displays all records from Monday to Sunday of the previous week. Selecting a filter of Last Year, for example in 2021, would return all records from January 01 2020 to December 31 2020 for the selected search object.

8. If you're creating a filter for a numeric, corporate currency, or percent field, then do this:

    a. Enter a unique filter name and description. The filter name appears in the list of existing filters whenever you're adding a new filter.
    b. Create the filter value groupings. You can create up to 10 groupings. No gaps or overlaps are allowed between groupings. To create the groupings:

        i. Click **Add** (the plus icon).
        ii. For the first grouping, you can select either the **Less than** or the **Between** operator and enter the low and high values as appropriate.

            Results with the high value you enter aren't included in the filter value range. If you enter a range of 0 to 10,000 then the filter value grouping displays records between 0 and 9,999.

        iii. Subsequent groupings copy the high value from the previous grouping as the low value for the new grouping.

            The low value is inclusive. If the low value is 10,000, then the grouping displays results with 10,000.

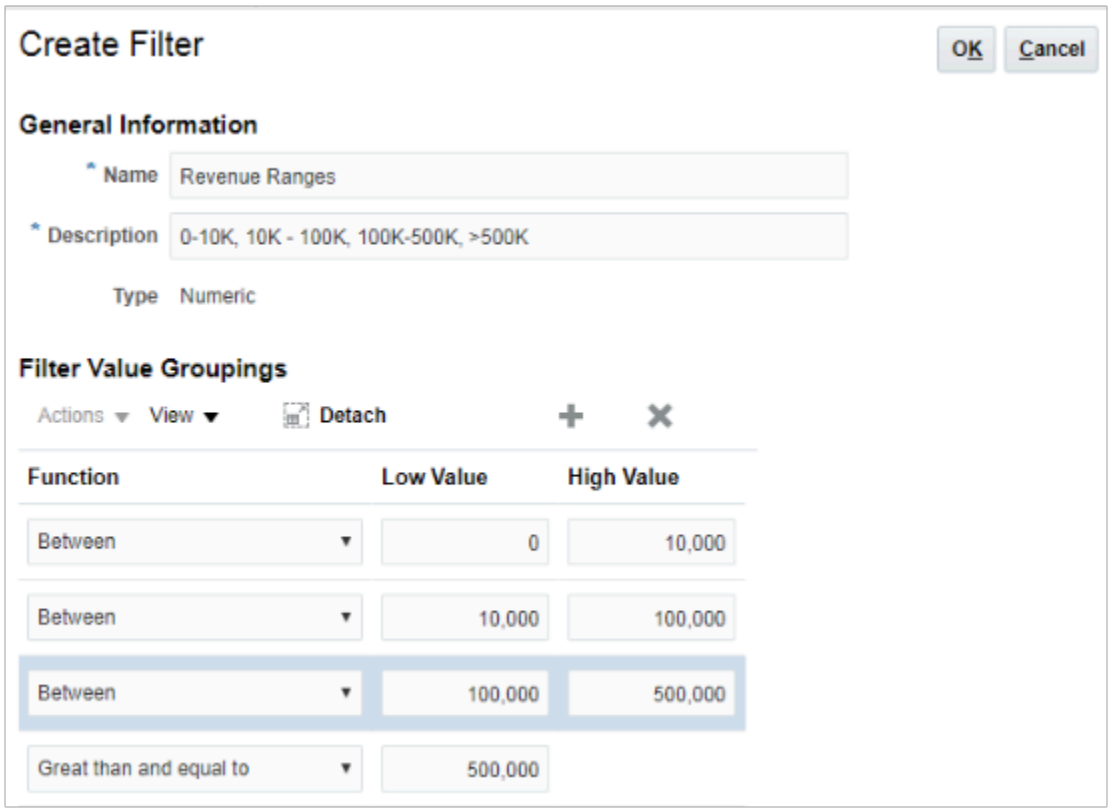
            You can use the **Between**, **Greater than and equal to** and **Equal to** operators.

    This table lists the filter value groupings for a sample filter called Revenue Ranges.

Function	Low Value	High Value
Between	0	10,000
Between	10,000	100,000
Between	100,000	500,000
Greater than or equal to	500,000	Not applicable. There's no high value for the Greater than or equal to function.

Function	Low Value	High Value

This image shows a screen capture of the Create Filter page for the sample Revenue Ranges numeric filter.



c. Click **OK** when you're done.

9. Ensure that the **Display in UI** option is selected for the fields you want to enable for use as filters in the UI. The fields are also available for display as columns in the search results.
10. Click **Save and Close**.

The changes you made are reflected in the Workspace UI. No publishing is required for the filter changes.

> **Note:** If your Accounting Calendar is modified, then you must click **Refresh Cache** from the Actions menu in the Setup, Advanced tab on the Configure Adaptive Search page. When complete, sign out and sign back in again to see the changes reflect in the Fiscal Year based filters.

Enable the Grouping of Search Results

To display search results in groups based on the specific fields on the object or related objects, you must set the Enable Group By in Workspace parameter to Y.

When the parameter is enabled, salespeople can view an overview of the number of records in each **Grouped By** grouping and can search and filter records within these groupings. They can also view aggregates such as count, average, and sum of values on the records of each group.

Enable the Group By Functionality

Here's how to enable the **Enable Group By** parameter.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Parameters** tab.
4. Highlight the **Enable Group By** and click **Edit**.
5. In the Warning message, click **Yes**.
6. In the **Current Value** field, change the value from N to Y and click **Save and Close**.

