Oracle CX

Understanding Scheduled Processes

21D
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons 🎧 to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons.

If you don't see Show Help Icons in the Settings and Actions menu, you can access the Oracle Help Center to find guides and videos.

Watch: This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>
Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

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Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Oracle Accessibility Learning and Support if you are hearing impaired.

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1 About This Guide

Audience and Scope

This guide describes the scheduled processes of Oracle CX and contains guidance on how to use them. You can use this as a reference while working with scheduled processes. This guide describes what a schedule process does, the roles that can access the scheduled process, and any prerequisites. It also describes the parameters of a scheduled process and indicates whether they're mandatory.

**Note:** Some CX Sales and B2B Service scheduled processes are documented within the context of procedures that require them. If your process isn't documented in this guide, check the relevant implementation or administration guides for more information.

Related Guides

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding Import and Export Management for CX Sales and B2B Service</td>
<td>Describes how to import legacy and other data into Oracle CX Sales and B2B Service using Import and Export Management, and export data out of these applications.</td>
</tr>
<tr>
<td>Implementing Sales</td>
<td>Describes tasks to configure and set up Sales.</td>
</tr>
<tr>
<td>Getting Started with Your Sales Implementation</td>
<td>Describes how to set up sales automation capabilities in Oracle CX using a case study to describe concepts and procedures.</td>
</tr>
<tr>
<td>Using Sales</td>
<td>Describes user tasks to help sales managers, salespeople, and other sales end users perform day-to-day business tasks.</td>
</tr>
</tbody>
</table>
2 Manage Scheduled Processes

Overview of Scheduled Processes

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends. Some scheduled processes give you printable output. Those processes might have Report in their name.

Jobs and Job Sets

Each scheduled process that you run is based on a job. The job is the executable that controls what the process can do and what parameters and other options you have for the process. A job set contains multiple jobs.

You or your administrator can create job definitions for Oracle Business Intelligence Publisher reports so that people can run the reports as scheduled processes.

Process Sets

A process set is a scheduled process that's based on a job set. So, when you submit a process set, you're running more than one job.

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

Submission

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

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

Output

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

Related Topics

- Create Job Definitions to Run Reports as Scheduled Processes
Process Sets

A process set is a type of *scheduled process* that's based on a job set and contains at least two processes. So you can run many processes in one go, for a specific purpose. These processes run in a certain order, in serial or parallel, or by some other logic. For example, let's say we have a process set with three processes to do these three tasks:

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

What They Contain

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

Submit Scheduled Processes and Process Sets

Watch video

Use the Scheduled Processes work area to run all the *scheduled processes* that you have access to, including *process sets*. You can also submit many processes from other work areas. Some of the processes that give you output are also reports that you can view from the Reports and Analytics work area or *panel tab*. You can find that panel tab in some work areas.

It's quick to submit a scheduled process with the bare minimum steps. But there are many additional options you can set, for example, if you want to run the process on a schedule.

Select the Scheduled Process and Define Parameters

Here's what you do:

1. Click *Navigator > Tools > Scheduled Processes*.
2. On the Scheduled Processes Overview page, click *Schedule New Process*.
3. Leave the type as **Job**, select the process that you want to submit, and click **OK**.
4. In the **Process Details** dialog box, enter at least the required parameters, if any.
   - Some processes have no parameters at all.
   - Some parameters depend on other parameters. For example, date range parameters might appear only after you select **By Date** for another parameter.
5. Click the Advanced button if you want to define the schedule, notifications, or output. Continue to the next steps. Or, just skip to the steps for finishing the submission, to run the process once as soon as possible with the default output.
Define the Schedule

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

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

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

Define the Output

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

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

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

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

Set Up Notifications

You can have notifications sent out depending on how the process ends. Use the Process Details dialog box in Advanced mode to set that up.

1. Open the Notification tab.
2. Click **Create Notification**.
3. In the **Recipient** field, enter the user ID of the person you want to send the notification to.
4. In the **Condition** list, select when to send the notification, for example when the process ends in error.
5. Click **OK**.
6. To send notifications to more people, repeat steps 2 to 5.

Finish the Submission

Follow these steps in the Process Details dialog box:

1. Click the Process Options button if you want to define settings that affect the data to be processed.
2. If the process gives you output and you want to print it, select the Print output check box and a printer.
3. Select the Notify me when this process ends check box if you want to get an email notification.
4. Enter submission notes to capture any information you want to associate with this submission. You can use your notes to find this submission later.
5. Click Submit.
6. Click OK to confirm.

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

Submit Process Sets

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

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

Related Topics

- View Analytics, Reports, and Dashboards

Examples of Process Options

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

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

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

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

Currency

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

Example of Process Details for a Process Set

When you’re submitting a process set with the Process Details dialog box, you can open the Processes tab to see what’s in the process set. There’s a list of all the jobs in the job set that the process set is based on. Every job and job set in the job set that you’re submitting is considered a step and has a unique step ID.

- The Path column shows the step ID of the job, preceded by the step IDs of its parent job sets.
  
  Tip: If a job shows up more than once in the process set, use the path information to differentiate between those instances.

- The Job Set column shows the direct parent of each job in the process set.

Scenario

Let’s try to understand what we are looking at in the Processes tab. Say you’re submitting a process set based on a job set called Full Cleanse and Import, which contains a job set and two jobs, with one of the jobs showing up twice:

- Clean Records job (with a step ID of CleanRec1)
- Quick Import job set (QuickImp1), which has two jobs:
  - Import Records job (ImpoRec1)
  - Clean Records job again (CleanRec1)

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

<table>
<thead>
<tr>
<th>Job Definition</th>
<th>Path</th>
<th>Job Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean Records</td>
<td>CleanRec1</td>
<td>Full Cleanse and Import</td>
</tr>
<tr>
<td>Import Records</td>
<td>QuickImp1.ImpoRec1</td>
<td>Quick Import</td>
</tr>
</tbody>
</table>
Manage Processes and View Output

Statues of Scheduled Processes

After you submit a scheduled process, it can go through many statuses until it reaches a final state. This table explains the statuses you might see. The Action Required column tells you if something can be done for the process:

- **No (in progress):** The process was submitted and hasn't reached a final state yet. But you or administrators don't need to do anything to move the process along.
- **Yes:** You or administrators need to do something to get the process to another status.
- **No (final):** The process has reached a final state, and nothing else can be done.
<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Action Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expired</td>
<td>The process didn't run and its schedule already ended. You can't restart it, but you can resubmit with the same parameters or submit a new process.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Finished</td>
<td>The process ran based on a schedule, and it's either a process set or a process that causes other processes to automatically run. Either way, all processes involved are done running.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Hold</td>
<td>The process is put on hold and needs someone to release it before it can continue running.</td>
<td>Yes</td>
</tr>
<tr>
<td>Paused</td>
<td>The process is paused so that another process that was automatically kicked off can run first.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Pending Validation</td>
<td>Some validations, for example related to security, are performed on the process before it runs.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Ready</td>
<td>The process passed validation and is about to start running.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Retrying</td>
<td>The process resulted in an error but will try again. It will automatically rerun at the time you see in the Scheduled Time column on the Scheduled Processes Overview page. The number of retries depends on how the job is set up. After all the retries, if the process still can't run successfully, it will end with the Error status.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Running</td>
<td>The main part of the process is currently running.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Schedule Ended</td>
<td>The last submission in a schedule has happened for a process that's either a process set or a process that causes other processes to automatically run. Either way, all processes involved have started running, but might not be done yet.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Succeeded</td>
<td>The process successfully completed.</td>
<td>No (final)</td>
</tr>
<tr>
<td>Validation Failed</td>
<td>The process failed validation.</td>
<td>No (final)</td>
</tr>
</tbody>
</table>
### Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Action Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wait</td>
<td>The process passed validation but isn't running yet.</td>
<td>No (in progress)</td>
</tr>
<tr>
<td>Warning</td>
<td>The process finished running and ended with a warning, for example, that a notification wasn't sent.</td>
<td>No (final)</td>
</tr>
</tbody>
</table>

#### View Status and Other Details for Scheduled Processes

After you submit a *scheduled process*, you can track its progress. Processes can finish running in seconds, or a few minutes, or even longer. If something interrupts a process while it's running, for example a server restarting, then the process automatically picks up where it left off. If you need to see all processes, not just the ones you submitted, ask your security administrator to assign you a custom role that has the ESS Monitor Role (ESSMonitor) or ESS Operator Role (ESSOperator).

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

- Scheduled Processes work area
• Other work areas with a section for scheduled processes, if available

Here's an example of the section that you can find in some other work areas.

Check the Status in the Scheduled Processes Work Area
Here's how you find your scheduled process and see how it's doing.

1. Click Navigator > Tools > Scheduled Processes.
The Search Results table shows processes that match the default saved search, **Last 24 hours**.

- The table might be blank if nothing was submitted.
- If submission notes were entered when submitting the process, you can use the **Submission Notes** column to help identify the process.

2. If you don’t see the process, click the **Refresh** icon or use the Search section.

- For the search, enter your own criteria or select another saved search, including these:
  - Last hour
  - Last 48 hours
  - Last 72 hours
  - Cancelable Processes
- Refresh the search results at any time to see the latest status of the process in the **Status** column.

3. Do any of these tasks to check on the progress of the process:

- For more details about the status, click the status link. For example, if a process is in the Ready status, you can click the **Ready** link in the **Status** column to see where the process is in the submission queue.
- Check the **Start Time** column to see if the process has started running yet.
- In the Search Results table, find the **This Job’s Items Processed / Errors / Total** column. For some scheduled processes, this column shows what’s getting processed and how things are going. For example, if the value is **Lines 50/2/?**, then this is what that means:
  - The scheduled process is processing lines, for example lines from a file that’s getting imported.
  - 50 lines are successfully processed.
  - Two lines ended up in error.
  - The total number of lines to process is unknown right now. If 100 was displayed instead of the question mark, that would mean there are 100 lines in total, 52 of which are already processed, and 48 more to go.

Even after the scheduled process reaches a final state, the first two numbers might not add up to the total, for many reasons. For example, if you cancel the process before it’s done, then not all items got processed. Or, you have set a process parameter to end the process if at least 50% of the items getting processed ends in error. In which case, the scheduled process itself could still successfully end, but not everything was actually processed.

- Click the **View Log** button, especially if your process has a blank **This Job’s Items Processed / Errors / Total** column. The type of information in the log varies, depending on the process. You can open the log from here only for if the process is currently running. When the process is done, you might want to also take a look at the final log, if any, from the Details section.

**View Other Details in the Scheduled Processes Work Area**

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

- Completion text, which is automatically generated when the process reaches a final state. What you see depends on the process. For example, it might say that the process finished 1792 records in less than a second.
- The log attachment, for example for details about why the process ended in error.
- Report output that the process generated, if any.
Monitor Scheduled Processes in Other Work Areas

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

1. Go to the section if it's available, usually on the landing page of the work area.
2. Click the Refresh icon if you don't see any processes or need to see the latest status.
   - If you still don't see the process you're looking for, try changing the filters. If that doesn't help, use the Scheduled Processes work area instead.
   - If submission notes were entered when submitting the process, you can use the Submission Notes column to help identify the process.
3. Do either of these things to check on the progress of the process:
   - For more details about the status, click the status link. For example, if a process is in the Ready status, you can click the Ready link in the Status column to see where the process is in the submission queue.
   - Check the Start Time column to see if the process has started running yet. If it has, you can click the link in the View Log column to get information about how the process is running.

Cancel or Make Changes to Scheduled Processes

Life is full of second chances! After a schedule process is submitted, you can still cancel it or make other changes in the Scheduled Processes work area. What you can do to the process depends on its status. Also, depending on what you have access to, you can even work on processes that someone else submitted. If you need to cancel processes that someone else submitted, ask your security administrator to assign you a custom role that has the ESS Administrator Role (ESSAdmin).

Make Changes to Processes

Select the scheduled process in the Search Results table.

- If the process hasn't started running yet, you can still use the Actions menu to change the schedule or output.
  - Edit Schedule: Change the submission schedule, for example to submit it biweekly instead of weekly.
  - Edit Output: If the process generates output, you can change output options, for example from HTML format to PDF.
- If the process is running, you can click Put On Hold to pause it, or Release Process so that a process that's on hold continues to run.

Cancel a Process

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

If you submitted a process to run on a schedule, for example once a day, you can cancel the scheduled runs even if some of the runs already happened. Find the original submission, the row with the process ID you got when you
submitted the process. The status should be Wait. When you cancel this original submission, you cancel any current and future runs based on the schedule you had set.

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

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

Some processes run on a remote server. When you click **Force Cancel**, even though the status is changed to Canceled, the process might still be running on the remote server. With the scheduled process still selected in the Search Results table, you check the status of the remote process in the Details section that appears after the table. The **Remote Status** field might display any of these statuses for the remote process (not for your scheduled process):

- **Completed Successfully**: The remote process was successfully canceled within the 30 minute grace period.
- **Running/Unknown**: Your scheduled process is in a Canceled state, but the remote process is still running.
- **Terminated**: Your scheduled process is in a Canceled state, and the remote process is successfully canceled after the 30 minute grace period.

**Cancel Processes in Bulk**

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

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

**View Output from Scheduled Processes**

Other than processing records, some **scheduled processes** also give you output. When you submit the process, you can select the output layout and format, and set other output options. In the Scheduled Processes work area, you can view the output and even republish it in a different format without resubmitting the process. You might be able to see the output from other work areas too.
When You're In the Scheduled Processes Work Area

Here's what you do:

1. Click **Navigator > Tools > Scheduled Process**.
2. Find your scheduled process and, if you need to, refresh the search results to see the latest status.
3. Select the scheduled process.
4. Go to the Output subsection in the Details section.
5. Click the link in the **Output Name** column to view or download the output, which you can then print.
6. To view or export the output in a different format:
   a. Click the **Republish** button.
   b. Click the **Actions** icon.
   c. Select **Export**, and then select a format.

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

When You're In Other Work Areas

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

Resubmit Scheduled Processes and Process Sets

You can easily resubmit *scheduled process* using the exact same parameter values, if the process has a Succeeded status and wasn't part of a submission involving other processes. For *process sets*, you can also resubmit after changing any of the parameters or other options.

Resubmit Processes

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

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

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

Resubmit Process Sets

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

1. Click **Navigator > Tools > Scheduled Processes**.
2. See process details, including parameter values, for the processes that ran as part of your process set.
3. In the Search Results table, select your process set.
4. Click **Resubmit**, and you’re done. Or, click the **Resubmit** drop-down button and select **Resubmit with Changes**.
   a. In the Process Details dialog box, select a process on the Processes tab.
b. Change any of the parameters.
c. Repeat and change parameters for any of the other processes in the process set.
d. Define anything else as part of the submission, for example the schedule.
e. Click Submit.

Both options to resubmit are available for process sets in either of these situations:
- Has any of the statuses in a final state, for example Succeeded or Canceled
- Ran based on a schedule and has either the Wait or Schedule Ended status

FAQs for Scheduled Processes

Why are scheduled processes shown in a hierarchy?

A scheduled process with child nodes might be a process set. The hierarchy shows you the structure of nested processes or process sets within that process set.

Or, when a scheduled process runs, it might cause other processes to run automatically. So those other processes are child nodes for the original process.

