

**Oracle® Universal Work Queue**

User Guide

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Oracle Universal Work Queue User Guide, Release 12.2

Part No. E48979-02

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# Send Us Your Comments

## **Oracle Universal Work Queue User Guide, Release 12.2**

### **Part No. E48979-02**

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and [www.oracle.com](http://www.oracle.com). It contains the most current Documentation Library plus all documents revised or released recently.

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# Preface

## Intended Audience

Welcome to Release 12.2 of the *Oracle Universal Work Queue User Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area
- Oracle Universal Work Queue
- Oracle Applications
- The Oracle Applications graphical user interface

To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

## Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Structure

- 1 Product Description
- 2 User Procedures

## Related Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Universal Work Queue.

## Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

## Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available

on My Oracle Support.

## **Guides Related to All Products**

### **Oracle E-Business Suite User's Guide**

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

## **Guides Related to This Product**

### **Oracle Advanced Inbound Telephony Implementation Guide**

Oracle Advanced Inbound Telephony enables telesales and teleservice agents and collectors to route, queue, and distribute callbacks for customer calls received over the phone and the web. It enables computer telephony integration to third-party telephony platforms. You can also transfer or conference a call and its application data from one agent to another.

### **Oracle Advanced Outbound Telephony Implementation Guide**

Oracle Advanced Outbound Telephony provides multiple automated dialing methods and extensive list management controls that improve the penetration and efficiency of outbound calling campaigns and maximize the productivity of interaction center agents. It integrates with Oracle Customer Interaction History to provide feedback that marketing professionals can use to analyze and measure the success of the marketing campaign.

### **Oracle Interaction Blending Implementation Guide**

Oracle Interaction Blending is a server that enables you to receive and make calls over the web and telephone according to your service plan. A service plan specifies inbound and outbound service levels and minimum agent availability for the service level. Inbound service levels specify the percentage of inbound calls that will be answered within a time threshold whereas outbound service levels specify the number of transactions that you can make within a time period.

### **Oracle Interaction Center Server Manager Implementation Guide**

Oracle Interaction Center Server Manager is the Java server process that runs on every Oracle Interaction Center machine. It enables you to balance load by creating server groups and configuring multiple server processes for them or assign servers to a standby system of nodes that you create by installing and running Oracle Interaction

Center Server Manager on computers. You can add IP addresses to a node, refresh parameters of servers and server groups while the server is working, and use the Unit Test Server utility to test the validity of the CTI and switch integration. This guide also describes how to diagnose and troubleshoot operational issues.

### **Oracle TeleSales Implementation Guide**

This guide describes how you can set up Oracle TeleSales so telesales agents can convert a sales inquiry or a customer call into an order. You must set up agent and customer interaction tracking, enable web directory assistance for agents, enable web collaboration, set up opportunity forecasting so agents enter forecast amounts for a product line and receive sales credits, and set up marketing source codes to track the marketing activity responsible for a sale or a sales activity. Oracle TeleSales interacts with Oracle Scripting, Oracle Email Center, Oracle Marketing, Oracle Territory Manager, Oracle Product Hub, Oracle One-to-One Fulfillment, Oracle Universal Work Queue, Oracle Sales, and Oracle Quoting.

### **Oracle TeleSales User Guide**

Oracle TeleSales enables telesales agents manage the sales cycle, from prospects to booked orders. It offers a multi-channel selling solution that leverages all sales channels: whether selling over the phone, through the web or through mobile devices. Its E-Business Center offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for a comprehensive customer view. You can use Oracle TeleSales for comprehensive customer management, list generation, lead, opportunity, and pipeline management, quote and order generation, event registration and collateral fulfillment.

### **Oracle TeleService Implementation and User Guide**

This guide provides information on how to use Oracle TeleService. Oracle TeleService automates the call center and the resolution process from the time a customer calls in, sends an email, or enters a service request on the Web. Agents can use Oracle TeleService to update customer records, validate product ownership and contract coverage, provide proactive and personalized customer service, and resolve problems that arise from the initial contact using a knowledge base.

## **Installation and System Administration**

### **Oracle Alert User's Guide**

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

### **Oracle E-Business Suite Concepts**

This book is intended for all those planning to deploy Oracle E-Business Suite Release

12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

### **Oracle E-Business Suite CRM System Administrator's Guide**

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

### **Oracle E-Business Suite Developer's Guide**

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

### **Oracle E-Business Suite Installation Guide: Using Rapid Install**

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

### **Oracle E-Business Suite Maintenance Guide**

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

### **Oracle E-Business Suite Security Guide**

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

### **Oracle E-Business Suite Setup Guide**

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling

Oracle Applications Manager features, and setting up printers and online help.

### **Oracle E-Business Suite User Interface Standards for Forms-Based Products**

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

## **Other Implementation Documentation**

### **Oracle Approvals Management Implementation Guide**

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

### **Oracle Diagnostics Framework User's Guide**

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

### **Oracle E-Business Suite Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

### **Oracle E-Business Suite Integrated SOA Gateway Implementation Guide**

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

### **Oracle E-Business Suite Integrated SOA Gateway User's Guide**

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

## **Oracle E-Business Suite Multiple Organizations Implementation Guide**

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

## **Oracle e-Commerce Gateway Implementation Guide**

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

## **Oracle e-Commerce Gateway User's Guide**

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

## **Oracle iSetup User's Guide**

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

## **Oracle Product Hub Implementation Guide**

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

## **Oracle Product Hub User's Guide**

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed

includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

### **Oracle Web Applications Desktop Integrator Implementation and Administration Guide**

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

### **Oracle Workflow Administrator's Guide**

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

### **Oracle Workflow Developer's Guide**

This guide explains how to define new workflow business processes and customize existing workflow processes embedded in Oracle E-Business Suite. It also describes how to define and customize business events and event subscriptions.

### **Oracle Workflow User's Guide**

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

### **Oracle XML Gateway User's Guide**

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

### **Oracle XML Publisher Administration and Developer's Guide**

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing

Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

## **Oracle XML Publisher Report Designer's Guide**

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

## **Training and Support**

### **Training**

Oracle offers a complete set of training courses to help you master your product and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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

### **Support**

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

## **Do Not Use Database Tools to Modify Oracle E-Business Suite Data**

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

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

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

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

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# Product Description

This chapter covers the following topics:

- Features
- Concepts

## Features

Universal Work Queue is a flexible work presentation and access tool that provides centralized view and access to work. An agent can view, request, receive, access and organize work, which enables efficiency and productivity.

Universal Work Queue integrates work from different work sources (application and media) and supports different work methods. It addresses work requirements for multi-skilled agents and agents for whom work is queued. For example, multi-skilled agents handle work that is distributed across many different work item types and across business applications while other agents only handle and act on work that is delivered to them.

Work that originates from a business application, for example, Oracle TeleSales or Oracle TeleService is considered an application work item. Business applications are process centric and provide work management tools necessary to complete the work. Some application work items (i.e., tasks) exist only in the context of the other application objects (e.g., service request task is created to track tasks that are associated with the resolution of the service request).

For multi-skilled agents – those whose job entails many different functions such as combined sales and support -- work is distributed across many different work item types that cross different application products. This makes work difficult to manage and track. The application work management component creates silos that "hides" work from agents.

## Ability to Access Different Forms of Work from Different Sources

Work comes in many forms. As a work access tool, UWQ supports different sources of

work. There is application work generated internally by organization requirements, externally by customers using self-help channels and through the Interaction Center through phone, e-mail and web collaboration requests.

UWQ integrates media channels that bring external work in the form of customer interactions into the eBusiness suite. These media channels are external work sources and queues that present special real-time and media control requirements such as inbound telephone queues and e-mail.

Application work is work created or completed through self-help channels (such as web sites), field organizations, events and store fronts, and completing media channel work.

## Support for Different Forms of Work Methods

Business applications are designed to address users' target work methods (e.g., OTS supports telesales agent process which tend to be driven off of queues and targeted to meet service levels). Sales Online is targeted at the self-directed field agent who manages territories and accounts on a my personal basis.

As the single point of work access, UWQ must support different work methods driven by organization business rules, application processes and the different roles agents may play. UWQ supports the full range of eBusiness work methods that lie between the two extremes of "heads down worker" who is directed to queued work executed in priority order and the self-directed agent who manages, organizes and prioritizes his own work and work day.

In its simplest utilization, it provides a view and access to all work items and gives agents work organization tools such as seeded nodes that segment by work item type and work item attributes, as well as sorting and filtering so that agents may narrow their focus and set work priorities. In this sense It provides a stable, persistent page agents can use to launch work into an application and return to for the next work item.

To reduce the navigation effort and time necessary to complete simple work processes, UWQ supports Quick Actions which allow agents to perform minor updates such as setting work status or reassigning work on one or several selected work items. This provides additional details to help the agent make a better informed decision and focus on progressing through a set of work and still allows them to open some work items into the application to execute more complex efforts.

UWQ now supports work distribution. This addresses the problem of how to queue and distribute unassigned work items in priority order to the next available qualified agent. Push distribution, which assigns work items to agents based on territory or other criteria cannot fairly distribute work load across enterprise agents. Manual distribution is too cumbersome and expensive and automated distribution is often inefficient in the delicate balance of work complexity, value, and other intangible considerations. Queued work distribution fairly disseminates work. (Over the long term of days, weeks or months.)

Features include:

- Centralized agent workplace
- Queued work distribution and delivery
- Work repository
- Plug-in Support for icWork Controller
- Flexible media screen pop configuration and support
- Flexible application work item, launch configuration and support
- Application and Interaction Integration
- Session Information
- Administration, Configuration, and Diagnostics

Through integration with Oracle Interaction Blending, agents are moved between media queues based on service levels for the interaction center.

## Concepts

Universal Work Queue is a framework for accessing, organizing and acting upon different types of work generated in an interaction center. UWQ supports two types of work: media and application. Work that originates from an Oracle Application, such as a service request or task is called an application or non-media work item. Work that originates from a customer contact channel, such as a telephone call is called a media work item. In addition to the types of work UWQ supports, it also supports different work methods including: queued media access, queued work access, browse and select, alerts and distribution of work.

Concept topics include:

- Agent Workplace, page 1-4
- Work Selector, page 1-5
- Quick Filters, page 1-6
- Work Summary Panel, page 1-6
- Work Panel, page 1-8
- icWork Controller, page 1-8
- Phone Tab, page 1-10

- Notice Tab, page 1-10
- Phone Extension Window, page 1-19
- Screen Pop, page 1-11
- Interaction Blending, page 1-11
- Refresh Strategy, page 1-11
- Work Repository, page 1-13
- Work Source, page 1-13
- Work Item, page 1-14
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- Work Assignment, page 1-14
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- Queued Work Access and Distribution, page 1-15
- Media and Work Launch Strategies, page 1-15
- Media Action Association - Media Screen Pop, page 1-11
- Work Launch Rules for Application Work, page 1-20
- Navigating within Universal Work Queue, page 1-16

## Agent Workplace

The Agent Workplace is the desktop user interface for Universal Work Queue and serves as the central portal for agent work access. It is a Forms application and displays media and application work nodes and summary items, launches work into the appropriate application form, and provides work access controls. From it, you can browse through work sources, organize work summaries, select and open work items, or view work item details and execute quick actions upon selected work items.