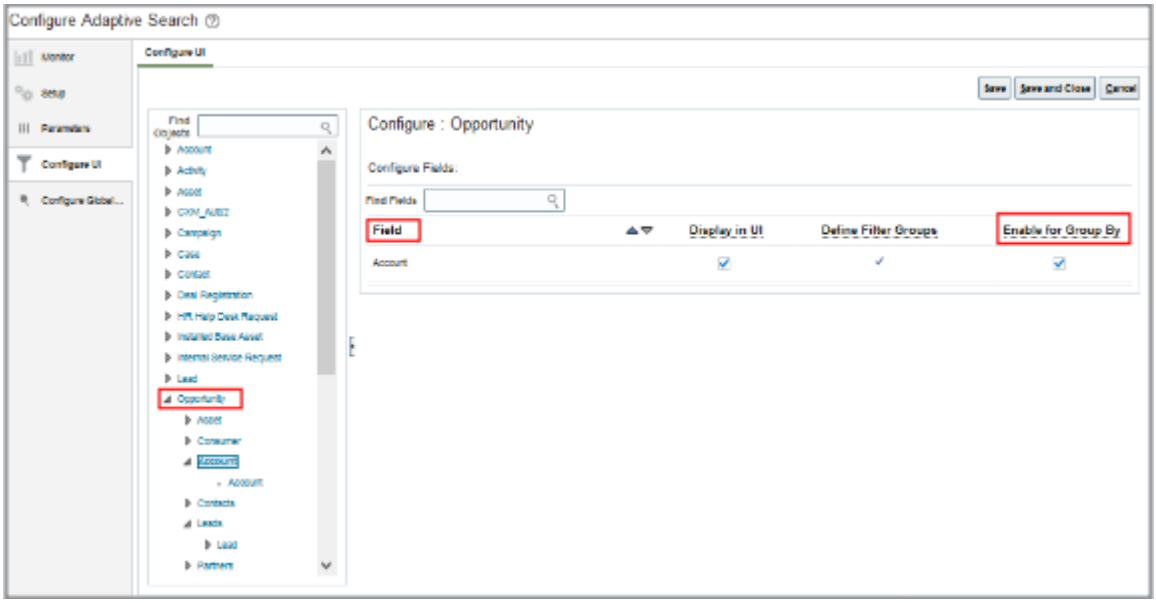
Specify Fields to Use for Group By

Here's how to specify field values for display as a filter in your Group By search.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and use:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search

    The Configure Adaptive Search page appears.
3. Click the **Configure UI** tab.

4. Select the object where you want to set up field values for your Group By search in the left pane of the tab. You may have to open up the object hierarchy. The fields for the object display in the Configure fields pane on the right as highlighted in the sample screenshot.



5. Select the **Enable for Group By** option for the fields you want to enable for use as a Group By search in the UI.

> **Note:** Ensure that the **Display in UI** option is also selected

6. Click **Save and Close**.
7. Sign out and then sign in again to see your changes.

No publishing is required. The changes you made are reflected in the Workspace UI for the Group By field drop-down lists for the selected object.

> **Note:** If you decide to turn off the **Enable for Group By** option, any saved searches you created will continue to work but won't have the group by functionality. However, if you decide to enable the group by feature again and if you didn't make any changes to your saved searches, then the group by feature will continue to function for your saved searches. If the **Enable for Group By** parameter is disabled and you update an existing saved search that has the group by option, then the saved search will be updated as a saved search without group by.

Set Adaptive Search Parameters

You can configure how Adaptive Search works and control how the Workspace interface operates using the Parameters tab available in the Adaptive Search setup page.

Modify the parameters to define the way the Adaptive search engine operates and runs the search indexing. For example, you can perform a partial publish to enable you to publish only those objects that have configuration modifications. This avoids having to perform a full publish every time a configuration change is done thus saving time.

Some of the parameters you can modify include timeouts, fetch sizes, maximum number of batches and so on. You can change parameters so that the indexing process runs successfully based on the server size and the volume of data to be indexed.

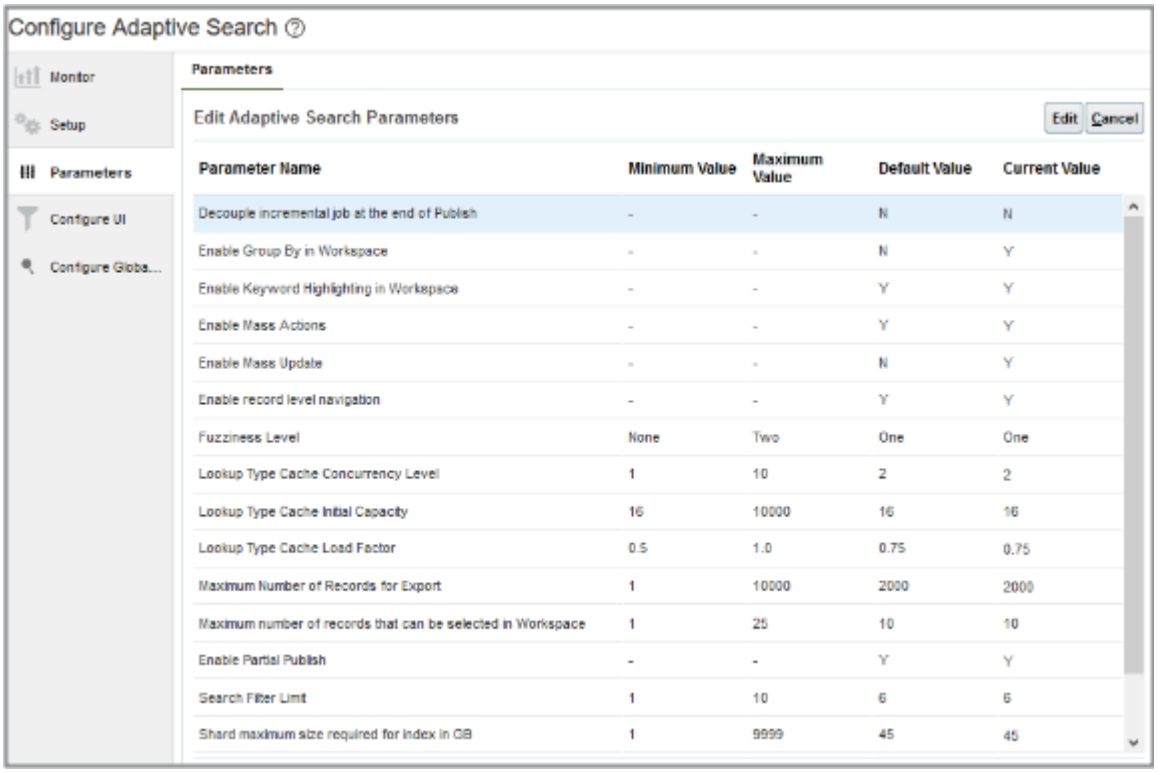
Parameter settings include the ability to enable mass actions and record-level navigation, specify the fuzziness level for search, set the default number of records to be displayed per page, and set the maximum number of records to export at one time. For example, you might want to modify parameter values for the following:

- Maximum Number of Columns Allowed
- Enable Group By
- Enable Mass Actions
- Enable Mass Update
- Enable Record Level Navigation in Workspace
- Search Fuzziness Level
- Maximum Number of Records for Export
- Number of records displayed per page in Workspace
- Enable Partial Publish
- Decouple Incremental Job at the End of Publish
- Enable Keyword Highlighting
- Maximum Number of Records That Can Be Selected
- Maximum Number of Columns to Optimize Column Sizing
- Maximum Number of Filters that can be Added in Workspace

You can also choose to change current and default values. Here's how to edit Adaptive Search parameters.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search

3. On the **Configure Adaptive Search** page, click the **Parameters** tab.



4. Highlight the **Parameter Name** that you want to change and click **Edit**. This warning is displayed.

```
You're about to change parameters that control how Adaptive Search works.
Changes should only be carried out by search setup experts. Do you want to
continue?
```

5. Click **Yes**.
6. In the **Current Value** field, makes the changes that you require and click **Save and Close**.

This table outlines the list of Adaptive search parameters available and shows the minimum, maximum, and default values.