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

Here's what you do:

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

Tip: If you see any difference between the spreadsheet and the Search Results table, refresh the table and then compare again.
3 Sales and B2B Service Scheduled Processes

Where to Find Information About CX Sales Scheduled Processes

Here are the scheduled processes that are available as part of Oracle CX Sales. The Oracle CX Understanding Scheduled Processes guide describes many of these scheduled processes and contains guidance on how to use them. However, some CX Sales scheduled processes are documented within the context of procedures that require them, in the relevant implementation or administration guides.

Assignment
- See: Improve the Performance for Territory-Based Account Assignment
- See: Perform Object Sharing Rule Assignment Processing
- See: Request Account Assignment
- See: Request Opportunity Resource Assignment
- See: Request Revenue Territory Assignment
- See: Run Access Group Membership Rule

Forecasting
- See: Check Due Date
- See: Forecast Autopilot
- See: Refresh Forecast

Marketing Campaigns and Leads
- See: Populate Lead Latitude and Longitude Information

Partner Management
- See: Partner Program Enrollment Expiration Job
- See: Refresh Partner Dimension Members

Quota Management
- See: Publish or Revise Hierarchy Quotas
- See: Synchronize Quotas
Sales Insights
• See: Generate Sales Insight Facts
 • See: Generate Sales Insight Facts Using Signals
 • See: Generate Sales Insight Metrics
 • See: Purge Redundant Sales Insight Facts

Territories
• See: Delete Territory Proposal
 • See: Refresh and Promote Dimension Members
 • See: Refresh Territories from Resources
 • See: Update Inheritance Recipients

Where to Find Information About B2B Service Scheduled Processes
Here are the scheduled processes that are available as part of Oracle B2B Service. The Oracle CX Understanding Scheduled Processes guide describes many of these scheduled processes and contains guidance on how to use them. However, some B2B Service scheduled processes are documented within the context of procedures that require them, in the relevant implementation or administration guides.

Knowledge Management
• See: Knowledge Article View Aggregation
 • See: Knowledge Content Batch Process
 • See: Knowledge Search Batch Process

Service Request Management
• See: Aggregate Service Requests
 • See: Execute Full Load of Cross-Channel Interaction Data for Reporting
 • See: Execute Full Load of HCM Person Mapping Data for Reporting
 • See: Execute Incremental Load of Cross-Channel Interaction Data for Reporting
 • See: Execute Incremental Load of HCM Person Mapping Data for Reporting
 • See: Execute Incremental Load of SR Audit Data for Reporting
Where to Find Information About All Common CX Scheduled Processes

Here are the scheduled processes that are common to both CX Sales and B2B Service. The Oracle CX Understanding Scheduled Processes guide describes many of these scheduled processes and contains guidance on how to use them. However, some of these scheduled processes are documented within the context of procedures that require them, in the relevant implementation or administration guides.

Applications Common Components
  • See: Generate Appointment Reminders

Application Composer
  • See: Schedule Custom Groovy Object Functions

Customer Center
  • See: Update Mass Transfer Request Status

Customer Data Model
  • See: Audit Party Hierarchy
    See: Classification Hierarchy Generation
    See: Cleanse Addresses Against Postal Reference Files
    See: Delete Child Entities of Inactive Party Records
• See: Delete or Truncate Interface Tables
  See: Flatten HZ_GEO_HIERARCHY_CF Columns
  See: Generate Data Quality Keys
• See: Identify Duplicate Organization Person or Location Records
  See: Import Bulk Customer Data
  See: Maintain Party and Location Current Record Information
  See: Party Hierarchy Generation
• See: Purge Cleanse and Match Batch Data
  See: Purge Data Quality Keys
  See: Purge Inactive Party Records
  See: Populate Location Latitude and Longitude Information
• See: Reporting Hierarchy Generation
  See: Synchronize Financials Accounts and Contacts with CX Cloud
  See: Synchronize User GUID
  See: Validate Geographies of Addresses Against Master Geographies

Microsoft Office 365
• See: Microsoft 365 Instant Sync
  See: Microsoft 365 Standard Sync
  See: Microsoft 365 Token Refresh

SaaS Enablement
• See: Create Company Information
  See: Load and Update Oracle Fusion CRM Cloud Metrics

User Context
• See: Age User Context Relevancy Feed

Applications Common Components
Generate Appointment Reminders

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

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

When to Use

This scheduled process

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

Privileges Required

Verify that you have the following privileges or roles:

- Roles:
  - Customer Relationship Management Application Administrator
- Privileges:
  - ZCA_RUN_APPOINTMENT_REMINDER_PRIV

Before You Start

Review the following before scheduling this scheduled process:

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

Parameters

None.

Troubleshooting Information

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

Related Topics

- Set Up Activity Notifications
Application Composer

Schedule Custom Groovy Object Functions

Use the Schedule Custom Groovy Object Functions scheduled process to make an asynchronous call to an external web service using an object function at a scheduled time. You can optionally define object functions to return values. You can also specify typed parameters, which the caller will be required to provide values for, when the function is invoked. The supported return types and optional parameter types are the same as for global functions. However, scheduled processes only support object functions that have no parameters and that have String as the return type, if the function is defined to return values. So, if you're defining an object function to be used in a scheduled process, ensure that it has no parameters defined, and if you're defining the function to return a value, ensure that its return type is String.

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

- Record the API name of the object as the object name.
- Record the object function name.
- Ensure that the object function compiles and runs properly using validation or trigger invocation mechanism within Application Composer, where runtime message debugging is supported.
- Test capacity runs to determine the best batch size to handle large data set.

Privileges Required

Verify that you have the following roles:

- Customer Relationship Management Application Administrator
- Application Implementation Consultant
- Master Data Management Application Administrator

Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- Call the web service using an object function at a scheduled time using the Scheduled Processes tool. You can process a set of records on a daily or weekly basis, asynchronously, when users don't need to see immediate feedback in the user interface.

Execution Time:

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

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

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

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

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

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

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

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

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

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

   For example, a simple custom object with very few attributes and no related parent, child, associated objects incurs the least cost whereas an out-of-the-box standard object such as Opportunity, with large number of attributes and multiple child and associated object relationships (such as account, contact, and lead) incurs a higher search and update cost. In terms of type of operations, insert operations incur the highest cost, followed by updates, followed by reads, with the cost increasing as amount of data processed increases. For update operations, the amount of data that can be processed depends on the cost of search operation and cost of updates, with the former dictated by the view criteria and latter by the operations performed on the result set obtained from the search, as specified by the Groovy script in the object function. Database update operation is dependent on the type of operation specified in the object function. Reads don't incur any database update cost whereas insert and update operations do, increasing with the data complexity.

2. Determine how long each job takes to complete. Besides data size, the type of database operations needed to support the object function can greatly affect the completion of the job. Database data creation, updates,
and deletes (when permitted by business rules) normally take a longer time to complete than data reads. The amount of time needed to complete database updates and creates transactions can far exceed that of the object function execution time. This cost is particularly high for cases where object data complexity is high. These costs are often seen in job completion times that far exceed the 30 minute limit. The time interval between the scheduled time and completion time of the job is the time taken to complete the job.

3. Schedule each job to run slightly over the job completion time. To ensure that the previous job is completed, it’s best to add a few extra minutes to the job completion time obtained in step 2 while scheduling each job.

### Parameters

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

### Troubleshooting Information

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

Perform Object Sharing Rule Assignment Processing

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

When to Use

Use this scheduled process in the following cases:

- After creating an access group, you can create rules to provide the group with access to an object's records. You can define rules for both standard and custom objects. To create an object sharing rule, you specify the type of object access to be provided, the conditions under which the access is provided, and the groups to share the rule with. You then publish the rule to Assignment Manager. Finally, you run the Perform Object Sharing Rule Assignment Processing task to enable the resources in the associated access group to have access to the object data records. This scheduled process ensures that the access group sharing rules for each object are assigned properly.

- You can edit, delete, or inactivate object sharing rules at any time from either the Object Sharing Rules page or from the Edit Access Group: Object Sharing Rules subtab. Any changes you make are applied when the Perform Object Sharing Rule Assignment Process scheduled process is next run.

- Create access extension rules to extend the access defined for an object in an object sharing rule to a related object. For example, if you have secured access to an object such as Account using object sharing rules, you can extend the access defined for the Account object to a related object, such as Activity, by creating an access extension rule. All members of an access group who can access account data will then have access to activity data for the account with the access level you choose in the access extension rule. Run the Perform Object Sharing Rule Assignment Processing scheduled process to ensure that the access extension rule is assigned.

- You can also run this scheduled process to assign a batch of access group object sharing rules for all the available assignment objects. You can schedule these jobs to run regularly to ensure that all access group object sharing rules, records, and object data for your selected access groups are assigned and available to you.

Privileges Required

Verify that you have the following roles or privileges:

- Roles:
  - System Administrator

- Privileges:
  - No special privileges required

Before You Use

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You must run this process periodically as per your business requirements to ensure you have the required access to all records and object data for your selected access groups.
If you require immediate access to new records and objects, you can manually submit the Perform Object Sharing Rule Assignment process to run immediately on need basis. For example, a rule already exists for the account object and you create a new account record. You won’t have real time access to this record based on the existing object rule until the next scheduled run of the Perform Object Sharing Rule Assignment job. If you want to access the new account record immediately, you can submit the job on need basis.

We recommend that you run this scheduled process every hour.

- Compatibility:
  - No known dependencies with other scheduled processes.

### Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
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<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object</td>
<td>Mandatory</td>
<td>Select the work object you want from the drop-down list.</td>
<td>Parameter</td>
<td>Not applicable</td>
<td>None</td>
</tr>
<tr>
<td>Record Selection</td>
<td>Mandatory</td>
<td>You can run the assignment process on a subset of records.</td>
<td>All records</td>
<td>Not applicable</td>
<td>None</td>
</tr>
<tr>
<td>Parameter</td>
<td>Optional or Mandatory</td>
<td>Description</td>
<td>Parameter Values</td>
<td>Special Combinations Required</td>
<td></td>
</tr>
<tr>
<td>-----------</td>
<td>-----------------------</td>
<td>-------------</td>
<td>------------------</td>
<td>------------------------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note: You might want to run the object sharing rule assignment process for an individual record (for each type of object) and confirm the access group rule processing is correct before processing all records for an object.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Enter a record selection value for these options:
  - Records updated in last 'X' days
  - Records updated in last
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Selection Value</td>
<td>Optional</td>
<td>Applicable if you select any value in the Record Selection field except All.</td>
<td>None</td>
<td>Not applicable</td>
<td>None</td>
</tr>
<tr>
<td>Number of Work Objects per Sub Process</td>
<td>Optional</td>
<td>It is recommended that this value isn't changed. This number depends upon the Maximum Sub Processes per Process parameter's value.</td>
<td>Thousand is the default value.</td>
<td>Not applicable</td>
<td>None</td>
</tr>
<tr>
<td>Maximum Sub Processes per Process</td>
<td>Optional</td>
<td>If the number objects created is less than 500 thousand, then leave the default option of 2 as the maximum number of sub processes per process. The following recommendation is only applicable for when this process is run for the first time or for a complete run for all objects. However, the next time you run the process, only the changed objects are processed. If you're executing incremental runs at periodic scheduled times, then there's no need to update the default value of 2.</td>
<td>Two is the default value.</td>
<td>Not applicable</td>
<td>None</td>
</tr>
</tbody>
</table>
### Oracle CX

#### Understanding Scheduled Processes

## Chapter 3

### Sales and B2B Service Scheduled Processes

<table>
<thead>
<tr>
<th>Parameter</th>
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<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diagnostic Mode</td>
<td>Optional</td>
<td>Used for troubleshooting purposes.</td>
<td>Not applicable</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process:

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

**Related Topics**

- Batch Assignment Progress Report
- Batch Assignment Error Report

**Request Account Assignment**

Use the Request Account Assignment scheduled process to request territory assignments for specified accounts. An account represents a company or person you sell to. If your business sells to a contact or household, an account
represents the contact and household you sell to. Assignment manager lets you assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. You can use assignment rules defined for accounts only to filter the territories that are assigned to accounts.

When to Use
Use this scheduled process in the following cases:

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

Privileges Required
Verify that you have the following roles or privileges:

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

Before You Start
Review the following before scheduling this scheduled process:

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

## Parameters

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Work Object</td>
<td>Mandatory</td>
<td>Specify a predefined work object or the one you created.</td>
<td>Account</td>
<td>None</td>
</tr>
<tr>
<td>Candidate Object</td>
<td>Mandatory</td>
<td>Specify the candidate object.</td>
<td>Account Territory</td>
<td>None</td>
</tr>
<tr>
<td>Assignment Mode</td>
<td>Mandatory</td>
<td>Specify the assignment mode.</td>
<td>Territory</td>
<td>None</td>
</tr>
<tr>
<td>Rule Category Name</td>
<td>Optional</td>
<td>Specify if you're using rule-based assignment.</td>
<td>Don't select any value.</td>
<td>None</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>Mandatory</td>
<td>Specify a view criteria name from the View Criteria table.</td>
<td>See the View Criteria table.</td>
<td>None</td>
</tr>
<tr>
<td>View Criteria Bind Values</td>
<td>Optional</td>
<td>Specify the view criteria bind values of the associated view criteria name from the View Criteria table.</td>
<td>See the View Criteria table.</td>
<td>None</td>
</tr>
<tr>
<td>Replace Team</td>
<td>Optional</td>
<td>Specify the replace team information.</td>
<td>Yes or No</td>
<td>None</td>
</tr>
<tr>
<td>Number of Work Objects per Sub Process</td>
<td>Optional</td>
<td>It is recommended that this value isn't changed. This number depends upon the Maximum Sub Processes per Process parameter’s value.</td>
<td>Thousand is the default value.</td>
<td>None</td>
</tr>
<tr>
<td>Maximum Sub Processes per Process</td>
<td>Optional</td>
<td>If the number objects created is less than 500 thousand, then leave the default option of 10 as the maximum number of sub processes per process. The following recommendation is only applicable for when this process is</td>
<td>Ten is the default value.</td>
<td>None</td>
</tr>
</tbody>
</table>
### Oracle CX

#### Understanding Scheduled Processes

**Chapter 3**

**Sales and B2B Service Scheduled Processes**

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<table>
<thead>
<tr>
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<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>run for the first time or for a complete run for all objects. However, the next time you run the process, only the changed objects are processed. If you're executing incremental runs at periodic scheduled times, then there's no need to update the default value of 10.</td>
<td>Don't change this value. 100 is the default value.</td>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oracle recommends changing this value if the number of objects is:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Between 500 thousand and 1 million objects enter 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Greater than 1 million objects, enter 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Greater than 5 million objects, enter 20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Greater than 10 million objects, enter 30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Metrics Logging Interval</th>
<th>Optional</th>
<th>Used for internal purpose only.</th>
<th>Don't change this value. 100 is the default value.</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Data Parameters</td>
<td>Optional</td>
<td>Used for internal purpose only.</td>
<td>Don't change this value.</td>
<td>None</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Optional</td>
<td>Used for troubleshooting purposes.</td>
<td>Not applicable.</td>
<td>None</td>
</tr>
</tbody>
</table>

**View Criteria Name**  
**View Criteria Description**  
**View Criteria Bind Values**  
**Recommended Run Frequency**

<p>| SalesAccountsUpdatedSince | Use this view criteria to assign accounts which haven't been previously assigned and have LAST_UPDATED_DATE is greater than or equals the | BindLastUpdateDate=[YYYY-MM-DD HH:MM:SS] | Daily |</p>
<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
<th>Recommended Run Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccountsAssignedBeforeVC</td>
<td>Use this view criteria to reassign accounts which have been previously assigned and have LAST_ASSIGNED_DATE (in the ZCA_SALES_ACCOUNTS table) less than the specified date.</td>
<td>BindLastAssignedDate=YYYY-MM-DD, BindReassignmentBatchId=[Territory Reassignment Batch ID]</td>
<td>Daily</td>
</tr>
<tr>
<td>SalesAccountTerritoryBatchReassignmentVC</td>
<td>Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch. This view criteria is also used internally to initiate immediate or automatic assignments after territory proposal activation and territory dimension updates.</td>
<td>BindReassignmentBatchId=[Territory Reassignment Batch ID]</td>
<td>Run as per business requirements</td>
</tr>
<tr>
<td>SalesAccountBulkImportVC</td>
<td>Use this view criteria to assign accounts created in a given customer import batch. This view criteria is also used internally to initiate immediate/automatic assignments after customer import.</td>
<td>BindReassignmentBatchId=[Import Activity ID]</td>
<td>Run as per business requirements</td>
</tr>
<tr>
<td>SalesAccountDimsForPartyVC</td>
<td>Use this view criteria to assign the account with the specified account ID.</td>
<td>BindPartyId= [Sales Account ID]</td>
<td>Run as per business requirements</td>
</tr>
</tbody>
</table>

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process:

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

**Related Topics**

- Batch Assignment Progress Report
Request Opportunity Resource Assignment

Use the Request Opportunity Resource Assignment scheduled process to run rule-based assignment on opportunities. During this process, assignment processing executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for opportunities. If matching candidates are found, they’re added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

When to Use
This scheduled process:
• Assigns sales resources to an opportunity based on a set of rules such as assigning sales team members, including the opportunity owner.