You can use work access controls to request queued work or media contacts and to open selected work items. Features include: UWQ cascade and tree navigation of nodes, work selection, the work panel for quick actions and quick filters to organize work.

The agent workplace is divided functionally into five major regions: Configuration and Work Access Controls, Work Selector, Quick Filters, Work Summary Panel, and the Work Panel.

## Workplace Configuration and Work Access Controls

The Workplace provides special menu options and toolbar icons that allow you to configure the workplace and control work items selected within the Workplace.

### Configuration Controls

Using profile options, your site administrator, your supervisor or you may determine which work item types and customer channel sources are always available. From within the Workplace you may also change the work selector style (either as a tree along the left side of the Workplace or as a cascading menu at the top). From the tree work selector you may:

- show or hide node counts
- show, hide or set the display order of work nodes
- refresh individual nodes or subnodes

### Work Access Controls

Work Access Controls allow you to request work from a selected customer channel or open a selected work item. You may also request, reschedule or complete work. There are work access controls that quickly clear or reset quick filters, to refresh work information, and to reset the current application and customer channel interaction state.

## Work Selector

The work selector in the agent workplace presents you with an overview of your workload. Work is organized into nodes (work providers) by work type (for example, Tasks, Leads, or Service Requests or customer channel, such as inbound call, outbound campaigns, or email). Some nodes comprise more specific work item types such as types such as "My Leads" or "My Teams Leads". Most nodes are further segmented into sub-nodes by attributes, such as application work type status, age or ownership. Some nodes have several sub-node segmentation tiers.

The tree work type selector displays along the left side of the workplace. It provides a quick overview of workload and its organization. The tree selector also enables you to turn counts on and off and to control the display and order of nodes.

The cascading work type selector displays as a drop down menu at the top left of the workplace, just below the menus and toolbars. It is more compact and affords a greater display area for the work summary panel. While it does not provide a complete hierarchy of all work items, it is more compact and somewhat easier to navigate.

**Note:** Certain functions cannot be performed from the cascade work type selector. They include: count refresh, hide counts, display or hide nodes, and change node order.

Your administrator may set the default (startup) display for the Work Selector. During

your session you may use the Switch Display control to toggle the work selector display (tree or cascading).

## Quick Filters

Quick Filters allow you to further refine and narrow the focus of work items displayed in the Work Summary Panel beyond the seeded work node segmentations. Not all application work item types support quick filters, and your administrator must configure your responsibility and nodes to activate quick filters.

When present, quick filter controls display across the top of the workplace, just below the menu and toolbars and to the right of the cascading work selector. Use the drop down filter control to set the attribute filter values, then press the Quick Filter apply button at the far right of the quick filter area. Once applied, Quick Filters remain in effect for the duration of the current session or until you change them; Quick Filters revert to the default setting at the start of each session.

Administrators may set a default Quick Filter value for each quick filter attribute. Use the "Default Filter" control or Tools->Default Filter to revert to the node's default Quick Filters. Use the "Clear Filter" toolbar icon of the Tools->Clear Filter to remove the current node's filters and view all work items unfiltered.

**Note:** Use Node Counts. Node counts always show the current qualified work items for a given node regardless of applied filters. It is possible to set filter criteria the exclude all current work items. In the course of your work, you may close all of the qualified work that meets the current filter criteria.

## Work Summary Panel

The Work Summary Panel lists summary information for work items. It allows an agent to view, organize, and sort qualified (open work for you or your groups). Not all work is immediately actionable. Some work is in a sleep state. It presents qualified work items in row format. Key work item information, for example, type, status, and displays in column format. The work summary panel is always present and will contain work item summary information when a node is selected and the node contains data. Each node presents different information within the work summary panel because of different work types and different node purposes. The information that appears for tasks will be different from that which appears for service requests. The same is true for group nodes versus individual nodes and owner versus assignee nodes. The use of quick filters may further refine and narrow the focus of work items that appear in the work summary panel beyond the seeded work node segmentations. Not all application work item types support quick filters.

The key functions of the work summary panel are:

- ability to review work items

- select work
- organize work
- view and act on one or more work items (when Work Panel is present)

From the work summary panel, an agent can:

- configure the display of information in the nodes
- hide or display information columns
- change column order
- apply filters
- save the display attributes across work sessions
- perform ad hoc changes to display attributes
- perform a quick sort on a single attribute
- toggle between ascending or descending sort order
- perform an ordered sort of one, two, or three columns simultaneously
- save individual or multi-attribute sort orders
- select a work item and open the item using the Get Work access control or by double-clicking the work item
- perform a search of work items in the work summary panel
- refresh the work summary panel

**Note:** Each attribute may be independently sorted in ascending or descending order.

**Note:** Saved settings last between session until you either change, save, or clear the new or customized settings.

**Note:** Not all application work item types support quick filters. Your administrator must configure your responsibility and the nodes to activate the quick filter functionality.

## Work Panel

The Work Panel allows you to perform quick actions on selected work items. It presents additional information in the form of special instructions, extended information, and detailed information about the work item selected in the Work Summary Panel.

The Work Panel is divided into three areas:

- **Special Instruction Area** - Displays special instructions based on work item attributes such as "customer is in collections." The objective is to present additional information to help you better understand the work item and if and how you should act upon it.
- **Extended Information Area** - Displays additional information gathered from other sources and linked together. This provides access to large amounts of information such as notes.
- **Action Area** - Allows users to select and execute actions on selected work items. It presents additional details and allows users to enter or change parameter values. The actions listed vary depending on the work item, the node configuration and the number of work items selected. The details and parameters vary depending upon the selected action, the node configuration and the number of work items selected.

Each display element in the work panel is configured independently, based on responsibility.

When present, the Work Panel appears in the lower-half of the Agent Workplace (beneath the tree work selector and the Work Summary Panel).

Not all nodes provide work panel actions; some application work item types do not include work panel information and actions the work panel and your administrator may configure nodes to access the Work Panel.

## icWork Controller

The icWork Controller is an independent window that provides a quick and easy way to control media items and monitor and control work state.

The icWork Controller consists of three parts:

- An icon toolbar and menu options allow you to control the controller display, your media and queued work requests and break status.
- Plug-in controllers that allow you to control real time services such as the softphone and the Notice control. These are tabbed inserts that take up most of the icWork Controller.
- Media access and work status timers at the bottom of icWork Controller.

The icWork Controller has two displays sizes if tabbed plug-ins are present: full size allows you to view and access all plug-in controller features and collapsed which minimizes the icWork Controller to show only the toolbar, menu and media access and work status information. If no plug-ins are present, the icWork Controller will display collapsed.

The features of the icWork Controller depend upon your configuration and current working status. The following is a list of the features and the configurations and work status that active them:

## **Softphone**

The softphone is a plug-in tab that is present if you are configured for any telephony services, inbound, outbound or web callback. The softphone may not be usable if it cannot connect with UWQ Server, the OTM Server, or some of the supporting telephony services.

### **Notice Controller**

The notice controller is a plug-in tab that is present if you are configured to receive notices. Use the notice controller to read and manager your notices.

### **Work Access Toolbar Icons and Menu Options**

You may control your session status and outstanding work requests using toolbar icons and accessible Action menu options on the icWork Controller.

There are four types of work access controls:

- Call control icons and Action menu options. Call control icons are present if you are configured for inbound, outbound or web callback queues. You must initiate a call request by selecting a media source and classification and executing "Get Work" from the agent workplace to enable the controls on the icWork Controller.
- Queued Work Access icon and Action menu option. If you are configured for queued work Distribution and Delivery the "Next Work" icon and Action menu option are available.
- Break Control Icon and Action menu option. If you are configured for Session History tracking, then the icWork Controller activates its Break Request toolbar icon and Action menu option. There is an additional break change reason icon present in the status information area if you are on a break. The change break reason icon is enabled in the lower right hand corner of the icWork Controller.
- icWork Controller Sizing Control. This toolbar icon and Action menu option allow you to collapse and expand the icWork controller if there are plug-ins present.

### **Session Status**

The icWork Controller shows your current media source and working status and time at the bottom of the controller.

## Phone Tab

The softphone allows users to view call information and to control the call. Use the Phone tab to:

- Initiate (dial) a call.
- Place an active call on hold.
- Retrieve a call from hold.
- Hang-up an active call.
- Transfer a call to another agent.
- Conference another agent into an existing call.
- View call information such as call classification or campaign, customer information or IVR activities.
- View call state, for example, which line is ringing on hold.

## Notice Tab

The notice control is a plug-in tab to the icWork Controller that allows you to read and manage one notice at a time. As you receive notices, the UWQ Notice schema retains all open notices. They are available in the notice controller as a set (or list) in the order you received them from most recent to oldest. The Notice control allows you to act upon and filter notices.

Using the notice controller you may:

- Read the current notice.
- Launch or open a related work item if the notice includes special work item information. Not all notices are related to a specific work item or include the special work item information.
- Navigate through your notices, step forward or backward and jump to the oldest or newest notice.
- Filter notices by age. A special filter allows you to view only new notices.
- Acknowledge notices. Once you have read a notice, acknowledge it so it does not appear with the new notices filter.
- Close a notice, once you have completed its task, so that it no longer appears in any of your notice lists.

- Check for new notices or refresh you notice list to apply a new filter.

The Notice controller supports two refresh strategies. Automatic refresh checks for new notices at regular intervals configured through profile options by your administrator. Manual refresh requires you to check for new Notices using the Refresh button on the Notice Controller. You may always use Refresh to check for new Notices, to refresh the current filter list after acknowledging or clearing notices or to apply a new filter.

## Screen Pop

A screen pop presents a fully populated application form or search screen based on media (call) information. Because the screen pop and phone call arrive nearly simultaneously you can begin helping the customer almost immediately. Universal Work Queue works with the application and customer channel to effect the screen pop. If you do not receive the screen pop immediately, use the softphone call information to start your conversation with the customer.

When you receive an interaction from a customer channel, Universal Work Queue launches the appropriate application form and delivers the media information (call information) to the application. The application populates the form with customer or work information or both.

## Interaction Blending

Interaction Blending integrates work from different customer channels, based on defined service level rules (e.g., length of time a customer waits on an inbound call) and the number of agents available to handle the interaction. When Oracle Interaction Blending is enabled, a blending work source appears in the work selector. Each time you request a blending work item, blending considers your skills and where they are most required.

Through Universal Work Queue, Interaction Blending supports both inbound and outbound telephony and may blend across inbound classifications. Once blending assigns you to a work source it tries to continue giving you work from that source; however, if you are needed on another work source, blending will move you. For example, if a flood of inbound calls arrives around lunchtime, you may move from an outbound campaign to an inbound classification to help out; later blending may move you back to the outbound campaign.

## Refresh Strategy

For Universal Work Queue to provide up-to-date work information, including counts for all work and channel types, it must refresh its counts and other information from the work source.

The following table describes the refresh methods.

Refresh Method	Description
Work Selector (Tree View)	Refreshes both the counts and contents for an active work node.
Node and Sub-Node Refresh	This refresh method allows you to manually update any work source node and sub-node counts and contents from the work selector tree.
Work Summary Panel Refresh	This method allows you to manually update and refresh contents by right-clicking in the work summary panel or by applying a filter.

**Note:** You cannot perform node or sub-node updates from the cascading work selector. You may or may not be enabled to refresh nodes and sub-nodes through the work selector tree depending on how you are configured.