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
Decouple incremental job at the end of Publish	At the end of a Publish process, a periodic refresh is run so that any records updated during the Publish process get updated. By default, the decouple parameter is set to N which means that the periodic job is run after the Publish process. Change this parameter to Y if you don't want the periodic process to run.	None	None	N
Enable Group By	Enable this parameter to view search results in groups based on specific fields on the object or related objects. Salespeople get an overview of the number of records in each Grouped By grouping and they can search and filter records within these groupings.	None	None	N

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
	They can also view aggregates such as count, average, and sum of values on the records of each group.			
Enable Keyword Highlighting in Workspace	Setting this parameter means that any keywords entered in the Search box are highlighted in the search results returned in Workspace.	None	None	Y
Enable CJK Language Detection for Non-Translatable Fields	You can perform a search on untranslatable name fields such as Account Name or Contact Name that contain Chinese, Japanese and Korean characters.	None	None	N
Enable Mass Actions	You can perform some actions on multiple records at the same time. For example, you can select multiple leads in Workspace and qualify them at once by selecting the Qualify action.	None	None	Y
Enable Mass Update	You can update multiple records at the same time. This saves you time and helps improve efficiency. For example, you might want to update the close date for opportunity records at the same time or change the Lead rank from Cool to Warm for multiple leads. Use the **Configure UI** tab from the Configure Adaptive Search page to specify which fields to enable for mass update. In addition, ensure that you select the **Enable for Mass Update** checkbox and have at least four fields selected for both standard and custom objects. **Note:** If the parent (controlling) attribute isn't enabled in Adaptive Search, the child (controlled) attribute can't be enabled for mass update. For example, let's say the controlling attribute of **Sales Method** is **Opportunity Type**. If Opportunity Type isn't enabled in Adaptive Search, then Sales Method won't be available to be enabled for Mass Update.	None	None	N
Enable record level navigation	You can use **Previous** and **Next** buttons on the record details page to navigate lists of records in Workspace.	None	None	Y
Enable Partial Publish	Set this parameter to do a publish on selected set of objects without doing a full publish.	None	None	N

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
Fuzziness Level	This parameter defines the number of character edits that's considered when a keyword search is performed. For a value of 1, the search term "redwood" returns Redwood in the search result.	None	Two	One
Initial target shard size required for index in GB	This parameter lets you set the initial target shard size for your search index file. 30 GB is the predefined value.	1	9999	30
Lookup Type Cache Concurrency Level	You can configure the Adaptive search lookup caching to build pipelines concurrently when the lookup table or index file is large. The default number of pipelines is 2.	1	10	2
Lookup Type Cache Initial Capacity	Set the initial capacity for the concurrent hash map that's used for the lookup type cache.	16	10000	16
Lookup Type Cache Load Factor	You can modify the cache load factor for the lookup type cache. The default factor is 0.75.	0.5	1.0	0.75
Maximum Number of Columns to Optimize Column Sizing in Workspace/List Page	Select the maximum number of columns for optimal sizing in Workspace list pages. The default is 8 columns to optimize column sizing.	1	20	8
Maximum columns allowed in the Workspace/List Page	Adjust the number of saved search columns to display in Workspace list pages. The default is 20 columns.	1	40	20
Maximum Number of Records for Export	This parameter represents the maximum number of records to save to the desktop in a single Export action by users.	1	10000	2000
Maximum number of records that can be selected in Workspace	This parameter enables you to change the maximum number of records that can be selected in Workspace to perform a mass action. The default number is 10 records, and you can select up to 25 records.	1	25	10
Minimum Characters to type in Search Box before Suggestions Filters are displayed	This parameter lets you change the minimum number of characters that you must include in the Search box before the suggestion filters are displayed. The default minimum value is 1 character. A value of 0 means the Filter Suggestions display immediately on clicking in the search box.	0	100	1

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
Number of records displayed per page in Workspace	You can change the number of records displayed on the search results page from the default value of 25 records up to a maximum of 100 records.	1	100	25
Screen Width in Pixels to Optimize Column Sizing in Workspace/List Page	Adjust the screen width in pixels to optimize the size of columns displayed in Workspace list pages. The default value is set as auto, which means that the screen will automatically adjust to the number of columns on the page.	1280	3840	Auto
Search Filter Limit	Set the number of filters you can include for your search. The default number of filters is 6.	1	10	6
Shard maximum size required for index in GB	This parameter lets you set the shard maximum size for your search index file in gigabytes (GB).	1	9999	45

Related Topics

- How do I access Workspace data offline?

How to Migrate Your Adaptive Search Configurations from Test to Production Environments

You can migrate your Adaptive Search configuration along with other configurations from your test environment to your production environment. From the Navigator, select Configuration Migration . For more detailed information, see the section Moving Application Changes in the Configuring Applications Using Application Composer guide.

To include the Adaptive Search configuration in your configuration migration, select the **Workspace Configuration** option. Before you migrate any changes, you must ensure that:

- ZCA_MANAGE_INTERACTIVE_LISTS_SAVED_SEARCH privilege is assigned to your role
- All changes are published on the target environment.
- There's no publish job in progress.

> **Note:** For CSM export, you must first run a publish job from Configure Adaptive Search to ensure that the active meta model version is updated to the latest release.

An error occurs if a publish job is in progress and if a Configuration Set Migration (CSM) import is triggered. Only migrate changes after your Adaptive Search publish has completed on the target.

Selecting the **Workspace Configuration** option migrates all of your Adaptive Search configurations except for saved searches you created. You must recreate any custom saved searches in the production environment after the migration is complete.

Trigger the CSM import on the customer environment only when all published jobs are in a successful state. After the successful completion of your CSM migration:

1. Navigate to your target environment and configure the Workspace UI.
2. Run a **Publish** job to ensure that all changes are indexed and available to Workspace.