Privileges Required
Verify that you have the following roles or privileges:
• Roles:
  o Sales Administrator
  o Setup User

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

Parameters

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

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

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
<th>Recommended Run Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpenOpportunitiesUpdatedInLastNDays</td>
<td>All open opportunities which were updated in the last 30 days. Optionally, the user can enter a different number of days.</td>
<td>• BindOptyUpdatedSince&lt;br&gt;For example, opportunities updated in last 15 days: BindOptyUpdatedSince</td>
<td>Daily</td>
</tr>
<tr>
<td>OpenOpportunitiesUpdatedInLastNHours</td>
<td>All open opportunities which were updated in the last N hours.</td>
<td>• BindOptyUpdatedWithin&lt;br&gt;For example, opportunities</td>
<td>Multiple times per day</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>View Criteria Description</td>
<td>View Criteria Bind Values</td>
<td>Recommended Run Frequency</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>number of hours. Optionally, the user can enter a different number of days.</td>
<td>updated within the last 6 hours: BindOptyUpdatedWithin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OpportunityForImportBatchVO</td>
<td>All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory.</td>
<td>BindBatchId</td>
<td>Run on need basis as per business requirements</td>
</tr>
<tr>
<td>OpenOpportunitiesByCreationDate</td>
<td>Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range.</td>
<td>BindOptyCreationDateTo [sysdate], BindOptyCreationDateFrom [sysdate-90] For example: BindBatchId=5618782</td>
<td>Daily</td>
</tr>
<tr>
<td>OpenOpportunitiesByEffectiveDate</td>
<td>Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range.</td>
<td>BindEffectiveDateFrom [sysdate], BindEffectiveDateTo [sysdate] [90] For example: BindOptyCreationDateTo=2015-02-29, BindOptyCreationDateFrom=2015-01-01 or BindOptyCreationDateFrom=2015-01-01. This second example processes all open Opportunities created between January 1, 2015 and the current date.</td>
<td>Daily</td>
</tr>
<tr>
<td>SalesAccountUpdatedInLastNDays</td>
<td>All open opportunities whose sales account got updated in the last 30 days. Optionally, the user can pass a different number of days.</td>
<td>BindSalesAccountUpdatedSince [30] For example, opportunities whose sales account was updated in last 15 days: BindSalesAccountUpdatedSince=15</td>
<td>Daily</td>
</tr>
<tr>
<td>ClosedOpportunitiesByCreationDate</td>
<td>Closed opportunities created in the last 90 days. Optionally, the user can pass a different date range.</td>
<td>BindOptyCreationDateTo [date], BindOptyCreationDateFrom [date-90]</td>
<td>Daily</td>
</tr>
</tbody>
</table>
### View Criteria Name

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
<th>Recommended Run Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>ClosedOpportunitiesByEffectiveDate</td>
<td>Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.</td>
<td>- <strong>BindEffectiveDateFrom</strong>=2015-01-01, <strong>BindEffectiveDateTo</strong>=2015-02-29</td>
<td>Daily</td>
</tr>
<tr>
<td>OpportunitySearchbyOptyNumber</td>
<td>The opportunity with a specific number.</td>
<td>- <strong>BindOpportunityNumber</strong>=1</td>
<td>Run on need basis as per business requirements</td>
</tr>
</tbody>
</table>

### Troubleshooting Information

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

### Related Topics

- Batch Assignment Progress Report
- Batch Assignment Error Report

### Request Revenue Territory Assignment

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

**When to Use**

This scheduled process:
- Runs territory-based assignment on opportunity product lines. During this process, the application evaluates every product line in the opportunity batch. Territories whose dimensions match the dimensional attributes of a given product line are then assigned to that line.
Privileges Required
Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator
  - Setup User

Before You Start
Review the following before scheduling this scheduled process:

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

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

Parameters

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

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

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
<th>Recommended Run Frequency</th>
</tr>
</thead>
</table>
| OpenOpportunities ByCreationDate | Revenue lines of open opportunities created in the last 90 days. | • BindOptyCreationDate=\[date\], BindOptyCreationDateFrom=\[sysdate-90\]  
  • For example:  
    - BindOptyCreationDate=2015-02-29, BindOptyCreationDateFrom=2015-01-01  
    - For example:  
      - BindOptyCreationDate=2015-01-01. This second example processes all open opportunities created between January 1, 2015, and the current date. | Daily |
| OpenOpportunities ByEffectiveDate | Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, you can enter a different date range. | • BindEffectiveDateFrom=\[sysdate\], BindEffectiveDateTo=\[sysdate \{90\}  
  • For example:  
    - BindEffectiveDateFrom=2015-01-01, BindEffectiveDateTo=2015-02-29 | Daily |
<p>| SalesAccountUpdated InLastNDays | Revenue lines of all open opportunities whose sales account was updated in the | • BindSalesAccountUpdatedSince=[30] | Daily |</p>
<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
<th>Recommended Run Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>last 30 days. Optionally, you can enter a different number of days.</td>
<td>For example, opportunities whose sales account was updated in last 15 days: BindSalesAccountUpdatedSince=15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SalesAccountUpdatedInLastNHours</td>
<td>Revenue lines of all open opportunities whose sales account was updated in the last number of hours. Optionally, you can enter a different number of hours.</td>
<td>BindSalesAccountUpdatedSince=6 For example, opportunities whose sales account was updated within last 6 hours: BindSalesAccountUpdatedSince=6</td>
<td>Multiple times per day</td>
</tr>
<tr>
<td>OpenOpportunitiesUpdatedInLastNDays</td>
<td>Revenue lines of all open opportunities updated within the last four hours. Optionally, you can enter a different number of hours.</td>
<td>BindOptyUpdatedWithinHours=[4] For example, open opportunities updated within the last 6 hours: BindOptyUpdatedWithin=6</td>
<td>Multiple times per day</td>
</tr>
<tr>
<td>OpenOpportunitiesUpdatedInLastNDays</td>
<td>Revenue lines of all open opportunities updated in the last 30 days. Optionally, you can enter a different number of days.</td>
<td>BindOptyUpdatedSince=[30] For example, open opportunities updated in the last 15 days: BindOptyUpdatedSince=15</td>
<td>Daily</td>
</tr>
<tr>
<td>FilterByBatchTag</td>
<td>Revenue lines of all open opportunities that contain a specific value in the Batch Tag field.</td>
<td>BindBatchTag = [text] For example, open opportunities that have EMEA in the Batch Tag field: BindBatchTag = EMEA</td>
<td>Run on need basis as per business requirements</td>
</tr>
<tr>
<td>RevenueImportCriteria</td>
<td>Revenue lines of all opportunities imported through the given bulk import batch ID. The view criteria bind value, BatchId, is mandatory.</td>
<td>BindBatchId For example: BindBatchId=5618782</td>
<td>Run on need basis as per business requirements</td>
</tr>
<tr>
<td>ClosedOpportunitiesByCreationDate</td>
<td>Revenue lines of closed opportunities created in the last 90 days. Optionally, you can enter a different date range.</td>
<td>BindOptyCreationDateTo=[date], BindOptyCreationDateFrom=[date] For example: BindOptyCreationDateTo=2015-02-29,</td>
<td>Daily</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>View Criteria Description</td>
<td>View Criteria Bind Values</td>
<td>Recommended Run Frequency</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>ClosedOpportunitiesBy</td>
<td>Revenue lines of opportunities closed in the last 90 days. Optionally, you can enter a</td>
<td>BindOptyCreationDateFrom =2015-01-01</td>
<td>Daily</td>
</tr>
<tr>
<td>EffectiveDate</td>
<td>different date range.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Revenue lines of opportunities closed in the last 90 days. Optionally, you can enter a</td>
<td>BindEffectiveDateFrom = [date], BindEffectiveDateTo = [date]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>different date range.</td>
<td>For example: BindEffectiveDateFrom = 2015-01-01, BindEffectiveDateTo = 2015-02-29</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Revenue lines of an opportunity with a specific number.</td>
<td>BindOptyNumber = [number]</td>
<td>Run on need basis as per</td>
</tr>
<tr>
<td>FilterByOptyNumber</td>
<td>Revenue lines of an opportunity with a specific number.</td>
<td>BindOptyNumber = [number]</td>
<td>business requirements.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BindOptyNumber = 17001</td>
<td>Usually run while</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>troubleshooting in</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>diagnostic mode.</td>
</tr>
</tbody>
</table>

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process:

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

**Related Topics**

- Batch Assignment Progress Report
- Batch Assignment Error Report

**Run Access Group Membership Rule**

Use the Run Access Group Membership Rule scheduled process to ensure that the access group membership rules are assigned and resources are added to a newly created group. After this process is run, all resources that meet the specified condition criteria are added to the access group.

**When to Use**

This scheduled process:

- To ensure that the access group membership rules are assigned and resources are added to the group.

** Privileges Required**

Verify that you have the following roles or privileges:

- Roles:
  - Sales Administrator
Before You Start
Review the following before scheduling this scheduled process:

- **Recommended Frequency:**
  - It's best practice to schedule the process to run every 24 hours for all records updated in the previous 24 hours.
  - We recommend that you run this schedule process immediately after you edit the access membership rules.

- **Compatibility:**
  - Don't schedule or start the Run Access Group Membership Rules process at the same time as the Reporting Hierarchy Generation scheduled process. The Reporting Hierarchy Generation process updates the reporting hierarchy in accordance with changes to the internal resource or partner organization hierarchies and impacts the assignment of access group membership rules if both processes run at the same time.

### Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Selection</td>
<td>Mandatory</td>
<td>Specify the record.</td>
<td>Select a value.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Record Selection Value</td>
<td>Optional</td>
<td>Specify the record value.</td>
<td>Select a value.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Number of Work Objects per Sub Process</td>
<td>Optional</td>
<td>Specify the number of work objects per sub process.</td>
<td>Recommend that you use the default values.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Maximum Sub Processes per Process</td>
<td>Optional</td>
<td>Specify the maximum number of sub processes per process.</td>
<td>Recommend that you use the default values.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Optional</td>
<td>Used only for troubleshooting purposes.</td>
<td>Not applicable.</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
Troubleshooting Information
Use this information to troubleshoot the scheduled process:
- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about these reports, see the Related Topics section.

Related Topics
- Batch Assignment Progress Report
- Batch Assignment Error Report

Customer Center

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

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

Privileges Required
Verify that you have the following roles:
- Sales Administrator

Before You Start
Review the following before scheduling this scheduled process:
Recommended Frequency:
- Run as per need.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Transfer Request</td>
<td>Mandatory</td>
<td>Specify the name of the request.</td>
<td>Select the name from the list of values.</td>
<td>None</td>
<td>This parameter is list of values driven.</td>
</tr>
</tbody>
</table>
Customer Data Model

Audit Party Hierarchy

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

When to Use

This scheduled process:

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

Privileges Required

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

- Roles:
  - ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB
  - ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB
  - ORA_AR_BILLING_MANAGER_JOB
  - ORA_AR_CUSTOMER_ACCOUNT_ADMINISTRATOR_JOB
  - ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
  - ORA_ZCH_DATA_STEWARD_MANAGER_JOB
  - ORA_ZCH_MASTER_DATA_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
  - ORA_ZCH_TRADING_COMMUNITY_DATA_STEWARD_JOB
  - ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB
  - ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB
  - ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB
  - ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB
  - ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB
  - ORA_ZPM_CHANNEL_SALES_MANAGER_JOB

- Privileges:
  - ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY
  - ORA_MANAGE_TRADING_COMMUNITY_IMPORT_PROCESS_DUTY

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
</table>

The status of the selected request is set to Error.
Before You Start
Review the following before scheduling this scheduled process:
  - Compatibility:
    - No compatibility considerations or dependencies.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hierarchy Type</td>
<td>Mandatory</td>
<td>Specifies the types of hierarchy.</td>
<td>Customer Hierarchy</td>
<td>None</td>
<td>This parameter is List of Values driven. PARTY_HIERARCHY_TYPE</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Duns and Bradstreet Hierarchy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Partner Hierarchy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Trading Community Partner Hierarchy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hierarchy Name</td>
<td>Optional</td>
<td>Name of a hierarchy</td>
<td>Any</td>
<td>None</td>
<td>Search and Select</td>
</tr>
<tr>
<td>Hierarchy Version</td>
<td>Optional</td>
<td>Version of the hierarchy.</td>
<td>Default: Active version</td>
<td>None</td>
<td>List of Values</td>
</tr>
<tr>
<td>Hierarchy Status</td>
<td>Mandatory</td>
<td>Status of the hierarchy.</td>
<td>Active</td>
<td>None</td>
<td>List of Values HZ_TREE_STATUS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Inactive</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Default: Active status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batch ID</td>
<td>Optional</td>
<td>Batch identifier</td>
<td>N/A</td>
<td>None</td>
<td>Text Input Field</td>
</tr>
</tbody>
</table>

Troubleshooting Information
Use this information to troubleshoot the scheduled process:
  - Modified hierarchy aren’t validated and displayed. Any gaps are put into logs. No change is made to the tree.
  - You must monitor the status of scheduled process to know that it was successfully completed.
Classification Hierarchy Generation

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

When to Use

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

Privileges Required

Verify that you have the following roles and privileges:

- Role:
  - Administrators who have access to Manage Classification Categories setup task.

- Privilege:
  - Run Trading Community Classification Hierarchy Generation (HZ_RUN_TRADING_COMMUNITY_CLASSIFICATION_REPORTING_HIERARCHY_GENERATION_PRIV)

Before You Start

Review the following before scheduling this scheduled process:

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

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

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classification Category</td>
<td>Optional</td>
<td>Pick class category to be flattened. If not selected, all categories would be flattened.</td>
<td>Valid values from HZ_CLASSCATEGORY table</td>
<td>None</td>
<td>This parameter is List of Values driven.</td>
</tr>
</tbody>
</table>


### Cleanse Addresses Against Postal Reference Files

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

#### When to Use

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

#### Privileges Required

Verify that you have the following privileges or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator

#### Before You Start

Review the following before scheduling this scheduled process:

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

#### Parameters

Batch cleansing parameter are passed by parent Address Cleansing jobs.

