Merge Approval Workflow

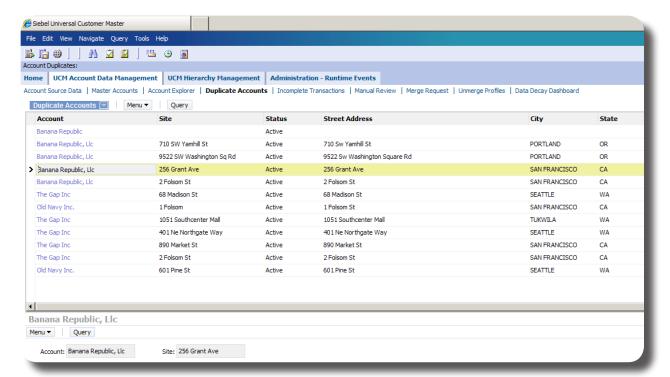An *Oracle* *"How To"* Paper 2012
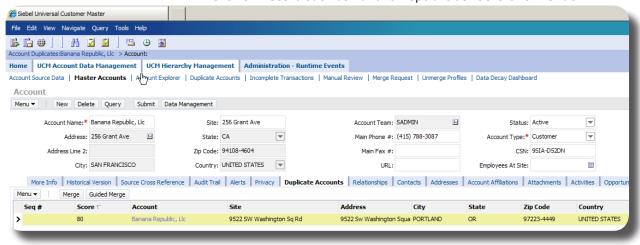
Presented By:

Douglas Forbes

William Indest

This document outlines an Simple Approval Demo flow and configuration for approving the merging of duplicate accounts using the out of the box screens and minor configuration which follows the demo flow.

Demo Flow

1. Login as USER: SSTEWARD   PASSWORD: Welcome1
2. Click on UCM Account Data Management Tab
3. Click on Duplicate Accounts

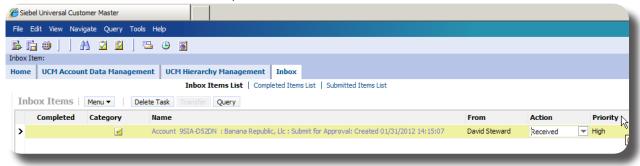4. Click on Record such as Banana Republic at 256 Grant Avenue

5. Modify the Status Field on the Account Record to "Submit for Approval"
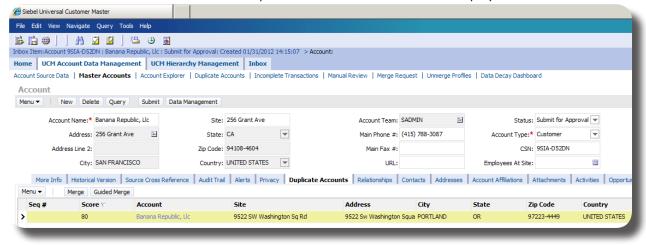6. Click the Submit button on the tool bar (this places this record in the Inbox of DSTEWARD)

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Merge Approval Workflow by Douglas Forbes and William Indest

7. Login as USER: DSTEWARD   PASSWORD: Welcome1
8. Scroll Down to the bottom of the home page.

My Inbox Items   — ×

Due	Type	Priority	Item
2/1/2012 06:00:00 F UCM Account		High	Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07
1/31/2012 09:45:37 Task			UCM Merge Account Task
2/1/2012 06:00:00 F UCM Account		High	Account 9SIA-D52GG : Old Navy Inc. : Submit for Approval: Created 01/31/2012 09:32:45

9. Drill Down on the "Submit for Approval" record in the "My Inbox Items"
10. In the Inbox Items List screen – Change the Action to received and step off the record.