The following are the refresh styles for Universal Work Queue.

Refresh Style	Description
Automatic Refresh	A full refresh is performed when you request the next work item. Most users do not need refresh updates so frequently and it can detract from their work flow. Therefore this setting is not recommended.
Refresh on Login	UWQ only performs a refresh on startup to get counts for all work nodes. You must use manual refresh for updates during the rest of your session.
Manual Refresh	You must manually request a refresh when you need to obtain the current counts.

**Note:** Typically users need to refresh at the start of their session, when they return from break, after a rush of work (for example after a number assignment notices), or after an hour or two of continuous work. Therefore, most users are configured for refresh on login or

manual refresh.

## Work Repository

The work repository is a central schema for all work items that are generated by an Oracle E-Business subscribing applications (such as Service Requests and Tasks). It is a core component of the queued work distribution. It facilitates the enforcement and achievement of service level goals by delivering work items to the appropriate agent, in priority order.

For work items to be maintained within the repository, the business application must subscribe to the framework component. The business application owns the work item within their schema (service request or task) and is responsible for the creation, updating and deletion of work items. For example, when you open a service request, all of the inherent information associated with the service request (history, activity, etc.) is maintained within the schema for the work item. The business application maintains the work reference within the repository. Universal Work Queue provides global prioritization capability that the business applications use to translate the internal work item priority to a standard Universal Work Queue global priority, which is applied across all work items types.

The work repository provides a single source for work access, management and distribution. This allows quick and easy access to information as well as facilitating the application of complex distribution rules across different work types. For example, a task created from a service request is representative of an inherent work item. The service request represents the parent entity while the service request task represents the child entity. The service request task is inherently linked to the service request. In the example provided, the quick access benefit of the work repository ensures that the service request task will not be distributed before the service request. It also allows for applying a priorities-based order, common to all work for an agent or group, even work of different types. Because the repository maintains work distribution, it enforces accountability (See Queued Work Access).

## Work Source

A work source identifies a unique work item type and its work distribution rules, delivery mechanism, and may establish work relationships. There are two types of work sources, primary and association work sources. Primary work sources are based on a work item type, such as a service request. The association work sources are based on work relationships. The association of the work source ensures that the service request task is distributed with the same rules as service requests with the addition of the parent-child distribution rules, such as closing service requests tasks before or at the same time as the service request.

**Note:** In Universal Work Queue, association work sources only apply to

tasks with a primary work source, that is, a service request task.

There are three work sources in Universal Work Queue.

- Tasks
- Service Requests
- Service Requests Tasks

## Work Item

A work item is a commonly referred to as a business transaction that involves a user or a resource of a particular type in the organization having a specific role or responsibility and the relationship with some form of work that may or may not involve a customer interaction depending upon the nature of the work being front office or back office. For example, task, service requests, service requests tasks.

## Work Assignment

Universal Work Queue can present all of your work. However, if you are not properly configured you may miss seeing some work. Work assignment explains how and why Universal Work Queue presents work items.

Work is organized into seeded nodes by work type. In order to see an assigned work item, your supervisor or administrator must configure you to access the work node. Customer channels are special work sources that queue and deliver work when you request it. Application work items are assigned to you or a group through a number of means:

- automatically through Assignment Manager and territories
- manually when another user assigns a work item
- automatically as the creator of the work item
- distributed on request from a queue

Work may either be assigned to you or owned by you. Assignment means you are responsible for completing the task, ownership means you are responsible for managing the task and making sure it is completed. Only tasks may be assigned and tasks may also be owned. All other work items, such as service requests, leads and opportunities are owned.

Work may either be assigned to or owned directly by you, so you are personally responsible for it. Work may also be assigned to or owned by a group to which you belong. Universal Work Queue provides a full view of all work, whether owned or assigned directly to you or to a group.

## Work Delivery

Work delivery is the process of launching work so that it can be acted upon.

## Queued Work Access and Distribution

Queued work access assembles a set of work items you qualify for based on your group memberships and assigned Work Sources.

Work within the queue is ordered by work item priority and scheduled date. You access work by requesting it from the queue. There are two queue access methods:

- **Queued Deliver and Distribute:** This delivers the next work item you qualify for in priority and schedule order by launching the appropriate application. If the highest priority work item has not been distributed, it is distributed to you before delivery. Otherwise you receive a previously distributed work item. If you have privileges, you may configure the Work Sources included in your distribution and delivery request.
- **Queued Distribution Only:** Queued work distribution assigns (distributes) an administrator configured amount of work upon request. When working in queued distribution mode, you request work from the queue. After the work is distributed, you manage it through the agent workplace nodes. This allows work to be distributed to agents upon request in priority order while allowing you to manage your assigned work priorities.

Your administrator may configure you for one, both or none of these queue access methods.

You may control access to the queue by configuring the Work Sources included in (or excluded from) a work request if your administrator grants you this privilege.

Queued work access and distribution replaces the 'pooled' worklist functionality. Queued work provides the same prioritization and delivery advantages and adds accountability through work distribution and the flexibility to request work without immediately opening it into an application.

## Media and Work Launch Strategies

Launching refers to the opening an application form and populating it with the selected or delivered work item.

**Note:** A work item may also pertain to a customer TCA record (Party).

The launch strategy associates the proper work item with the proper application based on work item type or classification and agent skills and responsibilities.

Launching occurs when:

- an agent opens an application work item (Get Work) in browse and select mode
- queued work delivers a work item
- agents launch a work item from the Notice Control
- when agents receive or answer an inbound call; this is called a "media screen pop."

## Media Action Association - Media Screen Pop

Media screen pop configuration associates a launch rule with an application form through a launch function. Responsibility has been added to the existing launch rule.

Launch rules may be configured with a hierarchy of default values. This provides the flexibility to apply the most common actions and create default behaviors on anticipated situations and specialized application pops for special handling. By configuring a default application as a "fail-safe" agents will always receive a screen pop and be able to work within an application, even if the call was mis-classified or delivered by mistake.

The key benefit to adding responsibility to media action association is the ability to handle inter-group transfers and misdirected calls. (for example, the customer press '0' and exits out of the IVR). Previously, media actions were mapped at site level. So, if an inbound gold customer calls, the TeleSales agent will launch the eBusiness Center and the TeleService agent will launch the Contact Center. Because of the addition of responsibility mapping, the agent can be mapped to the contact center while the TeleSales agent can continue to receive their calls in the E-Business Center. The new default feature is easy to administer. You can set the TeleService agent to receive all customer party calls and classification in the contact center (even if they are a sales call context) and target specific service requests to launch in to the service request form.

## Navigating within Universal Work Queue

This section provides you with information and shortcuts for navigating within Universal Work Queue.

### Keyboard Navigation

In addition to being able to use the mouse to access and select work nodes and work items, you can accomplish the same tasks through the use of the keyboard.

Shortcut keys provide another means of navigating within the Universal Work Queue user-interface. See Menu Bar and Toolbar, Tools - Keyboard Shortcuts, Actions - Keyboard Shorts, and icWork Controller Keyboard Shortcuts for additional information. When using either the Tab key or Arrow keys to navigate within the interface, fields in which the information is predefined and available for selection only are denoted by a perforated line above and below the field. A blinking cursor appears in fields in which you are able to enter text.

The following table presents keyboard shortcuts for navigating in the Universal Work Queue user-interface.

Function	Shortcut Key
Activate keyboard operation and selection mode	<ul style="list-style-type: none"> <li>• Left Arrow</li> <li>• Right Arrow</li> <li>• Shift + Shortcut key</li> </ul>
Activate keyboard operation and selection mode	Alt
Navigate between menu bar options	<ul style="list-style-type: none"> <li>• Left Arrow</li> <li>• Right Arrow</li> <li>• Shift + Shortcut key</li> </ul>
Exit from a keyboard option	Esc
Exit from a keyboard operation mode	Esc
Navigate between fields in the interface	Tab
Navigate between fields in the interface	<ul style="list-style-type: none"> <li>• Up Arrow</li> <li>• Down Arrow</li> <li>• Right Arrow</li> <li>• Left Arrow</li> </ul>

### Menu Bar and Toolbar

The menu bar and toolbar provide several ways for you to quickly access features and navigate within the Universal Work Queue user-interface. You can perform the following:

- switch responsibility
- clear the current quick filter setting

- reset quick filter settings to the default setting
- refresh all work
- reset an interaction
- toggle the Universal Work Queue display between cascade and Hgrid view respectively
- get work
- stop media work

### Tools - Keyboard Shortcuts

The following table features keyboard shortcuts for functions available from the Actions option on the menu bar in the icWork Controller.

Function	Shortcut Key
Refresh All Work	Shift + R
Reset Interaction	Shift + S
Web Availability	Shift + W
Clear Filter	Shift + F
Default Filter	Shift + D
Switch Display to Cascade	Shift + C
Switch Display to Hgrid	Shift + H

### Actions - Keyboard Shortcuts

The following table features keyboard shortcuts for functions available from the Actions option on the menu bar in Universal Work Queue. If media is enabled, media handling actions can be performed from the icWork Controller, including the ability to access action options through the use of keyboard shortcuts.

Function	Shortcut Key
Get Work	Shift + G
Stop Media	Shift + S

### icWork Controller - Keyboard Shortcuts

The following table features keyboard shortcuts for functions available from the Actions option on the menu bar in the icWork Controller.

Function	Shortcut Key
Next Work	Shift + N
Next Media	Shift + T
Stop Media	Shift + M
Break	Shift + K
Collapse	Shift + L

### Phone Extension Window

If you are enabled for media work, then the Phone Extension window may appear when you start Universal Work Queue. If the Phone Extension window appears, enter your assigned telephone extension and number for the teleset then click **OK**.

**Note:** If the Phone Extension window appears and you do not know the teleset number, contact your supervisor.

**Note:** The Phone Extension window will not appear if your user profile has been configured with the teleset number.

### Work Distribution

Work distribution is the process of disseminating work to agents. The distribution of work items can be done using different distribution methods, for example, manual distribution through an Oracle E-Business application or through the Assignment

Manager and Scheduler.

Work distribution assigns work to a single agent who is responsible for completing a task. Work, when first created, is undistributed. There are basically two, distinct distribution models; push and pull. The push model, identifies a qualified agent and assigns the work item to them. In the pull model, an agent either selects or request work from a set of qualified work candidates. An example of the push model is the Assignment Manager, which may be automated through workflows to identify a qualified agent or used manually by a supervisor or co-worker to identify and assign work to an agent. Examples of the pull model include group nodes where an agent may find and select a pooled work item and work queues that distribute work to a requesting and available agent. The queue adds order, necessary to enforce service level rules.

There are two queued work access methods:

- Direct delivery in priority and schedule order, "Next Work"
- Request work

For example, an agent commences work and requests the first priority work item from their queue and works in a continuous fashion, requesting work items from the queue until they take a break or end the work session.

The request work method distributes one or more work items to an agent who then accesses them through work node in Universal Work Queue. This method facilitates the distribution of work to self-directed agents who independently prioritize work assigned to them.

## Work Launch Rules for Application Work

Unlike media channels, which require an associated launch function -- all application work items have a native launch behavior. For example, service requests open into the Service Request form. The work launch feature and functionality allows you to override that default behavior to apply your own work launch application criteria. It is based on the same approach as the media action association. A separate launch association mapping is necessary because application work items use different information for launching work. Within Universal Work Queue, the configuration of application and media work is segregated but the same, basic launch strategies apply to each work type.