### Delete Child Entities of Inactive Party Records

Use the Delete Child Entities of Inactive Party Records scheduled process to delete all associated child entities of inactive party records. Delete child objects and related entities when the parent record is in an inactive or merged status. When you delete parent record like account, contact, household, hub person or hub organization from the UI pages, web services, or file import, all child entities like contact points, relationships, address, source system references and so on aren’t deleted automatically. So, you can delete these records by running this scheduled process on a regular basis.

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

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

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

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

Privileges Required
Verify that you have the following role:
• Master Data Management Application Administrator

Before You Start
Review the following before scheduling this scheduled process:
• Recommended Frequency:
  o You can run this scheduled process based upon your need. This is to inactivate the child entities of the deleted party. So it can be scheduled to run incrementally to inactivate the child entities of inactivated parties.
  o It can also be run ad-hoc based on the need basis.
• Execution Time:
  o This scheduled process takes few minutes for completion for smaller set of data.
  o This scheduled process may take 15 to 30 minutes to process a batch of 100K inactivated parties.
• Compatibility:
  o This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Date</td>
<td>Optional</td>
<td>Specify the starting date in the date range for searching inactive records.</td>
<td>Date</td>
<td>No</td>
<td>None</td>
</tr>
</tbody>
</table>
### Parameter

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Date</td>
<td>Optional</td>
<td>Specify the ending date in the date range for searching inactive records.</td>
<td>Date</td>
<td>No</td>
<td>To Date should be greater than From Date</td>
</tr>
<tr>
<td>Party ID</td>
<td>Optional</td>
<td>Specify the party identifier</td>
<td>Party identifier</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>Party Number</td>
<td>Optional</td>
<td>Specify the party number</td>
<td>Party number</td>
<td>No</td>
<td>None</td>
</tr>
</tbody>
</table>

**Troubleshooting Information**

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

### Delete or Truncate Interface Tables

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

**When to Use**

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

**Privileges Required**

Verify that you have the following privilege or role:

- Master Data Management Application Administrator

**Before You Start**

Review the following before scheduling this scheduled process:

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

Parameters
You might need to specify some of the following parameters:

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

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

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

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

Flatten HZ_GEO_HIERARCHY_CF Columns
You can use this scheduled process to populate column flattened data into the HZ_GEO_HIERARCHY_CF table. You must create a filter criterion to purge records. The records that are to be purged are selected based upon the filter criteria. So, you can't skip creating filters and proceed to purging records.

When to Use
Use this scheduled process to:

• Populate column flattened data into the HZ_GEO_HIERARCHY_CF table. This is useful for the following:
  - Restore missing data in HZ_GEO_HIERARCHY_CF table.
  - Recover from territory assignment errors arising due to missing data in HZ_GEO_HIERARCHY_CF table.
Privileges Required
Verify that you have the following privilege or role:

- Role:
  - Application Implementation Consultant

- Privilege:
  - Run Trading Community Resource Reporting Hierarchy Generation

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process on need basis.

- Compatibility:
  - This scheduled process is self-incompatible and also incompatible with these processes:
    - Group Territory Geographies
    - Territory Geography Import
    - Territory Geography Migration Import

  If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until status until the first instance is completed.

Parameters
None.

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

When to Use
This scheduled process:

- Generates all record keys for account, contact, and address in rebuild for current active configuration.
- Generates new created or updated record keys for account, contact, and address in incremental key generation job for current active configuration.
- Generates record keys for account, contact, and address for a period of time for any selected configuration when required.
Privileges Required
Verify that you have the following privilege or roles:
  - Application Implementation Consultant
  - Master Data Management Application Administrator

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

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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match Configuration</td>
<td>Mandatory</td>
<td>Specify the configuration code.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Start Time</td>
<td>Mandatory</td>
<td>Specify when the scheduled process must start.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>End Time</td>
<td>Mandatory</td>
<td>Specify when the scheduled process must end.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequency</td>
<td>Mandatory</td>
<td>Specify how frequently</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Parameter</td>
<td>Optional or Mandatory</td>
<td>Description</td>
<td>Parameter Values</td>
<td>Special Combinations Required</td>
<td>Notes</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------</td>
<td>-------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Time Between Runs</td>
<td>Mandatory</td>
<td>Specify the time between two scheduled process runs.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Start Date</td>
<td>Mandatory</td>
<td>Specify the start date of the schedule.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>End Date</td>
<td>Mandatory</td>
<td>Specify the end date of the schedule.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Identify Duplicate Organization Person or Location Records**

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

**When to Use**

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

**Privileges Required**

Verify that you have the following privilege or roles:
- Application Implementation Consultant
- Master Data Management Application Administrator

**Before You Start**

Review the following before scheduling this scheduled process:
- This batch match scheduled process should be invoked by Duplicate Identification or import jobs

**Parameters**

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

**Import Bulk Customer Data**

You can use this scheduled process to import customer data. You can use the Data Import UI to check if the data was imported.
When to Use
This scheduled process is used to import customer accounts data into the application.

Privileges Required
Verify that you have the following privileges or role:

- Role:
  - Master Data Management Application Administrator
- Privileges:
  - ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY
  - ORA_MANAGE_TRADING_COMMUNITY_IMPORT_PROCESS_DUTY

Before You Start
Review the following before scheduling this scheduled process:

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

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch ID</td>
<td>Optional</td>
<td>Batch ID of the import flow.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Batch Name</td>
<td>Optional</td>
<td>Name of the batch</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Source System</td>
<td>Optional</td>
<td>Source System or Origination System of the batch data.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Batch Object</td>
<td>Optional</td>
<td>Import object of the Batch.</td>
<td>Any</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Maintain Party and Location Current Record Information

You can use this scheduled process to sync worker records in Human Capital Management (HCM) to person parties and to update the current profile record for people, organizations, and locations based on today's date. Syncing worker records to person party records helps in managing applications such as HR Help Desk, HCM Payroll, Expense, and so on. This scheduled process creates or updates person party records with party usage of HR_EMPLOYEE or HR_CONTINGENT_WORKER that are defined as workers in HCM such as pending worker, employee, contingent worker, nonworkers, and so on.

Prerequisites
This scheduled process syncs active workers only when the Enable Current Active Worker Sync For MPLCRI Job (ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER) profile option is set to yes (Y), and HRC_DISABLE_HCM_EVENTS_PROCESSING profile option is set to yes. When the HRC_DISABLE_HCM_EVENTS_PROCESSING profile option is set to yes, Change Person Details events aren't published. Therefore, both the profile options (ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER and HRC_DISABLE_HCM_EVENTS_PROCESSING) must be set to yes to avoid creating duplicate person parties while syncing active HCM worker records.

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

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

When to Use
This scheduled process is used to:

- De-normalize the future dated current location profile, party sites, and contact points based on today's date with extended support to future end-dated records.
- Create a party record for a Human Capital Management person record, if the party doesn’t exist.
- Synchronize the first name, middle name, the last name, the title of the person, work phone, and work email attributes of the person records.
- Support for the following HR person types:
  - Ex-Employee
  - Employee
  - Ex-Contingent Workers
  - Contingent Workers
  - Nonworkers
  - Pending Workers

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

- Application Implementation Consultant
- Master Data Management Application Administrator

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - When there is a requirement to create or update worker records as person parties to complete business flows such as setting up direct payment methods, then run this scheduled process.
  - The scheduled process can be run when HCM workers are created or updated from HCM interfaces like HDL loader and then to sync workers into person parties.

- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs, and subsequent instances remain in Wait status.
  - Ensure that you don’t schedule this process and the Synchronize Person Records process at the same time.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>None</th>
</tr>
</thead>
</table>
| Synchronization Type | Optional              | Specify the object to be synchronized. You can specify Worker (HR Persons) or Party and location (De-normalize Parties). If you don’t select anything, both objects are synchronized. | - Party and location  
- Worker       | Not applicable         | None                                                                       |
| Person Type          | Optional              | Specify the type of person records to be synchronized.                      | - Ex-Nonworker  
- Nonworker  
- Employee  
- Pending Worker  
- Ex-Employee  
- Ex-Pending Worker | Synchronization Type must be Worker. | None                    |
### Party Hierarchy Generation

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

#### When to Use

You must run this scheduled process in the following scenarios:

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

#### Privileges Required

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

- Roles:
  - ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
  - ORA_ZCH_MASTER_DATA_MANAGEMENT APPLICATION_ADMINISTRATOR_JOB

- Privileges:
  - ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY
Before You Start
Review the following before scheduling this scheduled process:

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

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hierarchy Type</td>
<td>Mandatory</td>
<td>Specifies the types of hierarchy.</td>
<td>Customer Hierarchy (default)</td>
<td>None</td>
<td>This parameter is List of Values driven. PARTY_HIERARCHY_TYPE</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Duns and Bradstreet Hierarchy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Partner Hierarchy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Trading Community Partner Hierarchy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hierarchy Name</td>
<td>Optional</td>
<td>Name of a hierarchy.</td>
<td>Any</td>
<td>None</td>
<td>Search and Select</td>
</tr>
<tr>
<td>Hierarchy Version</td>
<td>Optional</td>
<td>Version of the hierarchy.</td>
<td>Default: Active version</td>
<td>None</td>
<td>List of Values</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flattening Method</td>
<td>Mandatory</td>
<td>Method to be applied for flattening.</td>
<td>• Incremental Flattening (default)</td>
<td>None</td>
<td>List of Values</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Force Flattening</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Troubleshooting Information
Use this information to troubleshoot the scheduled process:

- You must monitor the status of scheduled process to know that it was successfully completed.
- If the scheduled process fails, it restarts from the beginning.
Purge Cleanse and Match Batch Data

This scheduled process purges all data quality batches.

When to Use

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

Privileges Required

Verify that you have the following privilege or role:

- Master Data Management Application Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
  - It’s recommended to run this scheduled process on need basis. This process is submitted internally after you select the list of batches to be deleted permanently using the UI. We don’t recommend that you schedule this process to run on regular intervals.

- Compatibility:
  - This scheduled process is self-incompatible. No two jobs can be run at the same time. The scheduled process goes into wait state if there is already one running.
  - We recommend that this scheduled process is run in off peak hours when there is very minimal activity.

Parameters

None.

Troubleshooting Information

Use this information to troubleshoot the scheduled process:

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

This scheduled process purges keys.

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

Privileges Required
Verify that you have the following privilege or role:

- Master Data Management Application Administrator

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency
  - It's recommended to run this scheduled process on need basis. This process is submitted internally after you select the list of batches to be deleted permanently using the UI. We don't recommended that you schedule this process to run on regular intervals.

- Compatibility:
  - This scheduled process is self-incompatible. No two jobs can be run at the same time. The scheduled process goes into wait state if there is already one running.
  - We recommend that this scheduled process is run in off peak hours when there are no new accounts or contacts getting created using import, fuse UI and so on.

Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

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

Purge Inactive Party Records

This scheduled process purges inactive data. This scheduled process reads the configuration information such as age of inactive record and filter criteria. It then purges parent and child records that meet the filter criteria.
When to Use

You can use this scheduled process to purge sales contact or sales account information that meet the specified filter criteria. There are no processes that must be run after running this process.

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

Privileges Required

Verify that you have the following privileges or role:

- Privilege
  - ORA_ZBS_SALES_ADMINISTRATOR_JOB
- Role
  - Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can run this scheduled process on need basis or schedule it for appropriate frequency, such as daily once.
- Execution Time
  - The execution time for a single data record is 1 to 2 minutes.
  - The execution time for a batch job or certain volume of data say 10k is around 1 hours 30 minutes to 2 hours.
- Compatibility
  - This scheduled process is incompatible with itself and any other scheduled process.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Parameter Values</th>
<th>Description</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Mandatory</td>
<td>Sales Contact</td>
<td>Purges inactive records that meet the filter criteria. For more information about specifying the filter criteria, see</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Account</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Oracle CX

**Understanding Scheduled Processes**

**Chapter 3**

**Sales and B2B Service Scheduled Processes**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Parameter Values</th>
<th>Description</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Execution Mode</td>
<td>Mandatory</td>
<td>Regular mode for party purge</td>
<td>Sales accounts and sales contacts may be referred in other applications. Examples of such references are identifier or name in applications like opportunities, leads, campaigns, territories, and so on. In Regular mode for party purge, the references of inactive party records based on the currently specified filter criteria are removed. In Exception mode for party purge clean up, the references of any party which no longer exists in addition to the references identified in the regular mode are removed.</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Troubleshooting Information**

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

**Related Topics**

- **Purge Inactive Data**

### Populate Location Latitude and Longitude Information

You can set up geocoding for countries to use in applications that use geography data. Geocoding finds the latitude and longitude coordinates from geographic data such as street addresses or Postal Codes. For example, on a mobile phone you can view which customer and contact addresses are close to your current location. The application integrates the geocoding with eLocation, which is a geocoding service provided by Oracle.
When to Use
You can use this scheduled process to populate latitude and longitude information for addresses in the HZ_LOCATIONS table.

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

Privileges Required
Verify that you have the following privilege or role:

- Role:
  - Application Implementation Consultant

- Privilege:
  - Run Geocode Loader

Before You Start
Review the following before scheduling this scheduled process:

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

- Compatibility:
  - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

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

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

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

**Troubleshooting Information**

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

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

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

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

Privileges Required
Verify that you have the following privilege or roles:
- Roles:
  - Application Implementation Consultant
  - Master Data Management Application Administrator
- Privilege:
  - Run Trading Community Resource Reporting Hierarchy Generation

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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tree Structure Code</td>
<td>Mandatory</td>
<td>Specifies the type of resource hierarchy.</td>
<td>RESOURCE_ORG_TREE, PARTNER_ORG_TREE</td>
<td>None</td>
<td>This parameter is List of Values driven.</td>
</tr>
<tr>
<td>Tree Code</td>
<td>Mandatory</td>
<td>Specifies the tree code.</td>
<td>GLOBAL_SALES_MARKETING</td>
<td>None</td>
<td>This parameter is List of Values driven. Select 'GLOBAL_SALES_MARKETING' for internal resource hierarchy. Select corresponding tree code for Partner Hierarchy.</td>
</tr>
<tr>
<td>Tree Version ID</td>
<td>Mandatory</td>
<td>Specifies the version ID of the Tree.</td>
<td>Any</td>
<td>None</td>
<td>This parameter is List of Values driven. Select corresponding Tree Version ID for the hierarchy that must be regenerated.</td>
</tr>
</tbody>
</table>

### Synchronize Financials Accounts and Contacts with CX Cloud

Customer accounts and contacts in Oracle Financials Cloud are an integral part of the billing process. Users create or import account and contact records in Financials Cloud. After they're in Financial Cloud, a synchronization process synchronizes the records to Oracle CX Cloud, thus making sales representatives aware of the details of sales accounts that exist in Financials Cloud. Without this synchronization, sales representatives may not know when their sales accounts become actual billing accounts.
When to Use
After users create customers in Financials Cloud, use a scheduled process to sync the records from Financials to CX Cloud.

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

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

Privileges Required
Verify that you have the following privileges or roles:

Role:
- Sales Administrator

Privileges:
- ZCM_CREATE_SALES_PARTY_CONTACT_PRIV
- ZCM_CREATE_SALES_ORGANIZATION_PRIV

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - You can execute or schedule this scheduled process when needed.