Note: Don't manually configure the production environment for the features you're migrating.

Adaptive Search Configuration Provided by Oracle

Oracle provides you with a default Adaptive Search configuration as outlined here. For each of the supported business objects, the table lists:

- The fields you can add as filters
- The fields you can search using the Search box in all the UIs that use Adaptive Search

Fields in parentheses can be included as filters. For example, you can filter an account by contact name, primary address, primary phone, and so on.

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
Account	• Addresses • Contacts (Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Emails • Industries • Instant Messages • Last Updated By • Last Updated Date • Name • Organization Types • Owner • Phones • Primary Address	• Name • Primary Address • Primary Contact (Name, Primary Address, Primary Email, Primary Phone) • Primary Email • Primary Industry • Primary Instant Message • Primary Organization Type • Primary Phone • Primary URL • Registry ID

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Primary Contact (Name, Primary Address, Primary Email, Primary Phone) • Primary Email • Primary Industry • Primary Instant Message • Primary Organization Type • Primary Phone • Primary URL • Record Set • Registry ID • Team Members • Type • URLs	
Activity	• Account (Name, Primary Address) • Activity • Asset (Asset Number, Serial Number) • Call Report Count • Consumer • Contacts (Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Date • Delegated By • Description • Dismiss • Due Date • Last Updated By • Last Updated Date • Lead (Lead Name) • Location • Meeting Minutes • Opportunity (Name) • Owner • Primary Contact (Name) • Priority • Private	• Account (Name, Primary Address) • Consumer • Description • Meeting Minutes • Owner • Primary Contact (Name, Primary Address, Primary Email, Primary Phone) • Subject

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Record Set • Start Date • Status • Subject • Team members • Type	
Asset	• Account (Name, Primary Address) • Asset Name • Asset Number • Competitor Asset • Consumer • Contacts (Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Description • End Date • Install Date • Last Updated By • Last Updated Date • Manufacturer • Model • Product • Product Group • Purchase Date • Purchase Unit Price • Quantity • Record Set • Serial Number • Status • Team Members • Version • Year	• Account (Name, Primary Address) • Asset Name • Asset Number • Consumer • Description • Manufacturer • Model • Product • Product Group • Serial Number
Campaign	• Actual Cost • Budgeted Cost • Campaign Created By • Campaign Creation Date	• Campaign Number • Description • Name • Origin

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Campaign Last Update Date • Campaign Last Updated By • Campaign Number • Created By • Created by Module • Creation Date • Description • End Date • Last Updated By • Last Updated Date • Name • Owner • Parent Campaign • Product Description • Region Code • Source System Campaign ID • Start Date • Status • Total Leads • Total Opportunities • Total Opportunities Revenue • Type (Campaign Number, Name, and Status)	• Parent Campaign • Source System Campaign ID • Status • Type
Case	• Account (Name, Primary Address) • Activity ID • Actual Start Date • Address Line 1 • Assigned To (Name, Primary Email, Primary Phone) • City • Contact (Name, Primary Address, Primary Email, Primary Phone) • Contact Name • Country • Created By • Creation Date • Email • Estimated Start Date • Favorite	• Reference Number

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Field Service Resource (Name, Primary Email, Primary Phone) • Integration • Last Updated By • Last Updated Date • Partner Account (Name, Primary Address) • Phone • Postal Code • Primary Asset (Asset Number, Serial Number) • Product (Name) • Product Group (Name) • Record Set • Reference Number • Requested Date • Requested Date and Start Time • Requested Time Slot • Resolution Due • Scheduled Date • Scheduled Date and Start Time • Scheduled Time Slot • Service Request (Channel Type, Owner Type, Reference Number, Stripe Code, Title) • State • Status • Time Zone • Title • Work Order Area • Work Order Integration Status Code • Work Order Status (Status, Status Category) • Work Order Type (Work Order Type Code)	
Competitor	• Country Name • Created By • Creation Date • Last Updated By • Last Updated Date • Name • Registry ID	• Name

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• SIC Code • Status • Threat Level	
Contact	• Affinity • Annual Income • Buying Role • Contact Role • Created By • Creation Date • First Name • Job Title • Last Contact Date • Last Name • Last Updated By • Last Updated Date • Middle Name • Name • Owner • Preferred Contact Method • Primary Account (Name, Primary Address) • Registry ID • Registration Status • Sales Profile Status • Type • Accounts (Name, Primary Address) • Addresses • Emails • Instant Messages • Phones • Primary Address • Primary Email • Primary Instant Message • Primary Phone • Primary URL • Record Set • Team Members • URLs	• First Name • Job Title • Last Name • Middle Name • Name • Primary Address • Primary Email • Primary Instant Message • Primary Phone • Primary URL • Registry ID

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
Deal Registration	• Approval Decision By (Name, Primary Email, Primary Phone) • Approval Decision Date • Close Date • Contact Email • Contact First Name • Contact Last Name • Created By • Creation Date • Deal Products (Name) • Deal Size • Deal Type • Existing Account (Name, Primary Address, Registry ID) • Existing Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone) • Expiration Date • Job Title • Last Completed Activity • Last Completed Call Activity • Last Completed Email Activity • Last Updated By • Last Updated Date • Lead (Lead Name) • Name • New Account • New Contact • Next Task Due • Number of Completed Activities • Number of Completed Call Activities • Number of Completed Email Activities • Number of Products • Number of Team Members • Opportunity (Name) • Opportunity Account (Account Name, Name, Primary Address) • Opportunity Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)	• Registration Number • Existing Contact (Name) • Existing Account (Name, Primary Address, Registry ID) • Partner (Name, Partner Number, Primary Address) • Status

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Owner (Name, Primary Email, Primary Phone) • Partner (Name, Partner Number, Primary Address, Public Address ID, Public Email ID, Public Fax ID, Public Phone ID) • Partner Type • Record Set • Registration Number • Rejected Comments • Rejected Reason • Returned Comments • Returned Reason • Status • Submitted By (Name, Primary Email, Primary Phone) • Submitted Date • Team Members (Name, Primary Email, Primary Phone)	
HR Help Desk Request	• Assigned To (Name, Primary Email, Primary Phone) • Category Name • Channel Type • Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Critical • Date Closed • Date Reported • Language Code • Last Updated By • Last Updated Date • Messages (Channel Type, Message Content, Posted By) • Outcome Problem • Owner Type • Problem Description • Product (Name) • Product Group (Name) • Queue (Queue Name) • Record Set	• Contact (Name) • Reference Number