- define/specify a launch rule for the application; the rule consists of
  - work item type
  - responsibility
  - task child
- specify/apply launch function

The seeded launch functions are:

- Task launch function
- TeleSales launch function
- Work relationship rules (parent-child work item relationship)

### **Application Work Launch Rules**

The work launch association is optional, you can just accept the default work item launch strategy.

The following lists order in which work launch rules are applied:

1. Is there a work launch rule applied? If yes and the agent's responsibility has appropriate privileges agent will open the work item in the associated form
2. If there is no launch rule applied or the agent does not have responsibility for the associated form, then UWQ attempts to open the work item with the default work item launch strategy. (The agent responsibility must have privileges on the default application form.)
3. FOR TASKS ONLY, UWQ will attempt to launch the task using Task Manager if the launch rule task flag is checked and the agent responsibility is configured to open the Task Manager.
4. If the agent responsibility cannot open the default application form (or Task Manager) then the agent will receive an error message. If this occurs you may either: 1) correct agent's responsibility or 2) add launch association or determine why the agent was wrongfully assigned the work item.



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## User Procedures

This chapter covers the following topics:

- Getting Started
- Work Selector Display Style
- Navigating Universal Work Queue
- Working on Application Work Items
- Configuring Work Sources
- Viewing Work Items in the Work Summary Panel
- Selecting Work from the Work Summary Panel
- Next Work Delivery and Distribution
- Snoozing Work
- Requesting Work
- Getting Work
- Using the Work Panel
- Viewing Notes
- Entering a New Note
- Viewing Work Item Detail
- Assigning a New Action
- Acting Upon a Work Item
- Viewing the Message Panel
- Working on Media Work Items
- Handling Inbound Telephone Calls
- Working on Outbound Campaigns
- Returning Web Callbacks

- Managing Blended Calls
- Viewing Your Email Workload
- Resetting an Interaction
- Using the icWork Controller
- Managing Notices from the icWork Controller
- Work Access Controls
- Viewing Current Activity Status and Timer
- Managing Sessions
- Taking a Break from Your Session
- Ending Your Universal Work Queue Session
- Managing Nodes and Counts
- Hide Node Counts
- Display Node Counts
- Hide a Single Node
- Hide Specific Nodes
- Hide All Nodes
- Display One or More Hidden Nodes
- Display All Hidden Nodes
- Change the Display Order of Nodes
- Refresh Selective Node Counts
- Refresh All Node Counts
- Refresh Individual Node or Sub-Node Counts
- Working with Quick Filters
- Quick Filter Components
- Setting and Applying Quick Filter Criteria
- Clearing Quick Filters
- Restoring the Default Quick Filter

## Getting Started

The Universal Work Queue window displays your work items. Use this procedure to access the Universal Work Queue window.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

For application work:

- You must be defined as an employee in Oracle Applications.
- Your employee record must be linked to your Oracle Applications user account.
- Universal Work Queue profile options must be configured for application work.
- You must be defined as a CRM resource in Oracle Applications.
- You must have the appropriate CRM roles in your CRM resource record.
- You should identify the refresh strategy for the work item count in Universal Work Queue.

Work item counts may be refreshed when the Universal Work Queue window opens, after each delivery of a media work item, or manually.

The refresh strategy is set by your system administrator using the IEU: Desktop: UI: Refresh Style profile option. The refresh strategy may be the same for all agents in your interaction center or it may differ based on application, responsibility, or even user account.

For media work:

- You must satisfy the prerequisites for application work.
- Oracle interaction center information must be defined in your CRM resource record.
- Universal Work Queue profile options must be configured for media work.
- Oracle TeleSales or Oracle TeleService profile options must be configured for media work.
- You should identify your phone extension. For example, if your phone number is 123-456-7890 and the length of internal extensions for your interaction center is set to five, then your phone extension is 67890.

You may have to enter it when you navigate to Universal Work Queue. If your

system administrator has entered your phone extension in the IEU: Optional: Phone Extension profile option for your user account, then you will not have to enter your phone extension.

icWork Controller:

- A load progress bar will appear to indicate the launching activity of Universal Work Queue and the icWork Controller. This may be configured on or off. The default setting should be off.

## Steps

1. Navigate to the Universal Work Queue window.

Application	Procedure
TeleService (Support)	<ul style="list-style-type: none"><li>• In the Navigator window, on the Functions tab, choose <b>Universal Work Queue</b>.</li></ul>
TeleSales	<ol style="list-style-type: none"><li>1. Launch Universal Work Queue from the Navigator.</li></ol>

If you are enabled for application work only, then the Universal Work Queue window and the icWork Controller appear.

**Note:** This is configuration dependent and applies to application work only with the notice controller or session history and break reasons.

If you are enabled for media work, then the Phone Extension window may appear.

**Note:** If a phone extension is defined by the system administrator for your user account, then Universal Work Queue uses that phone extension for media work and does not display the Phone Extension window.

2. If the Phone Extension window appears, enter the extension of your physical phone and then click **OK**. For example, if your phone number is 123-456-7890 and the length of internal extensions for your interaction center is set to five, then enter 67890.

The Universal Work Queue window will appear.

3. Work item counts may be refreshed when the Universal Work Queue window opens, after each delivery of a media work item, or manually. The refresh strategy is set by your system administrator. You may manually refresh work item counts at any time.
4. To manually refresh work counts, from the **Tools** menu, choose **Refresh**.

## Work Selector Display Style

The UWQ Work Selector displays your assigned work nodes and allows you to view your current work load and select a specific node to view Summary information about each qualified work item.

You will be configured by default for either Tree Work Selector or Cascading Work Selector at startup. You may always use the Work Selector Toggle control to switch between Tree and Cascading Work Selector.

There are two display views for the Work Selector:

- Tree Selector (sometimes referred to as "HGRID") always displays on the left side of the Agent Workplace. It shows your assigned nodes and the current qualified node codes.
- Cascading Selector is a drop down menu displayed at the top of the Agent Workplace, providing more room for the Summary Table. It includes the same information as the Tree Selector.

The Tree Selector takes up additional space but it shows you, at a glance, your current work load and allows individual node refresh and node customization. The Cascading Work Selector is more compact and can be faster to navigate but it rolls up out of the way so it does not always show your current workload.

Use the Tree Work Selector to view your current workload or to customize the display of current nodes. See *Managing Nodes and Counts* for instructions on how to customize node display.

## Using the Tree Work Selector

Use the Tree Work Selector to view your current workload or to customize the display of current nodes. See *Managing Nodes and Counts* for instructions on how to customize node display.

### Expanding to view full sub-nodes.

The tree structure allows you to expand and collapse nodes with sub-nodes. If a collapsed node has sub-nodes a Plus [+] option displays to its left. Click on the Plus

option to expand the node and view its sub-nodes.

### **Collapsing to hide sub-nodes.**

The tree structure allows you to expand and collapse nodes with sub-nodes. You may hide sub-nodes by clicking on the Minus [-] option to the left of the node.

### **Selecting a Node.**

Select a node or sub-node by clicking on it within the tree. This will highlight the node and make it the active current node. All qualified work items or classes will display in the Work Summary Panel to the right of the Tree Work Selector.

### **Using the Cascading Work Selector.**

Use the Cascading Work Selector to select nodes and sub-nodes.

### **Viewing Nodes and Sub-Nodes**

Click on the expand option on the right side of the Cascading Work Selector. This drops down a menu of your base nodes and their work counts. A right pointing black triangle expand option indicates there are sub-nodes present.

Move the mouse over the nodes in the menu to highlight the menu items and display a cascading menu of sub-nodes, if present, to the right. Again this shows the sub-node and its counts and an expand option if there are sub-nodes. Move the mouse to highlight the selection and open a cascading menu if the expand option is present.

Select a node or sub-node by clicking on the selected node name. This populates the Work Summary Panel with qualified work items.

### **Changing Selector Display Style**

Use the Switch Display toolbar icon or the Tools menu option to toggle between Tree and Cascading Work Selector. The menu option and the mouse over tool tips always show the display style you will switch to:

- If Cascading Work Selector it will say "Switch Display to HGRID"
- If Tree Work Selector it will say "Switch Display to Cascade"

## **Navigating Universal Work Queue**

This section provides you with information about work access features and shortcuts for navigating within Universal Work Queue.

## Keyboard Navigation

In addition to being able to use the mouse to access and select work nodes and work items, you can accomplish the same tasks through the use of the keyboard.

The following table presents keyboard shortcuts for navigating in the Universal Work Queue interface.

Function	Shortcut Key
Activate keyboard operation and selection mode	<ul style="list-style-type: none"><li>• Left Arrow</li><li>• Right Arrow</li><li>• Shift + Shortcut Key</li></ul>
Activate keyboard operation and selection mode	Alt
Navigate between menu bar options	<ul style="list-style-type: none"><li>• Left Arrow</li><li>• Right Arrow</li><li>• Shift + Shortcut Key</li></ul>
Exit from a keyboard option	Esc
Exit from keyboard operation mode	Esc
Navigate between fields in the interface	Tab
Navigate between fields in the interface	<ul style="list-style-type: none"><li>• Up Arrow</li><li>• Down Arrow</li><li>• Right Arrow</li><li>• Left Arrow</li></ul>

**Note:** Shortcut keys provide another means for navigating within the Universal Work Queue interface. See Menu Bar and Toolbar, Tools - Keyboard Shortcuts, Actions - Keyboard Shortcuts, and icWork

Controller - Keyboard Shortcuts for additional information. When using either the Tab key or Arrow keys to navigate within the interface, fields in which the information is predefined and available for selection only are denoted by a perforated line above and below the field. A blinking cursor appears in fields in which you are able to enter text.

## Menu Bar and Toolbar

The menu bar and toolbar in Universal Work Queue provide several ways for you to easily navigate and quickly access features within the interface.

**Note:** This lists all available work control actions, but the ones available to individual users depends on their profile settings.

You can perform the following actions:

- switch responsibility
- clear quick filter settings
- reset quick filter settings
- refresh current counts
- switch between work selector views (cascade and tree)
- get work
- get next priority work item delivered
- reschedule current work item
- request work
- configure work source
- reset an interaction
- stop media work

## Tools - Keyboard Shortcuts

The following table features keyboard shortcuts for functions available from the Tools option on the menu bar in Universal Work Queue.

**Note:** These shortcuts depend on user configuration.

<b>Function</b>	<b>Shortcut Keys</b>
Refresh All Work	Shift + R
Refresh Current Counts	Right-click on work type node
Web Availability	Shift + W
Clear Filter	Shift + F
Default Filter	Shift + D
Switch display to Cascade	Shift + C
Switch display to Hgrid	Shift + H

## **Actions - Keyboard Shortcuts**

The following table features keyboard shortcuts for functions available from the Actions option on the menu bar in Universal Work Queue. If media is enabled, media handling actions can be performed from the icWork Controller including the ability to access action options through the use of keyboard shortcuts. The following is a list of the keyboard shortcuts available from the icWork Controller.

<b>Function</b>	<b>Shortcut Keys</b>
Get Work	Shift + G
Next Work	Shift + X
Reschedule Work	Shift +R
Configure Work	Shift + C
Request Work	Shift + Q

## Working on Application Work Items

Universal Work Queue supports two work access methods for application work: queued work access and node work access. There are two queued work access methods: queued delivery and distribution and queued work distribution.