- Compatibility:
  - This scheduled process is self-incompatible. No two jobs can be run at the same time. The scheduled process goes into wait state if there is already one running.

Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

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

Related Topics
- Synchronize Financials Accounts

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

This scheduled process is used to:

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

Privileges Required

Verify that you have the following privileges or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator

Before You Start

Review the following before scheduling this scheduled process:

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

Parameters

None.

Validate Geographies of Addresses Against Master Geographies

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

When to Use

This scheduled process to validate address data against master geographies. This scheduled process verifies whether geography elements of an address like state, city, postal code, are valid as per master geography data. It also stores Geography Name Referencing information for the address.

You can run this scheduled process for the following reasons:

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

Verify that you have the following privilege or role:

- Role:
  - Application Implementation Consultant

- Privilege:
  - Run Trading Community Resource Reporting Hierarchy Generation

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Invoked whenever the geography naming references data for a location is generated or refreshed.

- Compatibility:
  - This scheduled process is self-incompatible and also incompatible with the Group Territory Geographies process.
  - If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until status until the first instance is completed.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Table Name</td>
<td>Mandatory</td>
<td>Specifies the location table.</td>
<td>HZ_LOCATIONS</td>
<td>None</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>PER_ADDRESSES_F</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run Type</td>
<td>Mandatory</td>
<td>Specifies the Run Type.</td>
<td>ALL</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>ERROR</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>NEW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usage Code</td>
<td>Optional</td>
<td>Specifies the validation usage code. This parameter specifies whether the geography validation or tax</td>
<td>GEOGRAPHY</td>
<td>None</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TAX</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parameter</td>
<td>Optional or Mandatory</td>
<td>Description</td>
<td>Parameter Values</td>
<td>Special Combinations Required</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------</td>
<td>-------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>validation must be run</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country Code</td>
<td>Optional</td>
<td>Specifies the ISO Country Code for which the process is run</td>
<td>Example: US</td>
<td>None</td>
<td>N/A</td>
</tr>
<tr>
<td>From Location ID</td>
<td>Optional</td>
<td>Specifies the beginning Location ID from which validation should be run</td>
<td>Numeric Value</td>
<td>From Location ID should be less than To Location ID</td>
<td>N/A</td>
</tr>
<tr>
<td>To Location ID</td>
<td>Optional</td>
<td>Specifies the ending Location ID till which validation should be run</td>
<td>Numeric Value</td>
<td>To Location ID should be greater than From Location ID</td>
<td>N/A</td>
</tr>
<tr>
<td>Start Date</td>
<td>Optional</td>
<td>Specifies the begin Location Effective Start Date</td>
<td>Date</td>
<td>Format : YYYY/MM/DD</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Example: 2019/12/24</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Start Date should be lower than End Date</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>Optional</td>
<td>Specifies the begin Location Effective End Date</td>
<td>Date</td>
<td>Format : YYYY/MM/DD</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Example: 2019/12/24</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>End Date should be higher than Start Date</td>
<td></td>
</tr>
</tbody>
</table>

**Forecasting**
Check Due Date

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

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

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

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

Privileges Required
Verify that you have the following privilege or role:

- Role
  - Sales Administrator
- Privilege
  - ZSF_DEFINE_SALES_FORECAST_PRIV
  - ZSF_MANAGE_SALES_FORECAST_PARTICIPANT_PRIV

Before You Start
Review the following before scheduling this scheduled process:

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

Parameters
None.

Troubleshooting Information

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

Forecast Autopilot

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

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

- **Check Due Date**: This short process archives forecasts that are now past their due dates and activates the next scheduled forecast. It runs once a day.
- **Refresh Forecast**: This process updates current and future forecasts using the latest opportunity data. It also updates the forecast territory hierarchy from the latest active territories. Between the territory freeze date and the forecast due date, the forecast territory hierarchy remains frozen. This process runs one day before the territory freeze date for each forecast period.
- **Refresh Revenue Metrics**: This process calculates the pipeline metric and closed revenue metric. It refreshes the pipeline metrics visible to the manager and runs every hour.
- **Compress Forecast Metrics**: This process reduces space usage and improves performance by compressing calculated metrics. It runs every hour.

When to Use

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

Privileges Required

Verify that you have the following privilege or role:

- **Role**
  - Sales Administrator

- **Privilege**
  - ZSF_DEFINE_SALES_FORECAST_PRIV
  - ZSF_MANAGE_SALES_FORECAST_PARTICIPANT_PRIV

Before You Start

Review the following before scheduling this scheduled process:

- **Recommended Frequency**:
  - When you enable forecasting, the Forecast Autopilot process is scheduled to run every hour.

- **Execution Time**:
  - Time varies based on the process being run.
• Compatibility:
  o Only one instance of the job must run at a time and there is no current functional need to be able to run multiple instances of this process at the same time.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Diagnostic Parameters      | Optional              | • To enable autopilot on an environment where it’s disabled or never enabled, one needs to submit autopilot with the following diagnostic parameter: setup_auto_pilot=ON  
  • If you want to disable the Forecast Autopilot process, then enter setup_auto_pilot=OFF. With Forecast Autopilot disabled, you must schedule each process. | setup_auto_pilot=ON, setup_auto_pilot=OFF            | None                          | N/A   |       |

Troubleshooting Information

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

Related Topics

• Forecast Processes
Refresh Forecast

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

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

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

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

Privileges Required
Verify that you have the following privilege or role:

- Role
  - Sales Administrator
- Privilege
  - ZSF_DEFINE_SALES_FORECAST_PRIV
  - ZSF_MANAGE_SALES_FORECAST_PARTICIPANT_PRIV

Before You Start
Review the following before scheduling this scheduled process:

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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Refresh Forecast Items Only     | Optional              | • Yes - Specifies whether to consider only the changed revenue items prior to the last refresh. Or all revenues items having effective date greater than start date of Un submitted forecast for synchronization  
• No or Empty - Default execution, which includes territory and product hierarchy synchronization in addition to revenue items. | Yes, No          |                               | None   |
| Diagnostic Parameters           | Optional              | Don't provide any value. This is used for diagnostic.                       | N/A              |                               | N/A    |

### Troubleshooting Information

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

### Related Topics

- Forecast Processes
Knowledge Management

Knowledge Article View Aggregation

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

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

When to Use

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

Privileges Required

Verify that you have the following privilege or role:

- Role
  - Knowledge Manager

- Privilege
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Once started, this process runs continuously and aggregates new data every hour. This process can be auto scheduled to run every hour.

- Execution Time:
  - Within one hour

- Compatibility:
  - This process depends on the Service process, Refresh Service Categories for Reporting, and on the Analytics process, Refresh Denormalized Time Dimension Table for BI. For more information about Refresh Service Categories for Reporting, see the Refresh Service Categories for Reporting topic in the Service Request Management. For more information about Refresh Denormalized Time Dimension Table for BI, see the Related Topics section.
  - You can’t run more than one instance of this scheduled process at the same time. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.
Parameters
None.

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

Related Topics
• Scheduled Processes for Analytics

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

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

Privileges Required
Verify that you have the following privilege or role:
• Role
  ◦ Knowledge Manager
• Privilege
  ◦ SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:
• Recommended Frequency
  ◦ Schedule the job to run once daily.
  ◦ You can schedule this job at any time of the day.
• Execution Time:
  ◦ The execution time depends on the number of changes made to categories and products since the previous execution.
• Compatibility:
  ◦ You can’t run this scheduled process while another instance of the scheduled process is running.
Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

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

Knowledge Search Aggregation
Use this scheduled process to aggregate data on the number of knowledge base searches that users have performed. This scheduled process takes data from action capture tables, moves them to analytics staging tables for processing, and writes them to analytics aggregate tables. The process updates the `cso_search_stats`, `so_rpt_questions`, and `cso_search_tokens` reporting tables with the aggregated data.

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

Privileges Required
Verify that you have the following privileges:

- SVC_SCHEDULESERVICE_JOBS_PRIV

Verify that you have the following roles:

- Knowledge Manager role

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - We recommend that you schedule this process to run automatically every hour by setting the frequency as hourly or minute, and the time between runs as one hour. Once started, this process runs continuously and aggregates new data every hour.

- Execution Time:
  - Within one hour

- Compatibility:
  - This process depends on the Service process, Refresh Service Categories for Reporting, and on the Analytics process, Refresh Denormalized Time Dimension Table for BI. For more information about Refresh Service Categories for Reporting, see the Refresh Service Categories for Reporting topic in the Service Request Management section. For more information about Refresh Denormalized Time Dimension Table for BI, see the Related Topics section.
You can't run more than one instance of this scheduled process at the same time. If you submit multiple instances, the first instance runs, and subsequent instances are blocked until it completes.

**Parameters**
None.

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

**Related Topics**
- Scheduled Processes for Analytics

---

## Knowledge Search Batch Process

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

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

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

**Privileges Required**
Verify that you have the following privilege or role:

- Role
  - Knowledge Manager
- Privilege
  - `SVC_SCHEDULE_SERVICE_JOBS_PRIV`

**Before You Start**
Review the following before scheduling this scheduled process:

- **Recommended Frequency:**
  - The job should be scheduled to run every fifteen minutes
  - We have no recommended time to schedule the process

- **Execution Time**
  - The execution time for single data record is 5 minutes
  - The execution time of the scheduled process depends on the amount of changed knowledge articles and the size of the product tree. The execution time ranges from 5 minutes to 2 hours.
• Compatibility:
  ◦ Knowledge Content Batch Process must be run before Knowledge Search Batch Process for product sync.
  ◦ There may be potential impact on the server performance while running this scheduled process.
  ◦ Running multiple instances of this scheduled process in parallel may create issues.

Parameters

None.

Troubleshooting Information

Use this information to troubleshoot the scheduled process.

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

Marketing Campaigns and Leads

Populate Lead Latitude and Longitude Information

Geocoding finds the latitude and longitude coordinates from geographic data such as street addresses or Postal Codes. For example, on a mobile phone you can view contact addresses are close to your current location. The application integrates the geocoding with eLocation, which is a geocoding service provided by Oracle.

When to Use

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

Privileges Required

Verify that you have the following privilege or role:

• Role:
  ◦ Application Implementation Consultant

Before You Start

Review the following before scheduling this scheduled process:

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

### Parameters

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

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

### Troubleshooting Information
- The log file contains the count of the number of locations that were picked for geocoding and other details of the scheduled process. Go to the scheduled processes UI and drill down on the job to click and open the log file.
Microsoft Office 365

Microsoft 365 Instant Sync

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

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

Privileges Required
Verify that you have the following privilege or role:
Role
- Sales Administrator

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

Parameters
None.

Troubleshooting Information
- Administrators will see in the Scheduled Process page if the sync process failed.
- If this sync process doesn’t complete successfully, you may not see your meetings and Emails from Outlook get synced into CX.
- Verification that the sync process ran successfully can be done by creating a meeting in Outlook and sharing that meeting to CX. An equivalent appointment in CX will be created after the instant sync process completes.

Related Topics
- Sync with Microsoft 365 for Sales
Microsoft 365 Standard Sync

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

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

Privileges Required
Verify that you have the following privilege or role:
Role
• Sales Administrator

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

Parameters
None.

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

Related Topics
• Sync with Microsoft 365 for Sales
Microsoft 365 Token Refresh

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

When to Use

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

Privileges Required

Verify that you have the following privilege or role:

- Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - As a starting point, set up the standard sync process to run every three hours.
  - The administrator can also run this process on need basis.

- Execution Time:
  - In most environments, this process should complete in less than an hour.

- Compatibility:
  - Ideally, you can set up the frequency of this sync process such that it has sufficient time to finish before another one starts. Monitor how long it takes to complete in your environment and adjust accordingly.

Parameters

None.

Troubleshooting Information

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

Related Topics

- Sync with Microsoft 365 for Sales

Microsoft Exchange Email Sync Job

Use the Microsoft Exchange Email Sync Job scheduled process to synchronize Microsoft Exchange emails to CX Sales.
When to Use
This scheduled process:
- Is used when Exchange Email Integration is enabled for Digital Sales.
- Is required to support Exchange email integration feature.
- Is required to run when the value of the profile option ORA_ZCA_DS_EMAIL_OPTIONS is set to MS Exchange with Redwood Compose UX, MSExchange Office365 UI, or MS Exchange with OS Native UI. The following are the profile values:
  - Oracle Email (default)
  - MS Exchange Office 365 UI
  - MS Exchange with Redwood Compose UX

Privileges Required
Verify that you have the following privileges:
- ORA_ZBS_SALES_ADMINISTRATOR_JOB
- ZOEDEFINEOUTLOOKINTEGRATION_PRIV

Verify that you have the following roles:
- Sales Administrator

Before You Start
Review the following before scheduling this scheduled process:

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

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

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

Parameters
None.

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

Partner Management

Partner Program Enrollment Expiration Job

Use the Partner Program Enrollment Expiration scheduled process to set the enrollment status to EXPIRED for all enrollments whose contract term has expired. This scheduled process sets enrollment status to expired when the enrollment status is APPROVED and the expiration date has passed the system date.

When to Use

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

Privileges Required

Verify that you have the following privileges:

- Privileges:
  - ZPM_MANAGE_PARTNER_PROGRAM_ENROLLMENT_PRIV
  - FUSION_APPS_CRM_SES_CRAWL_APPID
  - FUSION_APPS_CRM_SOA_APPID
  - ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
  - ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB
  - ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB
  - ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB
  - ORA_ZPM_CHANNEL_SALES_MANAGER_JOB

Before You Start

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

Parameters

None.

Troubleshooting Information

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

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

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

Privileges Required
Verify that you have the following privileges:

- Privileges
  - ZPM_CREATE_PARTNER_PRIV
  - ORA_ZPM_PARTNER_ACCOUNT_ADMINISTRATION_DUTY

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency
  - You can run this scheduled process when the partner dimensions are changed or not synchronized.

- Compatibility
  - This scheduled process isn't dependent on any other scheduled process.
  - There are no dependent scheduled process that must be taken into consideration before or after running this scheduled process.
  - This scheduled process doesn't impact the server performance.

Parameters
None.

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

Quota Management
Publish or Revise Hierarchy Quotas

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

When to Use

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

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

Privileges Required

Verify that you have the following privileges:

- Roles
  - Sales Administrator

- Privileges
  - Run Publish or Revise Hierarchy Quotas
    (ORA_MOT_QM_RUN_PUBLISH_REVISE_HIERARCHY_QUOTA_PRIV)

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

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Run this scheduled process on a need basis.

