CRW020 Work with User

Overview Resources must be added to the Resource Masterfile. Resources can be internal or external and are used to complete work related to an issue or activity. These are the persons to whom the issues and tasks would be allocated to. The order can be placed by the resource through the order entry screen.

Purpose This panel allows you to:

Add a resource

Assign work to a resource

Change resource details

Replacement of a resource

Examples

This section illustrates examples concerning:

Example 1: Add a new resource

Example 2: Maintain resource details
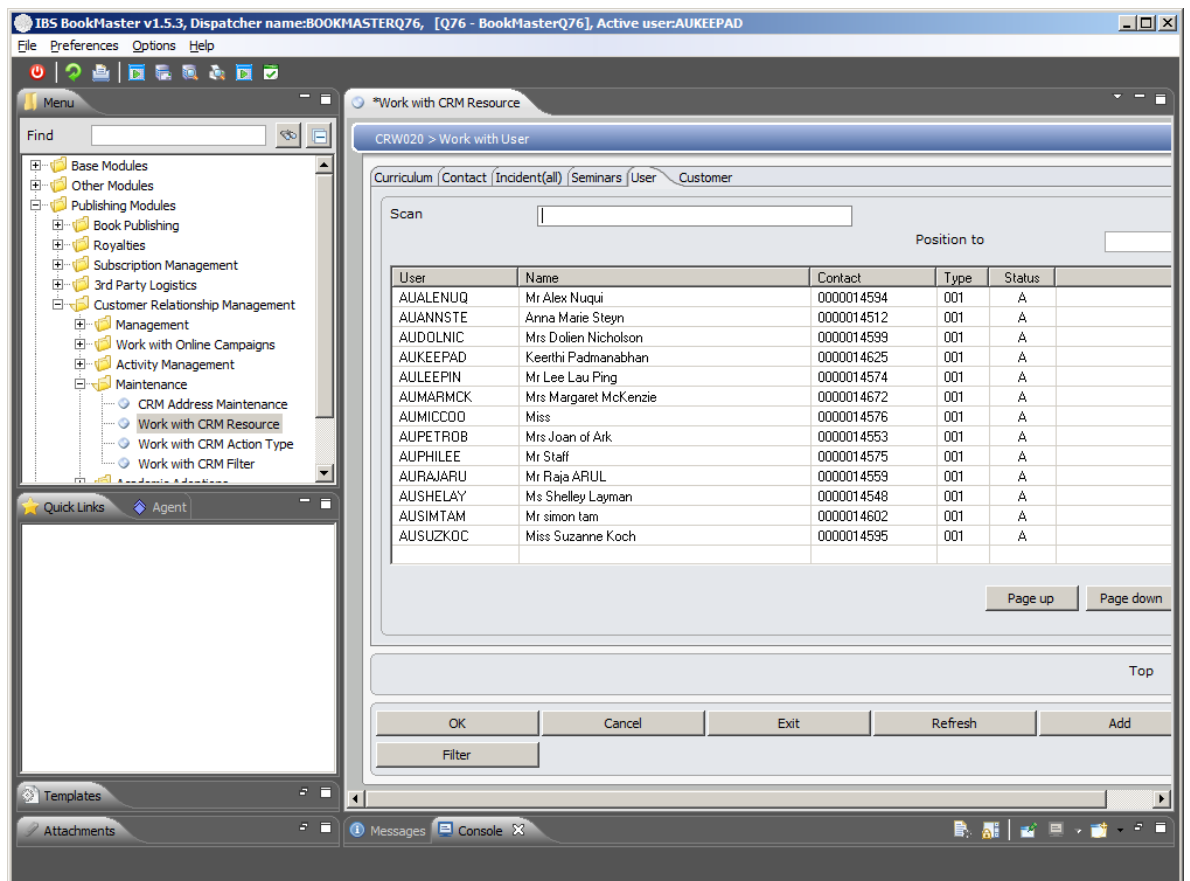
Example 3: Assign work to a resource

Example 4: Replace a resource

Example 1: Add a new resource

This example describes how to add a new resource.

1. Select option **Work with CRM Resource** from the Publishing Module>Customer Relationship Management>Maintenance menu.

CRW020 Work with User main panel is displayed.

Functions

Add	Access Work with Contact to create a new contact or add a new resource.
Filter	Allows selection of resources by user type and user status.

Tabs

Note: *Tab options are dependent on the user settings.*

Options

Resource detail	Access Work with Resource in change mode to maintain the resource definition.
Assignment	Access Work with Resource Access to view a list of assignments for the Resource. Assignments are those incidents the resource is working on in replace of another resource.
Replacement	Access Work with Resource in change mode for re-assignment of tasks to the resource.
Dsp resource	Access Work with Resource in display mode to show resource details.
Order Entry	Normal sales order via picking slip can be placed by the identified resource.

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Contact UDF	Access Contact extended information in change mode to maintain the additional information about the user.
Contact Key	Access Contact Match Key in change mode to match a duplicate contact key for a resource.
Account	Access Work with Contact Type in change mode to change the account type.
Seminars	Access work with seminar in change mode to maintain venue, date and description of the seminar for the selected user.
Contact	Access Work with Contact in change mode to maintain the contact details for the selected user.
Contact Attr	Access Work with Contact Attributes in change mode to maintain contact attributes for the selected user.
Contact Address	Access Contact Address to maintain or inquire on Contact address details.
Ext User	Access Work with External User in change mode to maintain external user details.
Contact Type	Access work with Contact Type in change mode to maintain contact type details.