Node work access allows you to access assigned work within the Agent Workplace through the Work Selector nodes. By selecting nodes you may view, organize, open or act upon the work within the Work Summary Panel. We refer to this work method as "Browse and Select" because you can browse through your work items, set your work priorities and select the work you wish to work upon.

Work access methods are controlled by profile settings. Depending on your configuration you may be able to request work distribution, request delivery and distribution and access nodes.

Use the following procedures to manage application work items.

### Tasks

You can perform the following tasks:

- Configuring Work Sources
- Viewing Work Items in the Work Summary Panel
- Selecting Work from the Work Summary Panel
- Next Work Delivery and Distribution
- Requesting Work
- Getting Work
- Snooze Work

## Configuring Work Sources

You may configure Work Sources included in the Next Work Delivery and Distribute request if your administrator has granted you permission.

Once configured you will receive work from the set Work Sources for each Next Work request. This allows you to focus on a specific category of work. Change your work configuration if the current configured queue is "empty" or when you wish to change your work category.

Use this procedure to configure work sources for the delivery of work.

**Note:** The Configure Work Sources option is available from the Actions option.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

User must be enabled for queued work methods, assigned work sources and granted queue configuration privileges.

## Steps

1. In the Universal Work Queue window, select **Actions** from the menu bar.
2. Select **Configure Next Work**.

The Configure Work Queue window appears which lists all of your assigned Work Sources. Use the boxes to include (or exclude) Work Source for your Next Work request.

The "Any Work Source" options allows you to receive work from any work source. You must select at least one Work Source.

Select the work source to include work types in the queue. The following table describes the options available for configuring work. The options presented in this table may not be exhaustive and you may not be able to access all of the work sources listed, excluding "prompt on each delivery request" and "any work source (blended)" which are always accessible and available.

---

Select this option...	To
Prompt on each delivery request	To specify that you will be prompted before the delivery of each work item.
Any Work Source (blended)	To specify the blending of any and all work sources.

---

Select this option...	To
Task	To specify the delivery of task work sources.
Service Request	To specify the delivery of service request work sources.
Service Request Task	To specify the delivery of service request task work sources.

3. Select the box to include a work source or enable an option; uncheck it to exclude the work source or disable the option for the work request.
4. Click **OK**.

## Viewing Work Items in the Work Summary Panel

The Work Summary panel lists qualified and actionable work items, one-by-one, in standard row format. You can view, access and select an individual item to work on. When you select a work item, the appropriate business application form launches for you to act on the work item.

Use this procedure to view work item in the Work Summary panel.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

None

### Steps

1. In Universal Work Queue from the Work Summary panel in the agent workplace.  
A list of work items will appear for the work node. Each actionable work item will appear in row format based on applied filters.

## Selecting Work from the Work Summary Panel

In Universal Work Queue from the Work Summary Panel in the Agent workplace click on the work item you wish to select.

You may act upon the work item through the work panel, depending upon your configuration. You may open the work item by clicking "Get Work" on the toolbar or by double clicking the work item within Work Panel.

Use this procedure to select a work item from the work summary panel.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

None

### Steps

1. In Universal Work Queue from the work summary panel in the agent workplace, double-click on a work item.

The appropriate business application form launches for you to act on the work item.

**Note:** You may select two or more work items from the Work Summary Panel. You will not be able to open them, but some work panel actions will act upon multiple items at once.

**Note:** To select several consecutive work items click to select the first work item then use SHIFT-Click to select the last work item in the set. To select two or more discontinuous work items CTRL-Click on each work item you wish to select. To remove (unselect) work items from a set use CTRL-Click on a selected work item.

**Note:** You cannot launch more than one work item at a time.

## Next Work Delivery and Distribution

The Next Work option requests delivery and distribution of the next priority work item from the queue.

**Note:** This applies to queued work distribution and delivery.

Use this procedure to receive the delivery and assignment for the next priority work item.

**Note:** The Next Work option is available from the Actions option on the menu bar and from the toolbar. You can configure the active work sources through the Configure Work Sources option. It is also accessible from the Next Work icon in the icWork Controller.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. On the UWQ Agent Workplace toolbar or on the icWork Controller toolbar click **Next Work**. Or you may use the Actions->Next Work option from the menu.

This delivers the next work item.

**Note:** If configure next work for "Prompt on Delivery" the Configure Next Work window allows you to select Work Sources for your request. Click **OK** to receive delivery or Cancel to do other work.

## Snoozing Work

The Snooze Work option allows you to defer a work item that has been delivered to you

so that you can address it at a later time. You can specify the exact date and time or specify the snooze item until a specific hour. For example, deferring a work item to collaborate with an individual in another time zone.

Use this procedure to snooze a delivered work item.

**Note:** The Snooze Work option is available from the Actions option on the menu bar and from the toolbar.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. In the Universal Work Queue window, select **Actions** from the menu bar.
2. Select **Snooze Work**.

The Snooze Work window appears. Select the hour and minute parameter or specify the date and time. The following table describes the options available for snoozing work.

Select this option...	To
After Hours or Minutes	To specify after how many hours or minutes the work item is to be delivered again. For example, deliver the work item after 1 hour and 30 minutes from when it was first delivered.
On	To specify the exact date and time the work item is to be deferred to.

3. Click **OK**.

## Requesting Work

This option is used to request distribution of one or more queued work items. The number of work items requested is predetermined by your administrator and your qualification.

Use this procedure to request distribution only. Universal Work Queue will attempt to distribute the specified number of work items.

**Note:** The Request Work option is available from the Actions option on the menu bar and from the toolbar.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. From the UWQ Agent Workplace click on the Request Work toolbar icon or select the Action menu Request work option.

This displays the Assign Work from Queue dialog window. This displays a list of all Work Sources (types) your current responsibility qualifies to receive.

2. Use the boxes to select or exclude Work Source for this request. You may use the "Any Work Source" to request any type of work.

3. Click **OK** to receive work or **Cancel** to abort the request.

This closes the Assign Work from Queue dialog; UWQ distributes work from the selected Work Sources in priority order. A pop-up window informs you of the amount of work distributed. Depending on available qualified work in the selected Work Sources you may receive all requested work, some requested work or no work.

4. Use the agent workplace nodes to organize, view, select or act upon distributed work.

5. When you have finished your distributed work or completed all available tasks, use Request Work to receive more work.

## Getting Work

The individual application (non-media) work item nodes allow you to browse work items to be worked and to select a specific item to work on.

Use this procedure to browse and select a work item.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. Select a work item in the Work Summary Panel.

**Note:** If necessary, expand the application node to access the work item nodes.

2. Click **Get Work** or double-click on the work item.

This launches the work item by opening it in the appropriate application form.

3. When you finish, save your work in the application window.

4. To select, open, or launch another work item, select the work item and then click **Get Work**.

## Using the Work Panel

The Work Panel presents details as they pertain to a work item. You can view special message instruction, notes, work item detail such as status and priority. You can also perform updates to the work item. Some of the updates that you can perform include: actions, enter notes, change the status or priority, adjust the begin and end dates. You can choose to keep the Work Panel visible and expanded while viewing the Work

Summary panel or choose to minimize it. To the right of the Message Panel is a expand or collapse button for controlling this view.

If you select more than one work item in the work summary panel, the work panel does not display Notes, Special Instructions or parameter details. You may still add notes and change action parameters. Applying changes with multiple work items selected updates ALL selected work items. For example, to enter the same note for all work items select an action that supports note creation, enter the note and apply the action. All work items will now have the same note.

Only some actions support multiple work items. When you select more than one work item, only actions that support multiple work items will be available from the Action drop down.

**Note:** To view more records in the Work Summary Panel you may hide the Work Panel using the expand option to the right of the Special Instruction Panel.

Use the following work panel procedures to view and modify work item detail.

- Viewing Notes, page 2-18
- Entering a New Note, page 2-19
- Viewing Work Item Detail, page 2-20
- Assigning a New Action, page 2-20
- Acting Upon a Work Item, page 2-21
- Viewing the Message Panel, page 2-22

## Viewing Notes

The Notes Panel presents notes that have been entered for a work item. It consists of several regions: note header and note detail panel. The note header lists the note types available for the work item (such as contact notes or customer notes). The Note panel supports multiple note types. You can scroll through notes entered by using the scroll bar which resides to the right of the Notes Panel or use the previous and next buttons, available next to the note type drop-down list.

Use this procedure to select a note type and view the notes that have been entered for a work item.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. From the Work Summary panel in the agent workplace, select a work item.  
Work item detail will appear in the Notes Panel and the Action Panel.
2. In the Notes Panel, select a note type from the note drop-down list.  
Notes that have been entered for the work item will appear.
3. Scroll through all notes entered for the work item or select a different note type to view other notes entered.

## Entering a New Note

As you work with work items, it is sometimes necessary to add a new note based on current activity for the work item. For example, you may need to enter a note because the priority changed, the contact information changed, additional information is required or the work item is deferred.

Use this procedure to enter a new note for the work item.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. In the Notes Panel, select a note type.

2. From the Work Summary panel in the agent workplace, select a work item.
3. Work item detail will appear in the Notes Panel and the Action Panel.
4. Navigate to the Action panel.
5. In the New Note field, enter a new note for the work item.
6. Click **Apply**.

## Viewing Work Item Detail

Details associated to the work item appear in the Action Panel. Key information about the work item and may include information such as the priority, status, start date, end date, description, and customer contact information will appear. You can also update work item detail.

Use this procedure to view work item details.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. From the Work Summary panel in the agent workplace, select a work item.  
Work item detail will appear in the Notes Panel and the Action Panel.
2. Scroll through the Action Panel to view all work item detail.

## Assigning a New Action

The actions available to you from the Action panel differ by work type and from node-to-node. Also different actions may be available when multiple work items are selected. Each node has a default action configured by your administrator.

Use this procedure to change the current action.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. From the Work Summary panel in the agent workplace, select a work item.  
Work item detail will appear in the Notes Panel and the Action Panel.
2. Navigate to the Action Panel.
3. In the Actions drop-down list, select a new action for the work item.
4. Click **Apply**.

## Acting Upon a Work Item

You may act upon one or more work items from the Action panel. Actions allow you to update work items, add node, etc. Each action may have a set of work item attributes details you may view or change to update the work item. Different actions present different attributes.

Use this procedure to act upon selected work items.

**Note:** Not all nodes support Work Panel. Each action is specific to the work item. The changes you make are the same as if you had made them from within the application form.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. From the Work Summary panel in the agent workplace, select a work item.  
Work item detail will appear in the Notes Panel and the Action Panel.
2. Navigate to the Action panel.
3. In the Task Status drop-down list, select a new status for the work item.
4. Select an action.
5. Enter, edit or set work item attributes within the Action panel.
6. Click **Apply**.

## Viewing the Message Panel

The Message Panel provides key information about the work item.

Use this procedure to view the special message instruction and information.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. From the Work Summary panel in the agent workplace, select a work item.  
Work item detail will appear in the Message Panel, Notes Panel and the Action Panel.  
  
The description of the special instruction will appear to the left of the message. The full message text appears in the field to the right of the description. You can expand

the view of the message text by using the ellipse button.

## Working on Media Work Items

Use the following procedures to handle media work items.