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Reference Number • Reported By (Name, Primary Email, Primary Phone) • Resolution Code • Resolution Date • Resolved By • Severity • Solution Description • Status Team Members (Name, Primary Email, Primary Phone) Title • Status Type • Stripe Code • Team Members (Name, Primary Email, Primary Phone) • Title	
Internal Service Request	• Assigned To (Name, Primary Email, Primary Phone) • Category Name • Channel Type • Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Critical • Date Closed • Date Reported • Language Code • Last Updated By • Last Updated Date • Messages (Channel Type, Message Content, Posted By) • Outcome Problem • Owner Type • Problem Description • Product (Name) • Product Group (Name) • Queue (Queue Name) • Record Set • Reference Number	• Contact (Name) • Reference Number

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Reported By (Name, Primary Email, Primary Phone) • Resolution Code • Resolution Date • Resolved By • Severity • Solution Description • Status Team Members (Name, Primary Email, Primary Phone) Title • Status Type • Stripe Code • Team Members (Name, Primary Email, Primary Phone) • Title	
Lead	• Accepted Date • Account (Name, Primary Address) • Consumer • Contacts (Name, Primary Address, Primary Email, Primary Phone) • Conversion Reason • Created By • Creation Date • Deal Size • Estimated Close Date • Existing Contact (Name, Primary Address, Primary Email, Primary Phone) • Last Updated By • Last Updated Date • Lead Name • Lead Number • Owner • Primary Product • Primary Product Group • Products • Qualification Date • Rank • Reassign Reason • Record Set • Score • Source	• Account (Name, Primary Address) • Consumer • Existing Contact (Name, Primary Address, Primary Email, Primary Phone) • Lead Name • Rank

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Status • Team Members	
Opportunity	• Account (Name, Primary Address) • Asset (Asset Number, Serial Number) • Close Date • Consumer • Contacts (Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Last Updated By • Last Updated Date • Leads (Lead Name) • Line of Business • Name • Owner • Primary Contact (Name, Primary Address, Primary Email, Primary Phone) • Primary Revenue • Record Set • Revenues • Sales Stage • Status Category • Team Members	• Line of Business • Name • Primary Revenue
Partner	• Addresses • Created By • Creation Date • Emails • Last Updated By • Last Updated Date • Level • Name • Owner (Name, Primary E-Mail, Primary Phone) • Parent Partner (Name, Owner, Partner Number, Primary Address) • Partner Contacts • Partner Number • Partner Types	• Name • Partner Number • Primary Address • Primary Contact (First Name, Last Name, Middle Name, Name, Primary Address, Primary E-Mail, Primary Phone, Primary URL) • Primary E-Mail • Primary Phone • Primary URL

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Phones • Primary Address (Address, City, Country, State) • Primary Contact (Name, Primary Address, Primary E-Mail, Primary Phone) • Primary E-Mail • Primary Phone • Primary URL • Record Set • Registry ID • Status • Team Members • URLs	
Partner Contacts	• Addresses • Certification Level • Certification Reason • Comments • Created By • Creation Date • Department • Department Code • Duplicate Type • Emails • Enrichment Status • First Name • Internal Job • Title • Last Assigned Date • Last Contact Date • Last Known Location • Last Name • Last Updated By • Last Updated Date • Middle Name • Name Partner (Name, Owner, Partner Number, Primary Address) • Phones • Primary Address (Address, City, Country, State) • Primary E-Mail	• First Name • Last Name • Middle Name • Name • Primary Address • Primary E-Mail • Primary Phone • Primary URL

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Primary Phone • Primary URL • Record Set • Registration Status • Title • URLs	
Quotes and Orders	• Account (Name, Primary Address) • Active • Amount • Contact (Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Description • Last Synchronized • Last Updated By • Last Updated Date • Name • Opportunity (Name) • Owner • Placed On • Quote ID • Quote or Order Number • Record Set • Reference Code • Reference Number • Status • Valid To Date • Version • Win Status	• Name • Quote or Order Number
Quote and Order Line	• Account (Name, Primary Address) • Contact (Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Last Updated By • Last Updated Date • Line Amount • Line Contract End Date	• Account • Contact • Opportunity • Order Line Item • Product Name • Record Set • Sales Orders

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Line Contract Value • Line Discount • Line Price Period • Line Price Type • Line Request Date • Line Status • Opportunity (Name, Opportunity Number, Status) • Order Line Item • Product Name • Record Set • Sales Orders (Active, Creation Date, Valid To Date, Name, Quote or Order Number, Amount, Status, Win Status)	
Revenue Lines	• Account • Amount • Best Case • Close Date • Competitor • Conversation Rate • Cost • Created By • Creation Date • Discount • Estimated Price • Expected Delivery Date • Expected Revenue • Favorite • Forecast Territory • Last Updated By • Last Updated Date • Margin • Opportunity • Owner • Primary Partner • Product • Product Group • Quantity • Record Set	• Account • Competitor • Created By • Forecast Territory • Last Updated Date • Opportunity • Owner • Primary Partner • Product • Product Group • Recurrence Type Code • Sales Credit Allocation • Sales Credit Type • Split Type Code • Status • UOM • Win / Loss Reason

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Recurrence Type Code • Sales Credit • Sales Credit Allocation • Sales Credit Type • Split Type Code • Status • UOM • Win Probability • Win / Loss Reason • Worse Case	
Service Requests	• Account (Name, Primary Address) • Asset (Asset Number, Serial Number) • Assigned To (Name, Primary Email, Primary Phone) • Category Name • Channel Type • Contacts (Name, Primary Address, Primary Email, Primary Phone, Registry ID) • Created By • Creation Date • Critical • Date Closed • Date Reported • Language Code • Last Updated By • Last Updated Date • Messages (Channel Type, Message Content) • Outcome • Owner Type • Primary Contact (Name, Primary Address, Primary Email, Primary Phone, Registry ID) • Problem Description • Product (Name) • Product Group (Name) • Queue (Queue Name) • Record Set • Reference Number • Reported By (Name, Primary Email, Primary Phone)	• Account (Name, Primary Address) • Consumer (Name, Primary Address, Primary Email, Primary Phone) • Primary Contact (Name, Primary Address, Primary Email, Primary Phone) • Reference Number

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Resolution Code • Resolution Date • Resolved By • Severity • Solution Description • Status • Stripe Code • Team Members (Name, Primary Email, Primary Phone) • Title	