Siebel Universal Customer Master

File   Edit   View   Navigate   Query   Tools   Help

Inbox Item:

| Home | UCM Account Data Management | UCM Hierarchy Management | **Inbox** |

Inbox Items List | Completed Items List | Submitted Items List

Inbox Items | Menu ▾ | Delete Task Transfer Query

Completed	Category	Name	From	Action	Priority
›	✔	Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07	David Steward	Received ▾	High

11. The Action field will now be drillable.
12. Click on the word "Received"
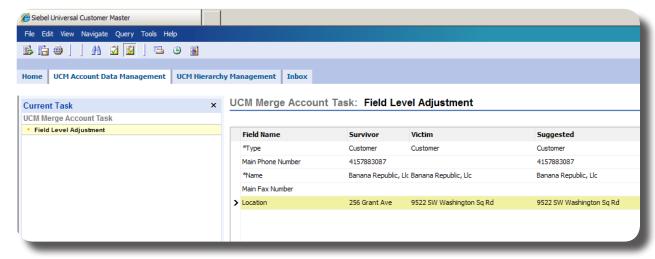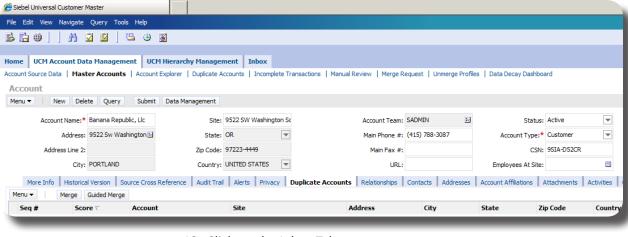13. The Duplicate Accounts Field should be displayed.

Siebel Universal Customer Master

File   Edit   View   Navigate   Query   Tools   Help

Inbox Item:Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07 > Account:

| Home | UCM Account Data Management | UCM Hierarchy Management | Inbox |

Account Source Data | **Master Accounts** | Account Explorer | Duplicate Accounts | Incomplete Transactions | Manual Review | Merge Request | Unmerge Profiles | Data Decay Dashboard

Account

Menu ▾   New   Delete   Query   Submit   Data Management

Account Name:* Banana Republic, Llc	Site: 256 Grant Ave	Account Team: SADMIN
Address: 256 Grant Ave	State: CA	Main Phone #: (415) 788-3087
Address Line 2:	Zip Code: 94108-4604	Main Fax #:
City: SAN FRANCISCO	Country: UNITED STATES	URL:

Status: Submit for Approval
Account Type:* Customer
CSN: 9SIA-D52DN
Employees At Site:

More Info | Historical Version | Source Cross Reference | Audit Trail | Alerts | Privacy | **Duplicate Accounts** | Relationships | Contacts | Addresses | Account Affiliations | Attachments | Activities | Opportu

Menu ▾   Merge   Guided Merge

Seq #	Score ▽	Account	Site	Address	City	State	Zip Code	Country
›	80	Banana Republic, Llc	9522 SW Washington Sq Rd	9522 Sw Washington Squa	PORTLAND	OR	97223-4449	UNITED STATES

14. Click on the Guided Merge

He gains everyone's approval who mixes the pleasant with the useful.
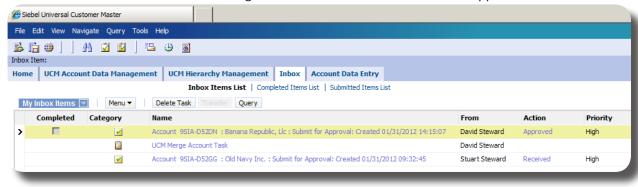
Quintus Horace
Roman Poet

Siebel Universal Customer Master

File Edit View Navigate Query Tools Help

Home | UCM Account Data Management | UCM Hierarchy Management | Inbox

Current Task   ✕

UCM Merge Account Task

• Field Level Adjustment

UCM Merge Account Task: Field Level Adjustment

Field Name	Survivor	Victim	Suggested
*Type	Customer	Customer	Customer
Main Phone Number	4157883087		4157883087
*Name	Banana Republic, Llc	Banana Republic, Llc	Banana Republic, Llc
Main Fax Number			
› Location	256 Grant Ave	9522 SW Washington Sq Rd	9522 SW Washington Sq Rd

15. Click Next
16. Click Submit
17. Show that the Status of the Account is Active.

Siebel Universal Customer Master

File Edit View Navigate Query Tools Help

Home | UCM Account Data Management | UCM Hierarchy Management | Inbox

Account Source Data | **Master Accounts** | Account Explorer | Duplicate Accounts | Incomplete Transactions | Manual Review | Merge Request | Unmerge Profiles | Data Decay Dashboard