- Execution Time:
  - Time varies based on the number of territories being evaluated for publish or revise.
• Compatibility:
  o There should be only one instance of the job running at any one time.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Quota Plan</td>
<td>Mandatory</td>
<td>You can select Sales Quota Plan from drop down</td>
<td>Sales Quota Plan drop down displays only active and tracked sales quota plans.</td>
<td>None</td>
<td>This parameter is list of values driven.</td>
</tr>
<tr>
<td>Action</td>
<td>Mandatory</td>
<td>You can select publish or revise from the action drop down</td>
<td>The Action drop down displays these values</td>
<td>None</td>
<td>This parameter is list of values driven.</td>
</tr>
</tbody>
</table>
| Territory Number   | Mandatory             | You can specify the unique territory number.                     | Unique Territory Number                          | None                         | If Sales Quota Plan and Territory combination isn't found, the scheduled process displays this error  
  - The record <Sales Quota Plan>,<Territory Number does not exist. |

Troubleshooting Information

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

Related Topics

• How can I publish quotas for a territory hierarchy
Synchronize Quotas

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

Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Only if you update territories using a territory proposal are the territory hierarchies automatically synchronized with your active quota plan. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

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

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

There are two ways to synchronize:

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

Privileges Required
Verify that you have the following privileges:

- Role
  - Sales Administrator
- Privilege
  - MOT_QM_RUN_SALES_TERRITORY_QUOTA_SYNCHRONIZATION_JOB_PRIV

Before You Start
Review the following before scheduling this scheduled process:

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

 Parameters

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

 Troubleshooting Information

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

 Related Topics

• Schedule Quota Processes

 Quote Management

 Update Quotes Currency Conversion Rate

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

Quotes only support quote lines within a single currency. However, when we are reporting on different quote line items, we have to deal with different currencies. For example, a computer manufacturing company Vision Corp sells its computers across Europe and America. Its is headquartered in the US and the corporate currency is US Dollars (USD) for reporting purposes. Computers sold in United Kingdom are sold in British Pounds (GBP). We need a GBP to USD conversion rate on quote header. Similarly, computers are sold in Swiss Francs (CHF) in Switzerland. The quote will also be in CHF. We need a CHF to USD conversion rate on quote header. To understand the revenue expected, we need to use the corporate currency conversion stamped on the quote header and use that to convert the three quote line items and then aggregate. This scheduled process helps with this conversion.
When to Use
This scheduled process:
  • Runs reports on quote line items and gets results for quote lines that are in different currencies.
  • Supports currency conversion for quotes so that the right contract values are displayed for quote.
  • Isn’t run, quote contract values reporting is impacted.

Privileges Required
Verify that you have the following roles or privileges:
  • Roles:
    ○ Sales Administrator
  • Privileges:
    ○ ZCA_MANAGE_SALES_ORDER_JOB_SCHEDULER_PRIV

Before You Start
Review the following before scheduling this scheduled process:
  • Recommended Frequency:
    ○ Run this scheduled process on need basis.
  • Execution Time
    ○ Takes approximately 13 seconds to process 60,000 records.
  • Compatibility:
    ○ This scheduled process isn’t dependent on any other business processes.
    ○ You can’t run multiple instances of this process.

Parameters
None.

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

Create Company Information

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

When to Use

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

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

Privileges Required

Verify that you have the following privileges:

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

Before You Start

Review the following before scheduling this scheduled process:

- **Recommended Frequency:**
  - The job can be submitted only once in an environment.

- **Execution Time:**
  - The job takes less than 30 minutes to complete.

- **Compatibility:**
  - This job gets submitted only once in an environment as part of Setup Assistant.
Parameters

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

Troubleshooting Information

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

Related Topics

- Speed Up Your Initial Setup with Setup Assistant

Load and Update Oracle Fusion CRM Cloud Metrics

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

When to Use

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

Generate Sales Insight Facts

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

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

Privileges Required
Verify that you have the following privileges:
- ZCA_SALES_INSIGHTS_JOB_PRIV
- FUSION_APPS_CRM_ESS_APPID

Verify that you have the following roles:
- Sales Administrator

Before You Start
Review the following before scheduling this scheduled process:

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

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

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

Parameters
None.

Troubleshooting Information

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

Related Topics

- REST endpoint

Generate Sales Insight Facts Using Signals

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

When to Use

This scheduled process:

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

Privileges Required

Verify that you have the following privileges:

- ZCA_SALES_INSIGHTS_JOB_PRIV
- FUSION_APPS_CRM_ESS_APPID

Verify that you have the following roles:

- Sales Administrator
Before You Start
Review the following before scheduling this scheduled process:

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

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

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

Parameters
None.

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

Related Topics
- REST endpoint

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

When to Use
This scheduled process:
- Is part of the Sales Insights feature and is expected to run at least once in a week for the desired results.
- Doesn't depend on any other process.
- Is used to process the past data in the application for each insight and thereby generates the metrics for Sales Insights.
- Is used to generate the object level averages for Sales Insights. So, more the frequency of schedule, the higher is the accuracy.
Privileges Required
Verify that you have the following privileges:
- ZCA_SALES_INSIGHTS_JOB_PRIV
- FUSION_APPS_CRM_ESS_APPID

Verify that you have the following roles:
- Sales Administrator

Before You Start
Review the following before scheduling this scheduled process:

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

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

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

Parameters
None.

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

Related Topics
- REST endpoint

Purge Redundant Sales Insight Facts
Use the Purge Redundant Sales Insight Facts scheduled process to purge the redundant facts that became old or irrelevant for the Sales Insights.
When to Use
This scheduled process:
- Is part of the Sales Insights feature and is expected to run at least once in a month for the desired results.
- Have no dependencies with other processes.
- Helps to prevent unwanted facts piling up.

Privileges Required
Verify that you have the following privileges:
- ZCA_SALES_INSIGHTS_JOB_PRIV
- FUSION_APPS_CRM_ESS_APPID

Verify that you have the following roles:
- Sales Administrator

Before You Start
Review the following before scheduling this scheduled process:

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

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

Parameters
None.

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

Service Request Management

Aggregate Service Requests
Use the Aggregate Service Requests scheduled process to create Business Intelligence reports on service performance that provide an aggregated view as it relates to interactions, compliance, and knowledge article usage.

It runs an Extract, Transform, Load (ETL) job to aggregate both transactional service request data and interaction data to populate tables at the back end. Business Intelligence reports created using the CRM - CRM Service Request Summary and CRM - CRM Interaction Aggregate subject areas query the back end aggregate tables.
When to Use
The scheduled process must be run to use the CRM - CRM Service Request Summary and CRM - CRM Interaction Aggregate subject areas for creating Business Intelligence reports when needed. Ready-to-use reports dependent on these subject areas don’t show any data or show stale data unless this process is run.
For a list of ready-to-use reports dependent on these subject areas, refer to the reports list in the Related Topics section.

Privileges Required
Verify that you have the following privilege or roles:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA_SVC_HELPDESK_ADMINISTRATION
  - ORA_SVC_SR_ADMINISTRATOR
- To schedule the job the following privilege is required:
  - SVC_SCHEDULE SERVICE JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:

- The recommended frequency is hourly
- Execution Time:
  - The execution time for single data record is less than 1 minute.
  - The execution time for batch job on volume of 50K records is less than 5 minutes.
- Compatibility:
  - When run for the first time, the process will take significantly longer to execute, since all data in the relevant tables will be loaded.
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There should be only one instance of the job running at any one time, otherwise there will be issues.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the scheduled job doesn't run successfully, the next scheduled instance processes data from both jobs.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
• Check the Business Intelligence reports from the following subject areas to verify that this scheduled process is successful:
  o CRM - CRM Service Request Summary subject area with the following metrics and look for recent data:
    • Time
    • Facts > Service Request Summary Compliance Facts
    • Facts > Service Request Summary Interaction Facts
    • Facts > Service Request Summary Knowledge Article Facts
  o CRM - CRM Interaction Aggregate subject area with the following metrics and look for recent data:
    • Time
    • Facts > Interaction Aggregate Facts

Related Topics
• http://www.oracle.com/webfolder/technetwork/docs/reports/r13/Service-Reports-R13.xlsx

Execute Full Load of Cross-Channel Interaction Data for Reporting

Use the Execute Full Load of Cross-Channel Interaction Data for Reporting scheduled process to create business intelligence reports using the CRM - CRM Interaction Aggregate subject area.

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

When to Use
You must run this scheduled process in the following scenarios:
• This process must be executed when there are interactions crossing channels and agents. This is an on-demand scheduled process.
• Any time interaction data must be refreshed from a specific date.

Privileges Required
Verify that you have the following roles or privilege:
• To administer the job, one of the following roles are required with delete, execute, read and update:
  o ORA_SVC_HELPDESK_ADMINISTRATION
  o ORA_SVC_SR_ADMINISTRATOR
• To schedule the job, the following privilege is required
  o SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:
• Recommended Frequency:
  o You can run this scheduled process based on need
• Execution Time:
  o For single data record, less than 1 sec.
  o For batch job on volume of 10K records, less than 1 minute.

• Compatibility:
  o No other processes are triggered when this job runs.
  o No potential impact on the server performance while this job is running.
  o There should be only one instance of the job running at any one time, otherwise there will be issues.
  o There are no issues with business processes executing in parallel with this job.
  o This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

Parameters
You might need to specify some of the following parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Value</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>RefreshDate</td>
<td>Mandatory</td>
<td>Date from which data must be loaded or refreshed in the cross channel interaction table.</td>
<td>Date Values</td>
<td>None</td>
<td>This parameter is date which is List of Values driven.</td>
</tr>
</tbody>
</table>

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

• Notification of job completion would be using the standard scheduled process job notification system.
• If the scheduled job doesn't run successfully, you must run the job again manually.
• This scheduled process idempotent, and no cleanup activity is required if the job fails.
• To verify that this scheduled process is loaded with the correct data, use a business intelligence report from the CRM - CRM Interaction Aggregate subject area with the following metrics and check for recent data:
  o Time
  o Facts > Interaction Cross Channel Aggregate Facts.

Execute Full Load of HCM Person Mapping Data for Reporting
Use the Execute Full Load of HCM Person Mapping Data for Reporting scheduled process to create BI reports using the Help Desk - HR Service Requests Real Time subject area or Help Desk - Internal Service Requests Real Time subject area.
Fully loads HCM person mapping data for reporting using the Help Desk - HR Service Requests Real Time subject area and Help Desk - Internal Service Requests Real Time subject area. The goal of the process is to provide a consolidation of the assignment information per person (a person only one assignment). This process truncates SVC_BI_HCM_PERSON_REF_MAP table and perform a full load.

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

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

Privileges Required
Verify that you have the following privilege or roles:

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

- To schedule the job the following privilege is required:
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - Run this scheduled process on a need basis.

- Execution Time:
  - For single data record, less than 1 second.
  - For batch job on volume of 10K records, less than 1 minute.

- Compatibility:
  - No other processes are triggered when this scheduled process is run.
  - No potential impact on server performance while this job is running.
  - There should be only one instance of this job running at any one time to avoid any issues.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time

Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system
• If the scheduled job doesn’t run successfully, the next scheduled instance processes data from both jobs
• This scheduled process idempotent, and no cleanup activity is required, if the job fails
• To verify that this scheduled process is running successfully:
  ◦ create a BI report from the Help Desk - HR Service Requests Real Time subject area with the attributes with the following folders and search for recent data:
    • HR Service Request Contact> Contact Business Unit
    • HR Service Request Contact> Contact Organization
    • HR Service Request Contact> Contact Organization Hierarchy
  ◦ create a BI report from the Help Desk - Internal Service Requests Real Time subject area with the attributes with the following folders and search for recent data:
    • Internal Service Request Contact> Contact Business Unit
    • Internal Service Request Contact> Contact Organization
    • Internal Service Request Contact> Contact Organization Hierarchy

Execute Incremental Load of Cross-Channel Interaction Data for Reporting

Use the Execute Incremental Load of Cross-Channel Interaction Data for Reporting scheduled process to create Business Intelligence reports using the CRM - CRM Interaction Aggregate subject area.

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

When to Use
This process must be executed when there are interactions crossing channels and agents.

Privileges Required
Verify that you have the following privilege or roles:
• To administer the job, one of the following roles are required with delete, execute, read and update:
  ◦ ORA_SVC_HELPDESK_ADMINISTRATION
  ◦ ORA_SVC_SR_ADMINISTRATOR
• To schedule the job the following privilege is required:
  ◦ SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:
• The recommended frequency is hourly
• Execution Time:
  ◦ For single data record, less than 1 sec.
- For batch job on volume of 10K records, less than 1 minute.

  - Compatibility:
    - Before scheduling this job it's recommend that the job Execute Full Load of Cross-Channel Interaction Data for Reporting is run once to fully populate the data.
    - No other processes are triggered when this job runs.
    - No potential impact on the server performance while this job is running.
    - There are no issues with business processes executing in parallel with this job.
    - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

**Parameters**

None.

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If the scheduled job doesn't run successfully, the next scheduled instance processes data from both jobs.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- To verify that this scheduled process is running successfully, create a Business Intelligence report from the CRM - CRM Interaction Aggregate subject area with the following metrics and search for recent data:
  - Time
  - Facts > Interaction Cross Channel Aggregate Facts

**Execute Incremental Load of HCM Person Mapping Data for Reporting**

Use the 'Execute Incremental Load of HCM Person Mapping Data for Reporting' scheduled process to create BI reports using the 'Help Desk - HR Service Requests Real Time' subject area or 'Help Desk - Internal Service Requests Real Time' subject area.

Incrementally loads HCM person mapping data for reporting using the 'Help Desk - HR Service Requests Real Time' subject area and 'Help Desk - Internal Service Requests Real Time' subject area. The goal of the process is to provide a consolidation of the assignment information per person (a person has associated only one assignment).

**When to Use**

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

**Privileges Required**

Verify that you have the following privilege or roles:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA_SVC_HELPDESK_ADMINISTRATION
• ORA_SVC_SR_ADMINISTRATOR
  • To schedule the job the following privilege is required:
    • SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:

• Recommended Frequency:
  • The recommended frequency is daily.

• Execution Time:
  • For single data record, less than 1 second.
  • For batch job on volume of 10K records, less than 1 minute.

• Compatibility:
  • Before scheduling this job it’s recommend that the job Execute Full Load of HCM Person Mapping Data for Reporting is run once in order to fully populate the data.
  • No other processes are triggered when this scheduled process is run.
  • No potential impact on server performance while this job is running.
  • There should be only one instance of this job running at any one time to avoid any issues.
  • There are no issues with business processes executing in parallel with this job.
  • This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time

Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

• Notification of job completion would be using the standard scheduled process job notification system
• If the scheduled job doesn’t run successfully, the next scheduled instance processes data from both jobs
• This scheduled process idempotent, and no cleanup activity is required, if the job fails
• To verify that this scheduled process is running successfully:
  • create a BI report from the Help Desk - HR Service Requests Real Time subject area with the attributes with the following folders and search for recent data:
    • HR Service Request Contact> Contact Business Unit
    • HR Service Request Contact> Contact Organization
    • HR Service Request Contact> Contact Organization Hierarchy
  • create a BI report from the Help Desk - Internal Service Requests Real Time subject area with the attributes with the following folders and search for recent data:
    • Internal Service Request Contact> Contact Business Unit
    • Internal Service Request Contact> Contact Organization
Execute Incremental Load of SR Audit Data for Reporting

Use the Execute Incremental Load of SR Audit Data for Reporting scheduled process to create business intelligence reports using the Service - CRM Service Request Lifecycle subject area.

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

When to Use

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

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

Privileges Required

Verify that you have the following roles or privilege:

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

- To schedule the job, the following privilege is required
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start

Review the following before scheduling this scheduled process:

- The recommended frequency is hourly.
- Execution Time:
  - The execution time for single data record is less than 2 seconds.
  - The execution time for batch job on volume of 50K records is less than 1 minute.
- Compatibility
  - When run for the first time, the process will take significantly longer to execute, since all audit data for SRs created since the start of the previous month will be loaded. Before running the process for the first time, ensure that SR auditing is enabled. If no SR audit data is available, the process will exit without creating any data for the Service - CRM Service Request Lifecycle subject area.
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time, otherwise there will be issues. A built-in locking mechanism prevents a second instance of the job from being started before the current instance has finished.
There are no issues with business processes executing in parallel with this job.
- This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

**Parameters**

None.