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box

Territory	• Coverage
	  ○ Account Name
	  ○ Account Type
	  ○ Additional Attribute 1
	  ○ Additional Attribute 2
	  ○ Additional Attribute 3
	  ○ Additional Attribute 4
	  ○ Additional Attribute 5
	  ○ Aux1
	  ○ Aux2
	  ○ Aux3
	  ○ Business Unit
	  ○ Coverage Type
	  ○ Coverage Model
	  ○ Customer Size
	  ○ City
	  ○ County
	  ○ Country
	  ○ Geography
	  ○ Geography High ID
	  ○ Include Hierarchy
	  ○ Item
	  ○ Inventory Organization
	  ○ Industry
	  ○ Partner
	  ○ Province
	  ○ Postal Code
	  ○ Product Group
	  ○ Sales Channel
	  ○ Sales Subchannel
	  ○ State
	• Coverage Model
	• Created By
	• Creation Date
	• Description
	• Eligible for Quota
		• Coverage
		  ○ Account Name
		  ○ Account Type
		  ○ Additional Attribute 1
		  ○ Additional Attribute 2
		  ○ Additional Attribute 3
		  ○ Additional Attribute 4
		  ○ Additional Attribute 5
		  ○ Aux1
		  ○ Aux2
		  ○ Aux3
		  ○ Business Unit
		  ○ Coverage Type
		  ○ Coverage Model
		  ○ Customer Size
		  ○ City
		  ○ County
		  ○ Country
		  ○ Geography
		  ○ Geography High ID
		  ○ Include Hierarchy
		  ○ Item
		  ○ Inventory Organization
		  ○ Industry
		  ○ Partner
		  ○ Province
		  ○ Postal Code
		  ○ Product Group
		  ○ Sales Channel
		  ○ Sales Subchannel
		  ○ State
		• Description
		• Function
		• Name
		• Owner
		• Parent Territory

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Forecast Participation Code • Function • Last Updated By • Last Updated Date • Leaf Territory • Line of Business • Name • Owner • Parent Territory • Parent Territory Number • Parent Territory Unique Number • Partner (Name, Partner Number, Primary Address, Public Address ID, Public Email ID, Public Fax ID, Public Phone ID) • Partner ID • Resource o Forecasting Delegate o Team Member Function • Source Territory • Team Members (Name, Primary Email, Primary Phone) • Territory ID • Territory Number • Type • Unique Territory Number	• Parent Territory Number • Parent Territory Unique Number • Partner ID • Resource o Forecasting Delegate o Team Member Function • Source Territory • Territory ID • Territory Number • Type
Work Order	• Assignee Party Name (Name, Primary Email, Primary Phone) • Case Category ID • Case Message • Case Number • Case Opportunity (Name) • Case Resource (Name, Primary Email, Primary Phone) • Closed Date • Contacts (Name, Primary Address, Primary Email, Primary Phone) • Created By • Creation Date • Description • Favorite	• Case Number

Business Object	Fields Enabled for Use as Filters	Fields Enabled for the Search Box
	• Last Updated By • Last Updated Date • Open Date • Primary Contact Party ID • Queue ID • Reported by Party Name (Name, Primary Email, Primary Phone) • Title	

Compare the Active Adaptive Search Configuration to the Previous One

You can generate a spreadsheet that compares any changes made to the current active adaptive search configuration against the last published default configuration.

For example, you select the business objects you want to enable in Adaptive Search on the Quick subtab and click **Publish** to enable the adaptive search configuration provided by Oracle. For custom objects, the default configuration won't have any custom object configuration details.

You can modify how search operates on the Setup Advanced tab of the **Configure Adaptive Search** page. For example, you can specify which fields of an object and its related objects can be used in searches and displayed as search filters. Because Oracle configures the fields for you, setup is optional unless you want to enable search on custom child objects and fields, or to change Oracle's default search configuration. You must run the Publish process for your changes to take effect.

Generate Adaptive Search Comparison Report

Before you run the Publish process, you can view and compare all the attributes for the custom objects in addition to any entities enabled or disabled in the unpublished configuration.

You must have the ZCA_ADAPTIVE_SEARCH_CONFIG_PUBLISH privilege to generate a comparison spreadsheet for your currently active Adaptive Search configuration against your default configuration.

1. From **Setup**, click **Advanced**.

   From here you can change which objects and fields are enabled for search, how they are searched on, and other search configurations. You can also enable and disable objects for searching.
2. From the **Actions** menu, select **Compare with Previous Configuration**.
3. From the **Compare with Previous Configuration** dialog, under Records, select either **Modified** or **All** options.
4. Next, select one of these Adaptive Search configurations options:
   - Unpublished Configuration
   - Active Configuration

   to compare against one of these configurations:

- Active Configuration
- Default Configuration

5. Click **Export** to download the comparison data from Adaptive Search as a CSV file. You can then use this file to view or analyze your data offline.

The spreadsheet contains a separate tab for each object and displays a list of attributes for each object in the current configuration. The first column displays the name of the Attribute, the next four columns shows the Boolean values for the current configuration and the next four columns shows the Boolean values of the default configuration.

3 Create Saved Searches

Overview of Saved Search Setup

Here's an overview of how you can create saved searches for different roles in your organization.

Step	Description	Navigation	Where to Get More Details
1	If you haven't already, review the list of fields available in Adaptive Search and make changes before you create saved searches.	N/A	*Adaptive Search Configuration Provided by Oracle*
2	Create saved searches for different job roles in the sales organization.	On any list page	*Create Saved Searches for the Sales Organization*
3	Share the saved searches with the appropriate job roles in the organization.	Click in the search field in the list page and select **Manage Saved Searches**.	*How do I share a saved search with everyone or with specific job roles?*
4	Specify which saved search appears by default when a user opens each work area.	Click in the search field in the list page and select **Manage Saved Searches**.	*Specify Which Saved Search Appears for Users by Default*.
5	If the saved search is for a lead or contact, you can specify if you want users to see the first item in the list instead of the list itself.	Click in the search field in the list page and select **Manage Saved Searches**.	*Display the First Record in Leads and Contact Lists*.

Saved Searches Targeted at Different Users

As a sales administrator, you can configure saved searches targeted to different job roles in the sales organization.

> **Note:** The saved searches you create in Digital Sales are identical to those you create in Oracle CX Sales Workspace and work areas powered by Adaptive Search. You can create, delete, and otherwise manage searches in either application, and the saved searches are available to users of both applications.

Configuring the saved searches for each work area involves two steps:

1. Create the saved searches in the landing page for each sales object. When you name your searches, keep in mind that users see them listed in alphabetic order.
2. Use the Manage Saved Searches page to share your saved searches with everyone or with the appropriate job roles. You can configure different lists of saved searches for different job roles, specify the search that runs by default when users open the work area, and you can hide the saved searches provided by Oracle.