- Handling Inbound Telephone Calls, page 2-23
- Working on Outbound Campaigns, page 2-26
- Returning Web Callbacks, page 2-28
- Managing Blended Calls, page 2-30
- Using the Softphone in the icWork Controller, page 2-33
- Viewing Your E-mail Workload, page 2-32
- Resetting an Interaction, page 2-32

## Handling Inbound Telephone Calls

When the interaction center receives an inbound call, the call is classified and then routed to a pool of one or more agents. Your Inbound Telephony node displays the number of inbound calls that have been routed to agent groups to which you belong.

Inbound call counts are categorized by call classification. Only call classifications with available inbound calls are listed, even though you may be eligible to answer calls in other call classifications.

Other agents may be eligible to answer calls in a call classification. The inbound call count for a call classification will decrease when another agent answers a call. When the last remaining call for a call classification is answered, the call classification will disappear from your inbound telephony node.

In passive mode, the Inbound Telephony node shows queue counts for assigned ACD queues.

Use this procedure to indicate that you are ready to receive inbound calls.

**Note:** Always use the softphone when it is present. Never use your physical telephone unless directed to by either a warning message or your supervisor.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. In the Universal Work Queue window, expand the Media node and click **Inbound Telephony**.

Inbound calls counts are categorized by call classification in the summary pane.

### To Start Receiving Inbound Calls:

To start receiving inbound calls:

1. Click a call classification.
2. Click **Get Work**.

When the call is delivered, Universal Work Queue and the application execute a screen pop. Universal Work Queue launches the appropriate application form, based on the classification action setting and passes the call information. The application opens the work item and displays the work details based on the call information.

3. Work within the application during your customer interaction. At the end of the call, press **Release** on the softphone to hang up the call.

If there is after-call work, such as completing an order or sending collateral, complete it within the application.

When you have completed all after-call work, you may wrap up and status the interaction.

### To End an Inbound Call:

To end the call and complete your work in the current interaction:

1. Press **Release** on the softphone to hang up the call.
2. Complete your work.
3. Wrap up the interaction.

### **To End the Interaction and Request Another in the Same Classification:**

You may manually wrap up an interaction. Follow the application instructions; it will present a wrap-up screen where you may record your actions and the interaction outcome.

**Note:** This only applies to manually wrapping up an interaction. You do not have to click **Next Media** in the icWork Controller toolbar. Automatic status will end the interaction.

1. Select a call outcome.
2. Complete all media work.
3. Click **End Interaction** in the application window.

You are now ready to request the next inbound call of the same classification.

### **To End an Interaction and Suspend Call Delivery:**

To stop working the inbound classification and suspend call delivery:

1. Press **Stop Media** or **Request Break** before ending the interaction.
2. Press **Release** on the softphone to hang up the call.
3. Select a call outcome.
4. Complete all media work.
5. Click **End Interaction** in the application window.

**Note:** If you are using session tracking, you may request a break and suspend inbound calls after requesting a break, you will be prompted for a break reason.

To Change Media Source, Media Provider, or Classification

### **To Change Media Source, Media Provider, or Classification:**

To change a media source, media provider, or classification:

1. Press **Release** on the softphone to hang up the call.
2. Select **Stop Media**
3. Wrap up the interaction.

4. From the Agent Workplace, select a new media source or classification, then press **Get Work**.

## Working on Outbound Campaigns

Use this procedure to start making outbound calls for a campaign.

**Note:** Always use the softphone when it is present. Never use your physical telephone unless directed to by either a warning message or your supervisor.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

None

### Steps

1. From the agent workplace, select the media node and the outbound campaign sub-nodes using the tree view or cascading Work Selector.

Outbound calls counts are categorized by campaign.

#### **To Start Making Outbound Calls:**

To start making outbound calls:

1. Select a campaign.
2. Click **Get Work**.

Universal Work Queue launches the appropriate application form, based on the classification action setting and call information.

3. If necessary, place the call using the softphone.

#### **To End an Outbound Call:**

To end the outbound call and complete your work in the current interaction:

1. Press **Release** on the softphone to hang up the call.
2. Complete your work.
3. Wrap up the interaction.

### **To End the Interaction and Request Another of the Same Campaign:**

To end the interaction and request another interaction for the same campaign:

**Note:** You do not have to click **Next Media** in the icWork Controller toolbar. Automatic status will end the interaction.

1. Select a call outcome.
2. Complete all media work.
3. Click **End Interaction** in the application window.  
You are now ready to receive calls of the same classification.

### **To End the Outbound Interaction and Suspend Call Delivery:**

To end the outbound interaction and suspend call delivery:

1. Press **Stop Media** or **Request Break** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.

### **To Change Outbound Campaigns:**

To handle calls for a different campaign:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.
5. Select a different campaign.
6. Click **Get Work**.

## Returning Web Callbacks

While browsing your company's web pages, customers may request a callback to answer an immediate question. This callback request is relayed through the Advanced Inbound interaction which queues and routes the callback request as if it were an inbound call. When an agent is available to handle the callback request, Advanced Inbound dials the customer and Universal Work Queue delivers the call just as it does inbound calls.

**Note:** Always use the softphone when it is present. Never use your physical telephone unless directed to by either a warning message or your supervisor.

Use this procedure to request, receive and handle web callbacks.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

None

### Steps

1. In the Universal Work Queue window, expand the Media node and click **Web Callback**.

Web callback counts are categorized by call classification.

#### **To Start Returning Web Callbacks:**

To start returning and receiving web callbacks:

1. Select a classification.
2. Click **Get Work**.  
The appropriate application window opens and displays the details of the work item.
3. If necessary, place the call by clicking softphone dial button. Reasons for using the

softphone include: delays between customer request and execution due to callback queue length, the customer may not answer the call, the line may be busy, the customer hangs up due to transfer problem, or the call to customer may not go through for some other reason.

### **To End the Web Callback:**

To end the web callback call and complete your work in the current interaction:

1. Press **Release** on the softphone to hang up the call.
2. Complete your work.
3. Wrap up the interaction.

### **To End the Web Callback and Request Another of the Same Type:**

To end the web callback and request another call of the same type:

**Note:** You do not have to click **Next Media** in the icWork Controller toolbar. Automatic status will end the interaction.

1. Select a call outcome.
2. Complete all media work.
3. Click **End Interaction** in the application window.

You can now ready to receive calls of the same classification.

### **To End the Web Callback and Suspend Call Delivery:**

To end the web callback and suspend call delivery:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.

**Note:** If a call is on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

### **To Request Calls for a Different Classification:**

To request calls for a different classification:

1. Press **Stop Media** before ending the interaction.
2. Select a call outcome.
3. Complete all media work.
4. Click **End Interaction** in the application window.
5. Select a different call classification.
6. Click **Get Work**.

## **Managing Blended Calls**

Universal Work Queue supports service level and priority source blending. Users who are enabled for Interaction Blending will have a Blended node in the Work Selector. Depending on the blending mode configuration (forced or optional), you may only have a blending node (forced), or you may have a blending node as well as other media nodes for inbound, outbound, and well callback (optional).

Use this procedure to start handling blended calls.

**Note:** Always use the softphone when it is present. Never use your physical telephone unless directed to by either a warning message or your supervisor.

### **Login**

Oracle Forms Applications

### **Responsibility**

Customer Support or TeleSales Agent

### **Prerequisites**

None

### **Steps**

1. In the Universal Work Queue window, click **Blended**.

Media work is categorized by type.

2. To start handling blended calls, click a node and then click **Get Work**.  
  
The appropriate application window opens and displays the details of the work item. Blending will determine the appropriate media source based on service levels in your assigned media channels. If you have priority blending, and there is an available inbound call you will receive that; otherwise you will receive an outbound record.
3. If you want to end the call and complete your work in the current interaction, then do the following:
  1. Click **Release** on the softphone to hang up the call.
  2. Click **Wrap Up** in the application window.
  3. Complete your work.
4. If you want to end the interaction and request another call from the Blended node, then do the following:
  1. Click **End Interaction** in the application window.
  2. Select a call outcome.  
  
**Note:** You do not have to click **Next Media** in the icWork Controller toolbar.  
  
You are now ready to receive a call.
5. If you want to end the interaction and suspend call delivery, then do the following:
  1. Click **Stop Media** in the icWork Controller or Oracle Applications toolbar.
  2. Click **End Interaction** in the application window.
  3. Select a call outcome.
6. If you want to request calls of a different media type, then do the following:
  1. Stop working in blended mode and request calls of a specific media type.
  2. Click **Stop Media** in the icWork Controller or Oracle Applications toolbar.
  3. Click **End Interaction** in the application window.
  4. Select a call outcome.

**Note:** If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

5. Click a different call classification and then click **Get Work** in the Universal Work Queue window.

## Viewing Your Email Workload

You may access email accounts and classifications from within Universal Work Queue to request new email and access unfinished responses from their inbox. Both access methods launch the HTML Email client.

Use this procedure to view your e-mail work load.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

None

### Steps

1. In the Universal Work Queue window, expand the Media node and click an e-mail node.

A summary is displayed in the detail summary pane.

## Resetting an Interaction

The need may arise to reset an interaction or the softphone state. For example, you may receive an error message about pending interactions when all interactions are complete, or your softphone is out of synch, or you may have lost connectivity to the server and were instructed to reset the phone.

**Note:** You cannot reset an interaction when you have a call present.

You must complete and hang up all calls before performing reset interaction.

Use this procedure to reset an interaction and softphone state.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. If you have one or more calls, complete the calls and hang up. If the softphone is "out-of-synch" and does not respond, use your physical phone to end the calls.
2. From the **Tools** menu, choose **Reset Interaction**.

After the reset completes, you must return to the Agent Workplace in Universal Work Queue and request work. Either select a media source or work item and click **Get Work**, **Next Work** for the next queued work item or **Next Media** for the next media item.

## Using the icWork Controller

The icWork Controller is an alternate component that serves as a 'remote control' for accessing work. From it you can access and use the softphone or notice control, view activity status, record break session information, and request work.

### Using the Softphone in the icWork Controller

The softphone allows you to control your phone calls. It is always present in icWork when you are configured for any telephony service, inbound, outbound or web callback. The softphone becomes disabled if it cannot connect with the Oracle Universal Work Queue server or the Oracle Telephony Manager server or, in some cases, when the supporting telephony services are not available.

**Note:** Always use the softphone when it is present. Never use your physical telephone unless directed to by either a warning message or

your supervisor.

Use the softphone in place of your physical phone to:

- View call information
- Answer incoming phone calls
- Make outbound calls
- Hang up (end a call)
- Place a call on hold or retrieve it from hold
- Transfer a call to another agent or to a call queue
- Conference in another agent or a call queue

The softphone consists of the following components:

- Call information window. This shows information about the current active call; if no active call is present it shows your extension and session information. The call information varies by channel, inbound and outbound show different call information.
- Dial entry text box. Allows you to enter a phone number and execute a dial.
- Dial pad. Allows you to enter dial numbers using a mouse.
- Line buttons. Allow you to select and view call status on up to three (3) available lines. Click on the line buttons to:
  - Answer incoming calls.
  - Select a line for outbound dial.
  - Retrieve a call from hold.