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
- If no fact data is available in the Service - CRM Service Request Lifecycle subject area, but the scheduled process is running successfully, check to ensure the SR auditing is enabled.
- This scheduled process is idempotent, and no cleanup activity is required if the job fails.
- When the scheduled process starts it will attempt to obtain a process lock. If no other instance of the process is running, it will be successful. Upon successful completion or in the event the process fails gracefully, the lock will be released.
- If the scheduled process is unable to obtain a process lock, and no other instance of the process is running, the lock will automatically expire after 24 hours. To manually release the lock sooner, run the process Unlock Scheduled Process that Incrementally Loads SR Audit data.
- To verify that this scheduled process is loaded with the correct data, use a business intelligence report from the Service - CRM Service Request Lifecycle subject area with the following metrics and check for recent data:
  - Time
  - Facts > Service Request Lifecycle Facts.

**Fully Loads Action Plan Actions Data for Reporting**

Use the Fully Loads Action Plan Actions Data for Reporting scheduled process to create Business Intelligence reports using the Service - CRM Service Request Action Plans Real Time subject area.

The goal of the process is to provide a consolidation of the action owner from service requests and activity related records.

**When to Use**

This process must be executed when there are owners assigned or updated for service requests or for activities records. This is an on-demand job. You must run this job in the following scenarios:

- Any time action plan actions data must be fully refreshed

**Privileges Required**

Verify that you have the following privilege or roles:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA_SVC_HELPDESK_ADMINISTRATION
  - ORA_SVC_SR_ADMINISTRATOR
To schedule the job the following privilege is required:
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV

**Before You Start**

Review the following before scheduling this scheduled process:

- **Recommended Frequency:**
  - Based on need

- **Execution Time:**
  - For single data record, less than 1 second
  - For batch job on volume of 10K records, less than 1 minute

- **Compatibility:**
  - No other processes are triggered when this job runs
  - No potential impact on the server performance while this job is running
  - There should be only one instance of the job running at any one time, otherwise there will be issues
  - There are no issues with business processes executing in parallel with this job
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time

**Parameters**

None.

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system
- If the scheduled job doesn't run successfully, the next scheduled instance processes data from both jobs
- This scheduled process idempotent, and no cleanup activity is required if the job fails
- To verify that this scheduled process is running successfully, run a Business Intelligence report from the Service - CRM Service Request Action Plan Actions Real Time subject area with the following metrics and search for recent data:
  - Time
  - Facts > Service Request Action Plan Action Facts

**Incrementally Loads Action Plan Actions Data for Reporting**

Use the Incrementally Loads Action Plan Actions Data for Reporting scheduled process to create business intelligence reports using the Service - CRM Service Request Action Plans Real Time subject area.

The goal of the process is to provide a consolidation of the action owner from service requests and activity related records.
When to Use
This process must be executed when there are owners assigned or updated for service requests or for activities records.

Privileges Required
Verify that you have the following privilege or roles:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA_SVC_HELPDESK_ADMINISTRATION
  - ORA_SVC_SR_ADMINISTRATOR
- To schedule the job the following privilege is required:
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:

- The recommended frequency is hourly
- Execution Time:
  - For single data record, less than 1 second
  - For batch job on volume of 10K records, less than 1 minute
- Compatibility:
  - Before scheduling this job, it’s recommend that the job Fully Loads Action Plan Actions Data for Reporting is run once to fully populate the data
  - No other processes are triggered when this job runs
  - No potential impact on the server performance while this job is running
  - Only one instance of the job must be running at a time to avoid any potential issues
  - There are no issues with business processes executing in parallel with this job
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time

Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system
- If the scheduled job doesn’t run successfully, the next scheduled instance will process data from both jobs
- This scheduled process idempotent, and no cleanup activity is required if the job fails
- To verify that this scheduled process is running successfully, run a Business Intelligence report from the Service - CRM Service Request Action Plans Real Time subject area with the following metrics and search for recent data:
  - Time
Monitor Action Plan Actions

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

An agent can add one or more Action Plans to Oracle CX Sales and B2B Service objects and each Action Plan can have a list of actions to be performed by the agent or other Oracle CX Sales and B2B Service users.

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

**When to Use**

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

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

**Privileges Required**

Verify that you have the following privilege or role:

- Sales Administrator job role.

**Before You Start**

Review the following before scheduling this scheduled process:

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

**Parameters**

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

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

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process.

- On the Scheduled Processes page, the process status changes to Succeeded on completion of the job.
- If the scheduled process didn't run successfully, on the Scheduled Processes page, the process status changes to Error and the scheduled process restarts automatically. If the error status persists, an administrator should contact Oracle Support.
- This scheduled process can be restarted after a failure, but it's recommended that an administrator investigate the issue causing the failure.

**Monitor Service Request Milestones**

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

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

- raises a warning for milestones that have passed the warning threshold identified in the coverage, without being completed
- sets expiry of milestones that have passed the due date and time without being completed
**When to Use**
You can run this scheduled process when you're using service request milestones to track service level agreements and other commitments. If you don't schedule this process to run, service request milestones aren't in warning or expired states. The downstream processes that rely on these states may be impacted. An example of such downstream processes is workflow e-mail that you may have configured.

**Privileges Required**
Verify that you have the following roles or privileges:

- **Roles**
  - Application roles such as Service Request Administrator, HR Service Request Administration role

- **Privilege**
  - SVC_SCHEDULESERVICEJOBS_PRIV

**Before You Start**
Review the following before scheduling this scheduled process:

- **Recommended Frequency:**
  - It is recommended to schedule this process to run every 15 minutes, if business requirements permit. If business requirements dictate, the process can be scheduled for every 5 minutes depending on volume.

- **Execution Time:**
  - Less than 10 seconds for a single record
  - Less than 3 minutes for 10k records (open milestones)

- **Compatibility:**
  - No compatibility considerations or dependencies.

**Parameters**
None.

**Troubleshooting Information**
Use this information to troubleshoot the scheduled process.

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

Use the Purge Interactions scheduled process to purge the `svc_interactions`, `svc_interaction.refs`, and `svc_mca_interaction_summary` tables.

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

When to Use

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

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

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

Privileges Required

Verify that you have the following privileges:

- `FUSION_APPS_CRM_ESS_APPID`

Before You Start

Review the following before scheduling this scheduled process:

- **Recommended Frequency:**
  - The frequency is dictated by your data retention requirements.

- **Execution Time:**
  - This scheduled process should complete quickly. But the execution time is dependent on the amount of data being deleted.

- **Compatibility:**
  - This scheduled process doesn't affect the performance.

Parameters

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

Use this information to troubleshoot the scheduled process.

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

Purge Omnichannel Events

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

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

When to Use

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

Privileges Required

Verify that you have the following privilege or role:

- FUSION_APPS_CRM_ESS_APPID user

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - The frequency is dictated by your data retention requirements.
  - If you must retain only 30 days of data, you can run the job every day.

- Execution Time:
  - This job should complete fairly quickly. But the execution time is dependent on the amount of data being deleted.

- Compatibility:
  - This job doesn't affect the performance of the running system.

Parameters

There are no parameters to run this scheduled process. This process uses the svc_omni_events_retention_days profile option to control the size of the retention window.
Troubleshooting Information
Use this information to troubleshoot the scheduled process.

- If the job fails, the next run should pick up and delete any data older than the specified retention period.

Refresh SVC_BI_QUEUE_RESOURCES Table
Use the Refresh SVC_BI_QUEUE_RESOURCES table scheduled process to create business intelligence reports using the Service - CRM Service Queue Resources Real Time subject area.

It loads Business Intelligence queue resources data for reporting using the Service - CRM Service Queue Resources Real Time subject area. This process truncates SVC_BI_QUEUE_RESOURCES table and then perform a full load. Therefore, this process has two roles: fully load and incremental load.

When to Use
This process must be executed when there are queue resources and team members data. This is an on-demand job. You must run this job in the following scenarios:

- Any time Business Intelligence queue resource team data must be fully refreshed
- Any time when you want to make an incremental update of BI queue resource team data

Privileges Required
Verify that you have the following privilege or roles:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA_SVC_HELPDESK_ADMINISTRATION
  - ORA_SVC_SR_ADMINISTRATOR
- To schedule the job the following privilege is required:
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV

Before You Start
Review the following before scheduling this scheduled process:

- Recommended frequency:
  - On regular interval: hourly
  - Based on need
- Execution Time:
  - For single data record, less than 1 second
  - For batch job on volume of 10K records, less than 1 minute
- Compatibility:
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
Only one instance of the scheduled process can run at any one time to avoid any potential issues.

There are no issues with business processes executing in parallel with this job.

This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

Parameters
None.

Troubleshooting Information
Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification process.
- If the scheduled job doesn't run successfully, you must run the job again manually.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- To verify that this scheduled process has loaded the data successfully, run a Business Intelligence report from the Service - CRM Service Queue Resources Real Time subject area with the following metrics and search for the recent data:
  - Time
  - Facts

Refresh Service Categories for Reporting
Use the Refresh Service Categories for Reporting scheduled process to create new BI reports involving Service Request (SR) Category.

Generates the service category hierarchy and stores it in the SVC_CATEGORIES_CF table in a flattened form for easy reporting. Service category attributes in all service request subject areas obtain data from this table.

When to Use
This process must be executed for several Infolets and ready-to-use Business Intelligence reports to show data for SR Category. In addition, any report that uses the SR Category attribute either as a flat column or in a hierarchical fashion displays data for SR Category only after this scheduled process is run. Otherwise, SR Category is blank.

Privileges Required
Verify that you have the following privileges or roles:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA_SVC_HELPDESK_ADMINISTRATION
  - ORA_SVC_SR_ADMINISTRATOR
- To schedule the job the following privilege is required
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV
Before You Start

Review the following before scheduling this scheduled process:

- The recommended frequency is hourly.
- Execution Time:
  - For single data record, less than 1 second.
  - For batch job on volume of 1K records, less than 30 seconds. The relevant data comes from the table SVC_CATEGORIES, which doesn't usually have many rows.
- Compatibility:
  - There are no prerequisites to run this scheduled process.
  - No other processes are triggered when this scheduled process runs.
  - No potential impact on the server performance while this job is running.
  - Only one instance of the scheduled process must run at any one time to avoid any potential issues.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself, therefore only one instance of the job should be running at any particular time.

Parameters

None.

Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process notification system.
- If the scheduled job doesn't run successfully, the next scheduled instance will process all relevant data.
- This scheduled process idempotent, and no cleanup activity is required if the job fails.
- To verify this scheduled process is running successfully, perform a Business Intelligence report dimensional query on Service Category from any subject area that has the dimension. Commonly if the process hasn't run, the report returns no data. If a custom category was recently added, it may be present in the report if the process has run successfully recently. For example, in the Service CRM Service Requests Real Time subject area, select elements from the Service Category folder.

Service Request Queue Assignment

Use the Service Request Queue Assignment scheduled process to assign service requests to queues.

This scheduled process:

1. Finds unassigned service requests.
2. Executes queue assignment rules.
3. Assigns matching service requests to appropriate queue.

When to Use

Use this scheduled process to make sure every service request is assigned to a queue.
Privileges Required
Verify that you have the following privilege or roles:

- Roles
  - ORA_SVC_HELPDESK_ADMINISTRATOR
  - ORA_SVC_SR_ADMINISTRATOR

- Privilege
  - MOW_RUN_BATCH_ASSIGN_PROCESS_PRIV

Before You Start
Review the following before scheduling this scheduled process:

- Recommended Frequency:
  - On regular intervals, for example, hourly, daily or weekly depending on volume of service requests.

- Execution Time:
  - This scheduled process should run within seconds for a single service request, but could take few minutes or longer for multiple service requests depending on the number of unassigned service requests and number of queue assignments rules.

- Compatibility:
  - For this scheduled process to assign service requests to queues correctly, queue assignment rules must have been defined and published using the Manage Service Assignment Rules task.
  - This scheduled process modifies service request objects by populating the Queue field.
  - This scheduled process could be configured to work on Customer Relationship Management service requests or Human Capital Management service requests.
  - If you need a scheduled process to handle both Customer Relationship Management service requests and Human Capital Management Service Requests, you must configure two separate instances of this job with different parameters. Out of the two instances, one instance is for Customer Relationship Management service requests and another one is for Human Capital Management service requests. See the Parameters section.

Parameters
You can specify some of the following parameters for Customer Relationship Management Service Requests:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object_Code</td>
<td>Mandatory</td>
<td>Indicates business objects that get assigned to agents, such as</td>
<td>ORA_Service_Reque</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Parameter</td>
<td>Optional or Mandatory</td>
<td>Description</td>
<td>Parameter Values</td>
<td>Special Combinations Required</td>
<td>Notes</td>
</tr>
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<td>------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Candidate Object Code</td>
<td>Mandatory</td>
<td>Indicates objects that are the possible pool of assignment candidates, such as queues.</td>
<td>ORA_QUEUE_Candidate</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Assignment Mode</td>
<td>Mandatory</td>
<td>Indicates the type of assignment processing.</td>
<td>Matching</td>
<td>This value is driven by List of Values. Only Matching is supported.</td>
<td>None</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>Mandatory</td>
<td>Specify a view criteria name from the View Criteria table.</td>
<td>See the View Criteria table.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>View Criteria Bind Values</td>
<td>Mandatory</td>
<td>Specify the view criteria bind values of the associated view criteria name from the View Criteria table.</td>
<td>See the View Criteria table.</td>
<td>No spaces are allowed in the value.</td>
<td>None</td>
</tr>
<tr>
<td>Rule Category ID</td>
<td>Optional</td>
<td>Not applicable for this process. Indicates the type of rule-processing that must be performed. For example, matching, scoring or classification, and so on.</td>
<td>Must be blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Rule Category Name</td>
<td>Optional</td>
<td>Indicates the type of rule-processing that must be</td>
<td>Must be blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Parameter</td>
<td>Optional or Mandatory</td>
<td>Description</td>
<td>Parameter Values</td>
<td>Special Combinations Required</td>
<td>Notes</td>
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<tr>
<td></td>
<td></td>
<td>performed. For example, matching, scoring or classification, and so on.</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Grouping Attribute</td>
<td>Optional</td>
<td>Not applicable for this process.</td>
<td>Must be blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Replace Team</td>
<td>Optional</td>
<td>Not applicable for this process.</td>
<td>Must be blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Number of Work Objects per</td>
<td>Optional</td>
<td>Indicates number of records each sub job processes.</td>
<td>Default value is 1000.</td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>Sub Process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum Sub Process per</td>
<td>Optional</td>
<td>Indicates max number of sub jobs to be spawned for the given scheduled</td>
<td>Default value is 10.</td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>Process</td>
<td></td>
<td>process.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metrics Logging Interval</td>
<td>Optional</td>
<td>Indicates the number of work objects in a subprocess before logging</td>
<td>100</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>assignment metrics, such as update metrics after processing 100 service</td>
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<tr>
<td></td>
<td></td>
<td>requests. This is used if your object support Enterprise logging for</td>
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<td></td>
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<td>assignment.</td>
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</tr>
</tbody>
</table>
### Oracle CX: Understanding Scheduled Processes

#### Sales and B2B Service Scheduled Processes

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Data Parameters</td>
<td>Optional</td>
<td>Not applicable for this process.</td>
<td>Must be blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Optional</td>
<td>Indicates if the process must be run in diagnostic mode to view the details of assignment processing in an output log.</td>
<td>Not selected by default.</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