While you can configure saved searches for the sales organization, every user can personalize the list of saved searches in each work area for their own use. They can save their current search criteria and their preferred way of displaying search results as a new saved search. Every user can specify which saved search runs by default whenever they open that particular work area. Users can also hide any saved searches they don't want to see.

Review What Searches Are Available for a Sales Object

Here's how to review saved searches available for a particular sales object.

1. Navigate to the appropriate work area landing page. Each business object has its own list of saved searches.
2. Click in the search field and select **Manage Saved Searches** .
3. From the Manage Saved Searches page, **Visible To** list, select **Me**. The Me list includes saved searches you created and haven't shared, the saved searches visible to everyone, and all of the saved searches visible to the job roles assigned to you. Saved searches provided by Oracle are shared with everyone and list Oracle as the owner.
4. Different job roles may have saved searches available to them that won't appear on your **Me** list. To ensure you see all of the saved searches, cycle through all the job roles in the **Visible To** list.

Create Saved Searches for the Sales Organization

Creating a saved search that you can share with the sales organization is as simple as clicking the save button on the landing page.

The new saved search includes not only your current search criteria and keywords, but also your preferred way of displaying and sorting the results. Here are the details:

1. Click **Actions** > **Save** on the list page.
2. In the dialog box, enter the name for your saved search.
3. Click **Save**.

   Your new saved search is now listed in the Manage Saved Searches page. You're now ready to share the saved search with the sales organization. For details, see the topic *How do I share a saved search with everyone or with specific job roles?*.

Manage Saved Searches Page

As a sales administrator, you can use the Manage Saved Searches page to specify saved searches for others in the sales organization. You can also use the page to maintain your own list as does any other user, as described in the Using Digital Sales guide.

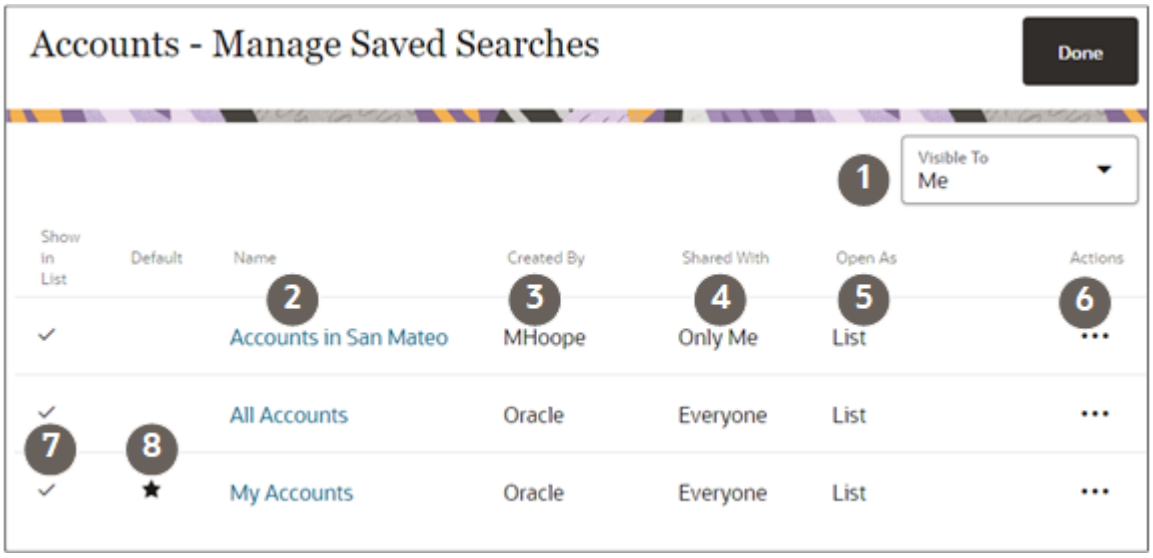
Here's what you can do on the Manage Saved Searches page:

- Share saved searches you created.
- Remove from use any saved searches provided by Oracle that you don't need. You can't delete the saved searches Oracle provides, but you can unshare them.

- Specify which saved search appears by default when users navigate to the work area.
- Delete any saved searches you created.
- Create different lists of saved searches for different job roles.
- For contacts and leads, you can choose to display the first record in the list rather than the list itself.

Here's an annotated screenshot to give you an overview:

Callout Number	Column	Explanation
1	Visible To	Access the different lists of saved searches for different job roles. Each role can have its own configuration.
2	Name	Clicking on the name of the saved search displays the search results.
3	Created By	You can only delete saved searches created by your organization. You can't delete saved searches created by Oracle, but you can unshare them so they're visible only to you.
4	Shared With	Saved searches you create are personal (Shared With Only Me) unless you share them.
5	Open As	**List**: The saved search displays results as a list. For lead and contact saved searches only, you can instead open the first record in the list (**Detail**).
6	Actions	The **Actions** menu (three dots) displays the available actions for each saved search.
7	Show in List	Indicates if the saved search is visible or hidden from you when you put your cursor in the search field on the landing page.
8	Default	For each list of saved searches, you can specify a different saved search to run by default when users open the landing page. Users can always specify their own default.



How do I share a saved search with everyone or with specific job roles?

You can configure the saved search setup to specify the saved search that appears by default whenever a user opens the work area. You can also setup saved searches to share with everyone or to share with each specific job role.

After you create a saved search, it's initially visible only to you. Here's how to share it with the whole sales organization or with individual job roles.