The line button indicates the call status, which are as follows:

<b>If the line color is...</b>	<b>Call status is...</b>
Gray	Available, not in use
Green (steady)	In use, active on call line

<b>If the line color is...</b>	<b>Call status is...</b>
Green (flashing)	Held call on line
Yellow (flashing)	Ringing

The call control buttons are as follows:

<b>The call buttons are...</b>	<b>Are used to...</b>
Dial	Dial number displayed in the dial entry text box
Hold	Hold current active call or retrieve call (if only one line active)
Release	Hang up current active call
Transfer	Use to transfer the call
Conference	Use to conference the call

- Speed Dial drop down. Allows you to select a number and execute a speed dial without entering the phone number in the dial text box. Select the number from the drop down and press the dial button to call the party.

There are several important considerations to note:

- Always use the softphone when it is present; never use your physical phone unless your are specifically instructed to by a warning message or by your supervisor.
- If you use your physical phone the softphone may not accurately reflect the current call status of your extension; it may not synchronize with your physical phone. If this happens, you may reset the softphone using the Tools->Reset Interaction menu option in the agent workplace. Be sure to finish any calls because you cannot use the Tools > Reset Interaction function if there is a call on your extension to reset your softphone status.
- If your telephony configuration does not support Auto Hold, then clicking on another line button from an active call will hang up (release) the current call. If you telephony does support Auto Hold, then clicking on another line button place the current call on hold, you must use release to end a call

Use the following procedures to operate the softphone.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

None

### Steps

1. In the icWork Controller, click the Phone tab.

**Note:** For the Avaya switch, auto-hold is supported. Any current call will be placed on hold when you click another line button. To hang up the current call, click Release.

**Note:** If auto-hold is not enabled, then the current call will end when you click another line button. To put any current call on hold, you must click Hold.

Use the following table to find procedures for operating the softphone.

To...	Do this...
Answer a call	<p>Click a yellow line button (for example, Line 1).</p> <p><b>Note:</b> If the switch is set for auto-hold, then clicking another line button will place any current call on hold.</p> <p>If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button.</p>

To...	Do this...
Place a call	<ol style="list-style-type: none"> <li data-bbox="992 306 1446 369">1. Click a gray line button (for example, Line 1).  <b>Note:</b> If the switch is set for auto-hold, then clicking another line button will place any current call on hold.  If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button.</li> <li data-bbox="992 758 1446 852">2. Use the dial pad, type the numbers using your keyboard, or select a previously entered number.</li> <li data-bbox="992 894 1154 926">3. Click <b>Dial</b>.</li> </ol>
Enter a response to a voice prompt	<ol style="list-style-type: none"> <li data-bbox="992 989 1446 1083">1. Use the dial pad, type the numbers using your keyboard, or select a previously entered number.</li> <li data-bbox="992 1115 1154 1146">2. Click <b>Dial</b>.</li> </ol>
Place a call on hold	<p data-bbox="992 1209 1114 1236">Click <b>Hold</b>.</p> <p data-bbox="992 1268 1446 1394"><b>Note:</b> If the switch is set for auto-hold, then clicking another line button (for example, Line 1) will also place the current call on hold.</p> <p data-bbox="992 1425 1446 1514">If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button.</p>

To...	Do this...
Remove a call from hold	<ol style="list-style-type: none"> <li>1. The line button for a holding line blinks green. If only one line is holding, click <b>Hold</b></li> <li>2. If multiple lines are holding, click the line button (for example, Line 1) for the holding line.</li> </ol>
Hang up a call	<p>Click <b>Release</b> or click another line button (Line 1).</p> <p><b>Note:</b> If the switch is set for auto-hold, then clicking another line button (for example, Line 1) will also place the current call on hold and not release the call. You must return to the line and then click Release.</p> <p>If the switch is not set for auto-hold, then any current call, not on hold, will end when you click another line button.</p>

---

**To...****Do this...**

---

Transfer a call

To transfer a call with the softphone on a *non-Aspect* switch:

1. With the caller on the line, dial the number to which you want to transfer the call.

2. Click **Transfer**.

The call is put on hold and the number is dialed.

3. When the call is answered, click **Transfer** again.

To transfer a call with the softphone on an *Aspect* switch:

1. Click **Hold** to place the call on hold.

2. Select a gray line button.

3. Dial the number to which you want to transfer the call.

4. When the call is answered, click **Transfer**.

---

To...	Do this...
Conference a call	<p data-bbox="898 306 1365 369">To conference a call with the softphone on a <i>non-Aspect</i> switch:</p> <ol data-bbox="898 390 1325 688" style="list-style-type: none"> <li data-bbox="898 390 1325 485">1. With the caller on the line, dial the number that you want to add to the conference call.</li> <li data-bbox="898 520 1325 590">2. Click <b>Conference</b>. The call is put on hold and the number is dialed.</li> <li data-bbox="898 625 1284 688">3. When the call is answered, click <b>Conference</b> again.</li> </ol> <p data-bbox="898 730 1365 793">To conference a call with the softphone on an <i>Aspect</i> switch:</p> <ol data-bbox="898 814 1349 1115" style="list-style-type: none"> <li data-bbox="898 814 1325 842">1. Click <b>Hold</b> to place the call on hold.</li> <li data-bbox="898 877 1203 905">2. Select a gray line button.</li> <li data-bbox="898 940 1349 1010">3. Dial the number that you want to add to the conference call.</li> <li data-bbox="898 1045 1284 1115">4. When the call is answered, click <b>Conference</b>.</li> </ol>
Indicate readiness for calls	Click <b>Next Call</b> .
Suspend calls	<p data-bbox="898 1251 1284 1278">Click <b>Stop Media</b> or <b>Request Break</b>.</p> <p data-bbox="898 1304 1349 1493">Note: Suspend calls before ending an interaction and requesting another call. Otherwise, if a call is already on its way to you before you click Suspend Calls, you will receive one more before your calls are suspended.</p>
Get the next priority application work item delivered	Click <b>Next Work</b> .

To...	Do this...
Take a break	<ol style="list-style-type: none"> <li>1. Click <b>Break</b>.</li> <li>2. Select a break reason.</li> <li>3. Click <b>OK</b>.</li> </ol> <p>You can record break reason transitions without cycling through return from break to starting a new break. Right-click on the break indicator in the lower right corner of the icWork Controller. You can indicate a new break reason. The break status will appear in the agent workplace.</p>

## Managing Notices from the icWork Controller

Use the Notice tab to select the Notice Controller and access your Notices. The Notice Controller allows you to navigate through, manage, and read your notices. If the Notice contains special information that identifies a related work item, you may open the work item using the Launch button.

### Notice Controller Components

The Notice Controller has the following components:

- Notice Title -- at the top of the notice control this displays the title or subject of the Notice.
- Notice Message -- a box just below the Notice Title, this contains full message text. You may scroll up or down if the message is longer than can display in the window.
- Notice Status -- just below the message box this displays the Notice Status, either New or Acknowledge.
- Navigation buttons -- four navigation buttons that allow you to jump to the first (newest) or last (oldest) notice or step backward or forward through notices one at a time.
- Navigation Position -- between the forward and backward navigation buttons this shows your position within the list; the current Notice number and the total number of Notices in the list (e.g., 2 of 6).

- ACK (Acknowledge Notice) button -- allows you to acknowledge the current (displayed) Notice.
- Launch button -- allows you to launch the work item related to this Notice. This is only enabled if work item information was included with the Notice.
- Clr (Clear Notice) button -- clears the current (displayed) Notice from the list of active Notices.
- Message Filter -- drop down allows you to apply a filter to view only New Notices or Notices of a specific age (e.g., one hour old, one day old, one week old, one month old)
- Refresh -- allows you to check for new Notices, refresh the current list after Acknowledging or Clearing one or more Notices, and apply new filter settings.

### **Viewing Notices**

Select the Notice Tab and read the current Notice. After a refresh you are always on the first (oldest) Notice. Use the Navigation buttons to view other Notices. If there are no Notices the Notice Title will display "No Messages".

### **Navigating Through Notices**

The Notice list is ordered chronologically from newest to oldest. There are four navigation buttons that allow you to move around within the list of Notices:

- double arrow left -- jump to first (newest) Notice.
- single arrow left -- step backward through newer Notices.
- single arrow right -- step forward through older Notices.
- double arrow right -- jump to last (oldest) Notice.

Between the left and right notices the Navigation Position shows your current Notice Position and the Total Number of Notices in the list.

If there are no Notices in the current filter list the Navigation arrows will be disabled and the Navigation Position will show: 0 of 0.

When you are at the First (newest) Notice, the left arrow Navigation controls are disabled.

When you are at the Last (oldest) Notice, the right arrow Navigation controls are disabled.

### **Acknowledging Notices**

Use the Ack button to acknowledge a Notice. This changes the status to Acknowledged and removes the Notice from the New filter list after the next Refresh.

### **Clearing a Notice**

Use the Clr button to clear the Notice so it no longer appears in the controller. You must press Refresh to update the list.

### **Launching a Work Item**

Use the Launch button to open the subject work item. The Launch button will only be enabled if there is a subject work item for the Notice; standard UWQ work item launch rules apply. The Launch button is disabled if there is no work item associated with the Notice.

### **Filtering Messages**

Use the drop down filter to select the appropriate filter, then press Refresh to apply the filter and refresh the current list. Note that filters may not have any valid Notices.

### **Refreshing and Checking for New Notices**

The refresh button can be used to refresh the current list after acknowledging or clearing a Notice or to apply filter changes. It may also be used to check for new Notices.

If you are configured for automatic refresh, the Notice controller will check for New Notices at regular intervals.

If you are not configured for automatic refresh you should use the refresh button to check occasionally.

## **Work Access Controls**

The icWork Controller provides work access control icons and menu options that allow you to control your outstanding media and work requests, request a break and control the icWork display size.

The Next Media toolbar icon and Action menu option allow you to request a call from the current active media source. Use this to return from break or if you have used Stop Media to temporarily suspend call delivery.

Next Media delivers a call from the media source listed in the Media line at the bottom of icWork.

Next Media is disabled if you are not configured for media, media services are not accessible or you have not performed "Get Work" on a valid media source.

### **Stop Media - Stopping Call Delivery**

Use the Stop Media toolbar icon and Action menu option to stop call delivery. You should press Stop Media after you complete a call but before you complete the interaction. If you press Stop Media after you have completed an interaction it is possible for one more call to sneak in.

Stop Media is only active if you are configured for media and have outstanding call requests.

## Next Work - Requesting Queued Delivery

Use Next Work to request Distribution and Delivery of the Next Work item. Next Work only displays on icWork if you are configured for Queued Work Distribution and Delivery. You may need to configure the work source in Agent Workplace before work is delivered.

## Break - Requesting Break

Use the Break Request button to request a break. You will be prompted to select a break reason. Press Break Request after you complete a call but before you complete the current interaction. If you press Request Break after you have completed an interaction it is possible for one more call to sneak in.

## Returning from Break

To return from break either select Next Media or Next Work or use "Get Work" from the Agent Workplace.

## Changing Break Reason

You may change your break reason without returning from break with the Change Break Reason control in the media source and work status area on icWork. You will be prompted to enter a new break reason.

## Sizing the icWork Control Display

Use the Size Toggle toolbar icon or Action menu option to toggle the icWork Controller size. It will display full size so you may access the tabbed plug-in controls or collapsed so that you may only access toolbar and menu actions and view your current work state.