The following View Criteria table lists the view criteria name and their view criteria bind variable used to select Customer Relationship Management Service Requests compared to Human Capital Management Service Requests.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpenSRsUnassignedToQueueByStripeCd</td>
<td>Indicates the view criteria used to identify the service requests to be assigned.</td>
<td>BindStripeCd=ORA_SVC_CRM</td>
</tr>
<tr>
<td>OpenSRsUnassignedToQueueByStripeCdAndSRNumber</td>
<td>Indicates the view criteria used to debug by filtering by the Service Request Number. You must run the schedule process by turning on the diagnostic mode. As an Assignment Manager, you can take decisions regarding the service queue using the logs.</td>
<td>BindStripeCd=ORA_SVC_CRM,BindSrNumber=&lt;Service Request Number&gt; Note that you must specify the Service Request Number instead of &lt;Service Request Number&gt;.</td>
</tr>
</tbody>
</table>

You can specify some of the following parameters for Human Capital Management Service Requests:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object_Code</td>
<td>Mandatory</td>
<td>Indicates business objects that get assigned to agents, such as, service requests.</td>
<td>ORA_HCM_Service_I</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Parameter</td>
<td>Optional or Mandatory</td>
<td>Description</td>
<td>Parameter Values</td>
<td>Special Combinations Required</td>
<td>Notes</td>
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<td>-------------</td>
</tr>
<tr>
<td>Candidate Object Code</td>
<td>Mandatory</td>
<td>Indicates objects that are the possible pool of assignment candidates, such as queues.</td>
<td>ORA_HCM_Queue_Car</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Assignment Mode</td>
<td>Mandatory</td>
<td>Indicates the type of assignment processing. Matching is the only mode that is supported.</td>
<td>Matching</td>
<td>This value is driven by List of Values, but only one value, that is, Matching is supported.</td>
<td>None</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>Mandatory</td>
<td>Specify a view criteria name from the View Criteria table.</td>
<td>See the View Criteria table.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>View Criteria Bind Values</td>
<td>Mandatory</td>
<td>Specify the view criteria bind values of the associated view criteria name from the View Criteria table.</td>
<td>See the View Criteria table.</td>
<td>No spaces are allowed in the value.</td>
<td>None</td>
</tr>
<tr>
<td>Rule Category ID</td>
<td>Optional</td>
<td>Not applicable for this process. Indicates the type of rule-processing that is performed. For example, matching, scoring or classification, and so on.</td>
<td>Must be left blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Rule Category Name</td>
<td>Optional</td>
<td>Indicates the type of rule-processing that is performed. For example, matching,</td>
<td>Must be left blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Parameter</td>
<td>Optional or Mandatory</td>
<td>Description</td>
<td>Parameter Values</td>
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<td>-------</td>
</tr>
<tr>
<td>Grouping Attribute</td>
<td>Optional</td>
<td>Not applicable for this process.</td>
<td>Must be left blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Replace Team</td>
<td>Optional</td>
<td>Not applicable for this process.</td>
<td>Must be left blank.</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Number of Work Objects per Sub Process</td>
<td>Optional</td>
<td>Indicates number of records each sub job processes.</td>
<td>Default value is 1000.</td>
<td>This parameter along with Max Sub Processes per Process helps tune the performance of the scheduled process.</td>
<td>None</td>
</tr>
<tr>
<td>Maximum Sub Processes per Process</td>
<td>Optional</td>
<td>Indicates max number of sub jobs to be spawned for the given scheduled process.</td>
<td>Default value is 10.</td>
<td>This parameter along with Number of Work Objects per Sub Process helps tune the performance of the scheduled process.</td>
<td>None</td>
</tr>
<tr>
<td>Metrics Logging Interval</td>
<td>Optional</td>
<td>Indicates the number of work objects in a subprocess before logging assignment metrics, such as update metrics after processing 100 service requests. This is used if your object support Enterprise logging for assignment.</td>
<td>100</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Test Data Parameters</td>
<td>Optional</td>
<td>Not applicable for this process.</td>
<td>Must be left blank.</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
The following View Criteria table lists the view criteria name and their view criteria bind variable to select Customer Relationship Management Service Requests compared to Human Capital Management Service Requests.

<table>
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<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpenSRsUnassignedToQueueByStripeCd</td>
<td>Indicates the view criteria used to identify the service requests to be assigned.</td>
<td>BindStripeCd=ORA_SVC_HCM</td>
</tr>
<tr>
<td>OpenSRsUnassignedToQueueByStripeCdAndSRNumber</td>
<td>Indicates the view criteria used to debug by filtering by the Service Request Number. You must run the schedule process by turning on the diagnostic mode. As an Assignment Manager, you can take decisions regarding the service queue using the logs.</td>
<td>BindStripeCd=ORA_SVC_HCM, BindSrNumber=&lt;Service Request Number&gt;</td>
</tr>
</tbody>
</table>

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process.

- To submit the job, you must enter all the mandatory parameters and click Submit. The scheduled process’s main user interface page would show the process that was scheduled.
- The main job starts the sub processes depending on the number of records to process and waits until all sub process are completed.
- If a particular run for service request queue assignment job fails, next run should pick up unassigned service requests.

**Unlock Scheduled Process that Incrementally Loads SR Audit Data**

Use the Unlock Scheduled Process that Incrementally Loads SR Audit Data process to remove the process lock created by the Execute Incremental Load of SR Audit Data for Reporting scheduled process if there’s no instance of that scheduled process running, but you’re unable to start a new instance.
Removes the process lock created by the Execute Incremental Load of SR Audit Data for Reporting process when that process fails to remove its lock automatically.

**When to Use**

The process should only be run if the Execute Incremental Load of SR Audit Data for Reporting scheduled process is unable to start and no other instance of the process is currently running. Don't run it under any other circumstance.

Run this process only if the Execute Incremental Load of SR Audit Data for Reporting process is aborted (either manually or through some unexpected system event, such as a server stopped working) and doesn't get a chance to clean up before exiting.

**Privileges Required**

Verify that you have the following roles or privilege:

- To administer the job, one of the following roles are required with delete, execute, read and update:
  - ORA_SVC_HELPDESK_ADMINISTRATION
  - ORA_SVC_SR_ADMINISTRATOR
- To schedule the job, the following privilege is required:
  - SVC_SCHEDULE_SERVICE_JOBS_PRIV

**Before You Start**

Review the following before scheduling this on demand process:

- Don't run this process if the Execute Incremental Load of SR Audit Data for Reporting process is currently running.
- Execution Time:
  - The execution time is less than 2 seconds.
- Compatibility:
  - No other processes are triggered when this job runs.
  - No potential impact on the server performance while this job is running.
  - There can be only one instance of the job running at any one time.
  - There are no issues with business processes executing in parallel with this job.
  - This scheduled process is incompatible with itself; therefore, only one instance of the job should be running at any particular time.

**Parameters**

None.

**Troubleshooting Information**

Use this information to troubleshoot the scheduled process.

- Notification of job completion would be using the standard scheduled process job notification system.
• If the scheduled job doesn’t run successfully, it should be submitted again.
• This scheduled process is idempotent, and no cleanup activity is required if the job fails.
• To verify that this scheduled process has been successful, schedule the Execute Incremental Load of SR Audit Data for Reporting process and confirm it's successfully able to load data.

Territories

Delete Territory Proposal

Use the Delete Territory Proposal scheduled process to delete the draft territory proposals specified by the input parameter.

When to Use

This scheduled process:
• Deletes the draft territory proposals when you have many draft proposals containing large numbers of territories or coverage records that you don't plan to activate.

Privileges Required

Verify that you have the following privilege:
• MOT_VIEW_SALES_TERRITORY_PRIV

Verify that you have the following role:
• Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:
• You can run this scheduled process on a need basis.

Execution Time:
• Takes minutes to complete the scheduled process if the proposal contains 1000's of territories and coverage.

Compatibility:
• There are no scheduled processes that are dependent on this scheduled process.
• You can run multiple instances of this scheduled process in parallel.
Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Optional or Mandatory</th>
<th>Description</th>
<th>Parameter Values</th>
<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Number</td>
<td>Mandatory</td>
<td>Specify the proposal number to be deleted.</td>
<td>N/A</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

Troubleshooting Steps

- You can use the notification settings of the scheduled process to be notified when the process is complete.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.
- To verify that this scheduled process ran successfully, go to the Manage Proposals page under Territories.

Refresh and Promote Dimension Members

Use the Refresh and Promote Dimension Members scheduled process to refresh dimension members and promotes members to production. You can run this scheduled process whenever there are changes in source dimension members.

When to Use

This scheduled process:
- Refreshes dimension members and promotes members to production.
- Is run when there are changes in the source dimension members.

Privileges Required

Verify that you have the following privileges:
- MOT_RUN_TERRITORY_DIMENSION_SYNCHRONIZATION_JOB_PRIV

Verify that you have the following roles:
- Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:
- We recommend that you run this scheduled process on a weekly basis.

Execution Time:
- The execution time is around 60 minutes for 10 million territory coverage.
Compatibility:

- There's no known potential impact on the server performance while running this scheduled process.
- You can't run multiple instances of this scheduled process running in parallel.
- There are no business processes that can't be executed in parallel with this scheduled process execution.
- This scheduled process is incompatible with itself.

Parameters

None.

Troubleshooting Steps

- You can use the notification settings of the scheduled process to be notified when the process is complete.
- This scheduled process is idempotent, which means, this scheduled process can be restarted, if it failed in the initial run. No cleanup is required.

Refresh Territories from Resources

Use the Refresh Territories from Resources scheduled process to perform full or incremental synchronization of the resource hierarchy to a new or existing territory hierarchy. The resource-centric territory hierarchy is generated from your resource hierarchy when you enable forecasts using the quick setup. The Refresh Territories from Resources process synchronizes your territories periodically to match your latest resource hierarchy. The resources become the territory owners.

When to Use

This scheduled process:

- Is automatically scheduled to run before each forecasting window freeze when Enable Sales Forecasting is set to Yes in Setup Assistant.

Privileges Required

Verify that you have the following role:

- Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- We recommend that you run this scheduled process on a daily or weekly basis.

Execution Time:

- This scheduled process takes minutes to complete. The execution time depends on the number of resources and number of changes to the resource hierarchy.

Compatibility:

- Before you run Refresh Territories from Resources, you must have at least one dimension enabled using the Enable Dimensions and Metrics task and perform the Load and Activate action.
• There's no known potential impact on the server performance while running this scheduled process.
• You can't run multiple instances of this scheduled process running in parallel.
• There are no business processes that can't be executed in parallel with this scheduled process execution.
• This scheduled process is incompatible with itself.

Parameters

<table>
<thead>
<tr>
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<th>Description</th>
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<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diagnostic Parameters</td>
<td>Mandatory</td>
<td>Specify the diagnostic parameters.</td>
<td>N/A</td>
<td>None</td>
<td>See Enable Forecasts with Quick Setup topic in the Related Topics section, specifically the topic Remove Your Resource-Centric Territory Hierarchy for the example of using this diagnostic parameter.</td>
</tr>
</tbody>
</table>

Troubleshooting Steps

• You can use the notification settings of the scheduled process to be notified when the process is complete.
• This scheduled process is idempotent, which means, this scheduled process can be restarted, if it failed in the initial run. No cleanup is required.
• To verify that this scheduled process ran successfully, go to the Territories UI and view updates to resource-centric territories and the hierarchy.

Related Topics

• Enable Forecasts with Quick Setup

Update Inheritance Recipients

Use the Update Inheritance Recipients scheduled process to update the inherited dimension of recipient territories. Dimensions are attributes that define jurisdictional boundaries of territories. For example, you can use the geography dimension to define territories by country or postal code.

When to Use

This scheduled process:
• Updates the inherited dimensions of territories.
• Is used to update the recipient territories after you make changes to a source territory.
Privileges Required
Verify that you have the following privileges:
- Run Territory Inheritance Recipient Update Job (MOT_RUN_TERRITORY_INHERITANCE_RECIPIENT_UPDATE_JOB_PRIV)

Verify that you have the following roles:
- Sales Administrator

Before You Start
Review the following before scheduling this scheduled process:
Recommended Frequency:
- You can run this scheduled process on a need basis.
- We recommend that you run this scheduled process daily.

Execution Time:
- This scheduled process takes about 80 minutes for 500 territories having 500K coverage.

Compatibility:
- There's no known potential impact on the server performance while running this scheduled process.
- You can run multiple instances of this scheduled process in parallel.

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
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<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Territory</td>
<td>Optional</td>
<td>Select the recipient territory.</td>
<td>N/A</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Maximum number of Territories in Proposal</td>
<td>Mandatory</td>
<td>Specify the maximum number of territories.</td>
<td>Default value is 0.</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

Troubleshooting Information
- You can use the notification settings of the scheduled process to be notified when the process is complete.
- If the execution of this scheduled process isn’t successful, the inheritance recipient territories don’t get updated.
- This scheduled process is idempotent, which means, this scheduled process can be restarted, if it failed in the initial run. No cleanup is required.
- To verify that this scheduled process ran successfully, go to the Territories UI and view the updates in the recipient territory details.
User Context

Age User Context Relevancy Feed

Use the Age User Context Relevancy Feed scheduled process to purge user context data. This context data is found in smart lists for Accounts, Opportunities, Leads, Partners, and so on. As an administrator, you can reset user context data for all users in your organization.

You can also use this scheduled process to clear data for a specific set of users. You can run this scheduled process when needed and for a maximum of 10 users.

When to Use

This scheduled process:

- This scheduled process supports Smart list Saved Searches in Workspace, Infolets, Mobile, Digital Assistant, and Office 365.
- This scheduled process removes stale data in the User Context and hence in Smart Lists.
- You can specify the maximum number of days the data is relevant based on the creation date of the user relevancy feed using the Relevancy Aging Maximum Number of Days (ZCA_UC_AGING_CYCLE) profile option. The default value of this profile option is 30 days.

Privileges Required

Verify that you have the following roles:

- Sales Administrator
- Channel Administrator
- CRM Applications Administrator
- Partner Administrator

Before You Start

Review the following before scheduling this scheduled process:

Recommended Frequency:

- We recommend that you run this scheduled process once daily.

Execution Time:

- This scheduled process takes, typically, less than 30 seconds to process 25k records for a given user.
Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
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<th>Special Combinations Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>User List</td>
<td>Optional</td>
<td>Specify a list of users by separating the names with commas.</td>
<td>List of users</td>
<td>None</td>
<td>If you don’t provide a list of users, by default, this scheduled process ages the user context feed for all users.</td>
</tr>
</tbody>
</table>

Troubleshooting Steps

- As an administrator, you can set up your email for notification while setting up the scheduled process.
- If this scheduled process didn’t run successfully, errors are displayed and the sales administrator would have to take necessary action. You may have to contact Oracle Support.
- You can start the process again or spawn a new scheduled process.
- To verify that this scheduled process has been successful, go to Tools > Scheduled Processes and check active or completed scheduled processes.
Glossary

**global header**
The uppermost region in the user interface that remains the same no matter which page you're on.

**panel tab**
A tab that provides supplemental information or functionality for the page. Each panel tab is on the right side of the page, has an icon as the tab label, and slides out when you open the tab.

**process set**
A scheduled process that contains multiple individual processes or other process sets.

**scheduled process**
A program that you run to process data and, in some cases, generate output as a report.