Account

Menu ▾ | New | Delete | Query | Submit | Data Management

Account Name:* Banana Republic, Llc	Site: 9522 SW Washington Sq
Address: 9522 Sw Washington	State: OR
Address Line 2:	Zip Code: 97223-4449
City: PORTLAND	Country: UNITED STATES

Account Team: SADMIN	Status: Active
Main Phone #: (415) 788-3087	Account Type:* Customer
Main Fax #:	CSN: 9SIA-D52CR
URL:	Employees At Site:

More Info | Historical Version | Source Cross Reference | Audit Trail | Alerts | Privacy | **Duplicate Accounts** | Relationships | Contacts | Addresses | Account Affiliations | Attachments | Activities

Menu ▾ | Merge | Guided Merge

Seq #	Score	Account	Site	Address	City	State	Zip Code	Country

18. Click on the Inbox Tab
19. Change "Action" on the Account Record to Approved

Siebel Universal Customer Master

File Edit View Navigate Query Tools Help

Inbox Item:

Home | UCM Account Data Management | UCM Hierarchy Management | Inbox | Account Data Entry

Inbox Items List | Completed Items List | Submitted Items List

My Inbox Items ▾ | Menu ▾ | Delete Task | Transfer | Query

	Completed	Category	Name	From	Action	Priority
›	☐	☑	Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07	David Steward	Approved	High
		📋	UCM Merge Account Task	David Steward		
		☑	Account 9SIA-D52GG : Old Navy Inc. : Submit for Approval: Created 01/31/2012 09:32:45	Stuart Steward	Received	High

*A man cannot be comfortable
without his own approval.*

*Mark Twain
Author and Humorist*

Configuration for Approval Workflow:

The following configuration adds the value "Submit for Approval" to the drop down values for Account Status.

Add Value to LOV

1. Login to the Siebel Client as User: DSTEWARD   Password: Welcome1
2. Click on the Site Map (Globe)
3. Click on Administration – Data
4. Choose List of Values
5. Click on the Query Button
6. Enter ACCOUNT_STATUS in the type Field and click Go
7. Click on the New Button
8. Enter the Data in the following fields:
   Type: ACCOUNT_STATUS
   Display Value: Submit for Approval
   Language-Independent Code: Submit for Approval
   Order: 9
9. Step off the record.
10. Click the clear cache

Modify the Drill Down Object

This configuration adds the drill down from Inbox status field to the UCM Duplicate Accounts View.

1. Launch Windows Tier
2. Launch Siebel Tools
3. Query for the Applet – UInbox Item Task List Applet
4. Lock the Applet
5. Click on the Drill down Object Branch under the Applet
6. Right Click in the Drill Down Object Screen – Select New
7. Enter the Values into the new fields:
   Name: Action
   Hyperlink Field: Action
   View: UCM Account Duplicated Detail View
   Source Field: Item Object Id
   Business Component: Account
8. Step off the record
9. Compile the Applet

Modify the Workflow

This configuration adds the Values "Submit for Approval" to the branches of the workflow.

1. Open Siebel Tools
2. Open Workflow Process
3. Select the "UCM Account Inbox Approval Process" with the Status of Completed

4. Click the Revise Button on the Toolbar
5. Select the "UCM Account Inbox Approval Process" with the Status of In Progress
6. Right Click – Edit Workflow Process
7. In the Workflow Process Canvas click on the "Start" Line
8. In the Compose Condition Criteria Screen choose the Condition Line
9. Click the new button beside the Values window, Choose "Submit for Approval"
10. Click Ok
11. Click Update
12. Click Ok
13. Click on the connector with the label Inactive
14. Click the new button beside the Values window, Choose ""Submit for Approval""
15. Click Ok
16. Click Update
17. Click Ok
18. Click on the Publish Activate Icon
19. Login to the Siebel Client as User: DSTEWARD   Password: Welcome1
20. Click on the Site Map, Select Administration – Runtime Events, Then Click on Administration - Run Time Events
21. Click on Menu – Reload Runtime Events.

Configuration Complete. Time to Eat and Drink.

I'm on the patch right now. Where it releases small dosages of approval until I no longer crave it, and then I'm gonna rip it off.

Ellen DeGeneres
Comedienne

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