## Viewing Current Activity Status and Timer

The icWork Controller always displays your current work status and media source in the last two lines of the controller. The media source line shows the current selected media source, which includes the provider and classification or campaign. So if you selected Get Work from the "Gold Customer" classification of the Web Callback provider, it would show "Web Callback, Gold Customer".

The work status line (just below media) shows your current work status and the time you have spent in that status.

If you are on break the Break Change icon allows you to change your current break reason without "returning from break" and starting a new break.

Use this procedure to view your current work status and activity state.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. In the icWork Controller, click the Status tab.

Your session information will appear in the Activity Status pane. The following activity information is available:

- Elapsed Login
- Elapsed Break
- Event Log
- Current Status

## Managing Sessions

Use the following procedures to manage sessions.

### Tasks

You can perform the following tasks:

- Taking a Break from Your Session, page 2-45
- Ending Your Session, page 2-46

## Taking a Break from Your Session

Use this procedure to take a formal break from your Universal Work Queue session.

**Note:** You may only request a break if you are configured for session tracking.

You may only request a break if you are configured for session tracking.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. In the icWork Controller toolbar or Actions menu, click **Break**.
2. In the Break Reason window, select the reason for the break and then click **OK**.
3. To resume work, do one of the following:
  - From the Universal Work Queue window, select a node and then click **Get Work**.
  - In the icWork Controller or the Oracle Applications toolbar, click **Next Work** to receive the next priority application work item.
  - In the icWork Controller toolbar, click **Next Media** to handle the next media work item of the current type.

## Ending Your Universal Work Queue Session

Use this procedure to close the Universal Work Queue window and end your Universal Work Queue session.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. Close the Universal Work Queue window (File > Close Form) or exit from Oracle Applications (File > Exit Oracle Applications).  
If session history logging is enabled, the Break Reason window will appear.
2. In the Break Reason window, select the break reason and then click **OK**.

## Managing Nodes and Counts

You may customize the Work Selector display for your current session if your administrator has configured you to allow this. You may only customize the Work Selector display from the Tree Work Selector, however all customizations apply when you switch to the Cascading Work Selector.

Note that you may not save your session customizations, when you start your next session the selector will return to display all of your configured nodes with counts.

Use the following procedures to manage nodes and counts.

## Tasks

You can perform the following tasks:

- Hide Node Counts, page 2-48
- Display Node Counts, page 2-48
- Hide Single Node, page 2-49
- Hide Specific Nodes, page 2-50
- Hide All Nodes, page 2-51
- Display One or More Hidden Nodes, page 2-52
- Display All Hidden Nodes, page 2-52

- Change the Display Order of Nodes, page 2-53
- Refresh Selective Node Counts, page 2-54
- Refresh All Node Counts, page 2-55
- Refresh Individual Node or Sub-Node Counts, page 2-55

## Hide Node Counts

You may always hide node counts, even if you are not configured to customize individual nodes.

Use this procedure to hide node counts.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

The counts column must be displayed.

### Steps

1. If the Cascading Work Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type".
3. From the drop down menu select to the "Hide Counts" box.
4. The Tree Work Selector will refresh and the counts column on the right will not display.

## Display Node Counts

Use this procedure to display node counts.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

The counts column must be hidden.

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type"
3. From the drop down menu uncheck the "Hide Counts" box.
4. The counts column on the right will display.

## Hide a Single Node

Use this procedure to hide a single node.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

You must be configured to customize nodes.

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.

2. Right click on the root node you wish to hide. (You cannot hide by right clicking on a sub-node.)
3. From the pop-up menu select "Hide"
4. The node and its sub-node tree will be hidden.

## Hide Specific Nodes

Use customize nodes to hide two or more nodes at once.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

You must be configured to customize nodes.

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type"
3. From the drop down menu select "Customize Queues."
4. This displays the Customize Queues dialog window.
5. Select the node or nodes you wish to hide from the list in the Displayed column. To select multiple nodes use either SHIFT-click to select contiguous nodes or CTRL-click to select nodes one at a time.
6. Use the single arrow left control to move selected nodes to the Excluded column.
7. Press the OK button to complete the change. (You may abort your change with the CANCEL button.)
8. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.

9. Right click on the Tree Work Selector title bar "Work Type"
10. From the drop down menu select "Customize Queues."
11. This displays the Customize Queues dialog window.
12. Select the node or nodes you wish to move. To select multiple nodes use either SHIFT-click to select contiguous nodes or CTRL-click to select nodes one at a time.
13. Use the up and down arrow keys on the right side of the window to move the selected nodes. Note selected nodes move together; discontinuous nodes will retain their position relative to each other. So if there is one node between two selected nodes, the two nodes will always have one node between them.
14. Press the OK button to complete the change. (You may abort your change with the CANCEL button.)

## Hide All Nodes

Use customize nodes to hide all nodes.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

You must be configured to customize nodes.

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type"
3. From the drop down menu select "Customize Queues."
4. This displays the Customize Queues dialog window.
5. Use the double arrow left control to move ALL nodes to the Excluded column.

6. Press the OK button to complete the change. (You may abort your change with the CANCEL button.)

## Display One or More Hidden Nodes

Use customize nodes to display one or more hidden nodes.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

You must be configured to customize nodes.

### Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type"
3. From the drop down menu select "Customize Queues."
4. This displays the Customize Queues dialog window.
5. Select the node or nodes you wish to hide from the list in the Excluded column. To select multiple nodes use either SHIFT-click to select contiguous nodes or CTRL-click to select nodes one at a time.
6. Use the single arrow right control to move selected nodes to the Displayed column.
7. Press the OK button to complete the change. (You may abort your change with the CANCEL button.)

## Display All Hidden Nodes

Use customize nodes to display one or more hidden nodes.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

You must be configured to customize nodes.

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type"
3. From the drop down menu select "Restore Queues."
4. This will display all previously hidden nodes.

**Note:** You may also use the Customize Queues option to restore hidden nodes.

## Change the Display Order of Nodes

Use customize nodes to display one or more hidden nodes.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

You must be configured to customize nodes.

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type"
3. From the drop down menu select "Customize Queues."
4. This displays the Customize Queues dialog window.
5. Select the node or nodes you wish to move. To select multiple nodes use either SHIFT-click to select contiguous nodes or CTRL-click to select nodes one at a time.
6. Use the up and down arrow keys on the right side of the window to move the selected nodes. Note selected nodes move together; discontinuous nodes will retain their position relative to each other. So if there is one node between two selected nodes, the two nodes will always have one node between them.
7. Press the OK button to complete the change. (You may abort your change with the CANCEL button.)

## Refresh Selective Node Counts

Use the following procedure to perform a selective refresh of node information or refresh of a specific node count.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the Tree Work Selector title bar "Work Type"

3. From the drop down menu select "Refresh..."
4. This displays the Queue Refresh dialog window.
5. Use the radio button options to perform the following actions from this Queue Refresh dialog window:
  1. Refresh All Work (this is the same as the Refresh Work option from the Tools menu.
  2. Refresh All Work Type Counts. This only refreshes the counts and usually is faster than Refresh All Work
  3. Selected Work Type Counts. This activates a list box immediately beneath the radio button option so you may pick the nodes to refresh the counts for.
6. Press the OK button to refresh counts or the CANCEL button to abort.

## Refresh All Node Counts

Use the following procedure to refresh all nodes with one click.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

None

### Steps

1. To refresh all work counts use the Tools menu option Refresh Work.

## Refresh Individual Node or Sub-Node Counts

Use the following procedure to perform a selective refresh of node information.

### Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

None

## Steps

1. If the Cascading Selector is displayed, use the switch selector control to change to the Tree Work Selector.
2. Right click on the node or subnode you wish to refresh.
3. Select Refresh Current Counts from the popup menu.

## Working with Quick Filters

Quick Filters allow you to focus on specific work classes based on assigned criteria in a node. Use Quick Filter attributes to set the criteria for your current activities.

To filter a node's work items use Quick Filters to:

- Specify work criteria on one, two or three quick filters by setting attribute values.
- Apply quick filters.
- Clear quick filters.
- Restore the default filter settings for a node.

Note that node counts do not reflect the current filter settings; they always show the total qualifying work items for the node.

Use the following procedures to work with quick filters.

## Tasks

You can perform the following tasks:

- Applying Quick Filters, page 2-57
- Clearing Quick Filters, page 2-58
- Restoring the Default Quick Filter, page 2-59

## Quick Filter Components

Quick Filters and the Quick Filter apply button display at the Agent Workplace, just beneath the toolbar and above the Work Summary Panel. Quick Filter controls to Clear and Restore Quick Filter settings are toolbar icons and Action menu options.

The follow components control quick filter settings:

- Quick Filter Selectors -- Drop downs that allow you to specify an attribute value for the filter. There may be zero, one, two or three selectors displayed across the top of the Agent Workplace, just above the Summary Table. Quick Filter Selectors only display for nodes that support Quick Filters for your current session.
- Apply Filter button -- Use the Apply Filter button to apply the Quick Filter attribute values. The Apply Filter button is just to the right of the Quick Filter selectors; this button only displays on nodes where Quick Filters are accessible.
- Clear Filter -- Use the Clear Filter toolbar icon and Tools menu option to clear the current filter settings and display ALL qualified node work items.
- Restore Filter -- Use the Clear Filter toolbar icon and Tools menu option to revert to your administrator assigned default (startup) filter settings.

## Setting and Applying Quick Filter Criteria

Set and apply filter criteria to focus on specific work item types and classes. Once applied the filter will last until you change it or for the rest of your session.

Use this procedure to apply quick filter criteria to your work view.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

Node must support filters. You must be configured to access quick filters. Your responsibility must be assigned filter access for node.

## Steps

1. Use one or more drop down Quick Filter selectors to set filter criteria by specifying values for each Quick Filter attribute.
2. Press the Apply Filter button to apply the filter settings.
3. The node's Summary Table will refresh, applying the filter settings.

**Note:** Use Node Counts. Node counts always show the current qualified work items for a given node. It is possible to set filter criteria that exclude all qualified work items. In the course of your work, you may close all of the qualified work that meets the current filter criteria.

**Note:** Quick Filter selectors always show the current filter criteria, unless you are in the process of changing filter values and have not yet pressed apply.

## Clearing Quick Filters

Use this procedure to clear the quick filters that you have applied.

## Login

Oracle Forms Applications

## Responsibility

Customer Support or TeleSales Agent

## Prerequisites

Node must support filters. You must be configured to access quick filters. Your responsibility must be assigned filter access for node.

## Steps

1. Press the Clear Filter toolbar icon or use Tools menu Clear Filter option to immediately clear current filters.
2. Quick Filter attribute values will be cleared.

3. Summary Table will refresh to show all current qualified work for the node.

## Restoring the Default Quick Filter

Use this procedure to restore the default quick filter to your work view.

### Login

Oracle Forms Applications

### Responsibility

Customer Support or TeleSales Agent

### Prerequisites

Node must support filters. You must be configured to access quick filters. Your responsibility must be assigned filter access for node.

### Steps

1. Press the Restore Filter toolbar icon or use Tools menu Restore Filter option to immediately clear current filters.
2. Quick Filter attribute values will change to reflect your default node setting.
3. Summary Table will refresh to show qualified work for the node.

**Note:** Use Node Counts. Node counts always show the current qualified work items for a given node. It is possible to set filter criteria that exclude all qualified work items. In the course of your work, you may close all of the qualified work that meets the current filter criteria.



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