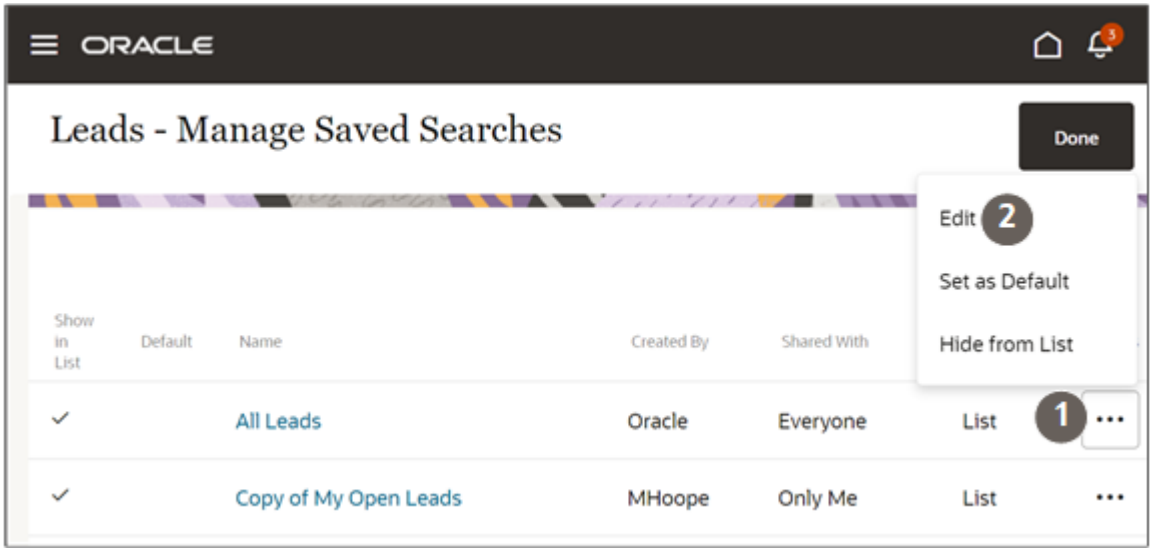
1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me**.
4. Click **Actions** (the three dots in the Actions column) for the saved search you want to share and select **Edit**.
5. Make a selection from the **Shared With** list:
    - If you're making the saved search available to the whole sales organization, select **Everyone**.
    - If you're making it available for specific roles, here's how to add them:
        i. Select **Specific Roles**.
        ii. Click **Add**.
        iii. Select the role.
        iv. Click **Save** (the check mark icon).
6. Click **Save**.

If you shared the saved search with job roles that aren't assigned to you, then the saved search is no longer visible on your page. To see it, select one of the job roles assigned to it from the **Visible To** list.

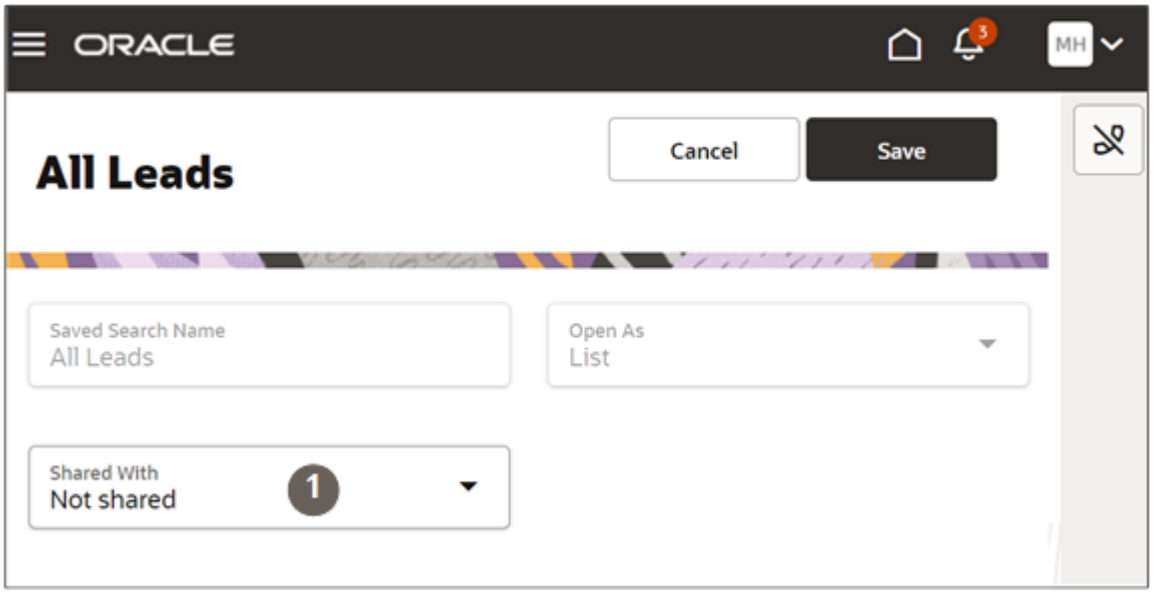
Remove a Saved Search from Use by Unsharing It

As an administrator, you can remove saved searches from use entirely by unsharing them. Doing so removes them from the lists of saved searches for all users except yourself. Use this method to remove from use any saved searches provided by Oracle that you don't need.

1. Place your cursor in the search field on the landing page and select **Manage Saved Searches**.
2. On the Manage Saved Searches page, click **Actions** (the three dots) for the saved search you want to remove, and select **Edit**.



3. On the edit page, click **Shared With** and select **Not shared** (callout 1 in the screenshot).



4. Click **Save**.

The saved search is now visible only to you. It's removed from use for the entire organization.

Specify Which Saved Search Appears for Users by Default

For each business object, you can specify the saved search that appears by default whenever a user opens the work area. You can specify different defaults for each job role.

1. Navigate to the work area.
2. Click in the search field and select **Manage Save Searches**.
3. From the **Visible To** list, select the job role where you want to define the default.
4. Click **Actions** (the three dots in the Actions column) for the saved search and select **Set as Default**.

Rename a Saved Search

You can rename saved searches you created. Saved searches are listed in alphabetic order for users when they put their cursor in the search field.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me** to see the lists that you shared with everyone and those you haven't shared yet. If you shared the list with a specific job role, and that job role isn't assigned to you, then you must select that job role to see the saved search that you want to rename.
4. Click **Actions** (the three dots in the Actions column) and select **Edit**.
5. Enter a new name.
6. Click **Save**.

Delete a Saved Search You Created

You can delete saved searches you and other administrators created. Your action deletes the saved search for every role where it is shared. You can't delete saved searches provided by Oracle, but you can hide them.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me** to see the lists that you shared with everyone and those you haven't shared yet. If you shared the list with a specific job role, and that job role isn't assigned to you, then you must select that job role from the list to see the saved search you want to delete.
4. Click **Actions** (the three dots in the Actions column) and select **Delete**.
5. Click **Save**.

Display the First Record in Leads and Contact Lists

For contacts and leads only, you can display the first record in the list rather than the list itself. Salespeople then work through the items in the list by clicking **Next** to get the next record. You can specify a different default for different job roles.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, make a selection that matches how the list is shared. For example, if the list is shared only with Inside Sales Representatives, then select that job role.
4. Click **Actions** (the three dots in the Actions column) for the saved search and select **Edit**.
5. In the **Open As** field, select **Detail**.