2. Click **Add** function.

CRO055 Contact Creation panel for selecting a contact type for the new resource is displayed.
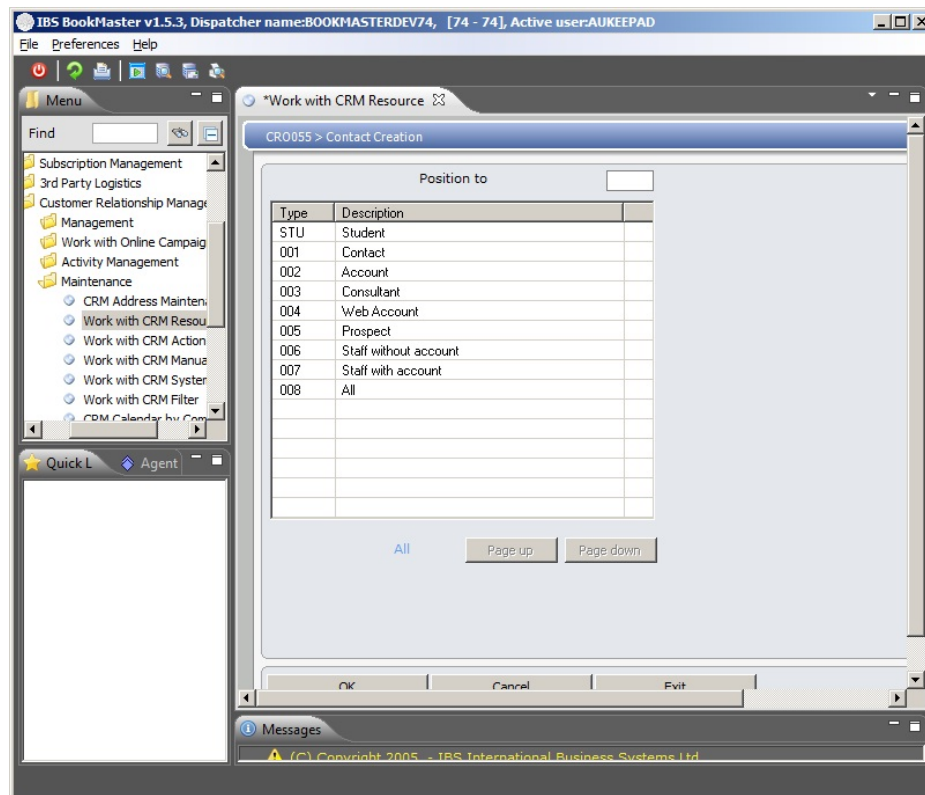
3. Select type of contact.

CRW055 Work with Contact main panel is displayed. Please refer to document CRW055 Work with Contact for further details.
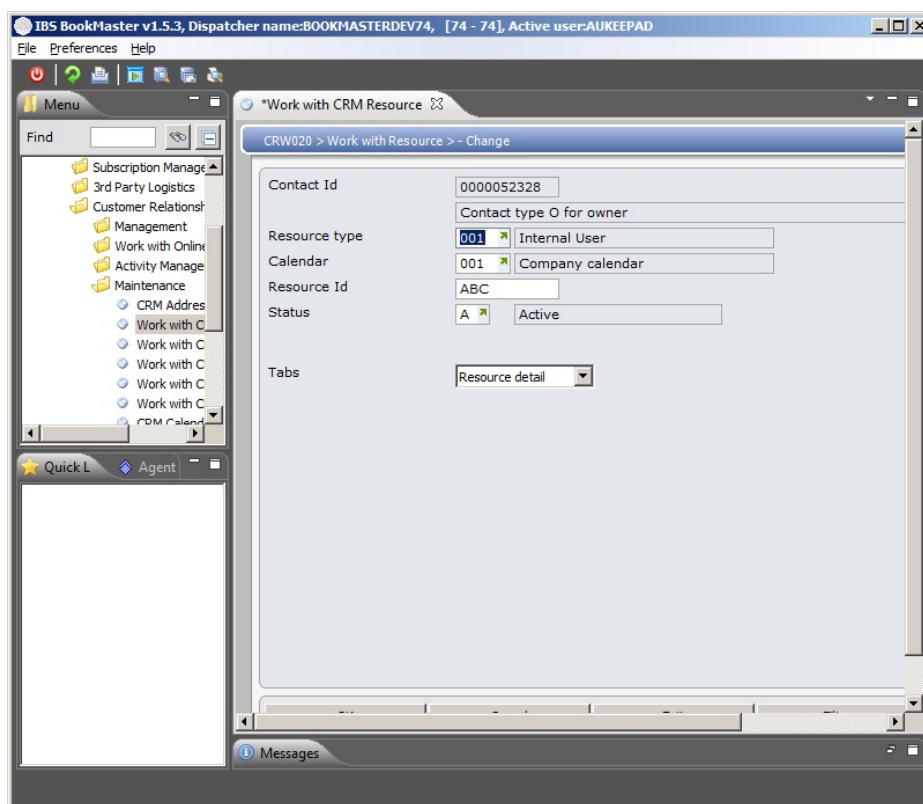
4. Key in all the fields on the panel **Work with Contact** and new contact is added.

Example 2: Maintain resource details

This example describes how to maintain resource details.

1. Repeat step 1 in Example 1: Add a new resource.

2. Select a user and click **Resource detail** option.

CRW020 Work with Resource -Change panel for maintaining resource details is displayed.

Relevant Fields

Contact ID   This ID is an identification given to the Contact being added to the Contact file

Resource type   This employee type determines whether the resource is a Internal user or External user. For internal users IBM Power Systems profile is required. The Employee type is retrieved from **TMSCRM/US-TYPE.**

Calendar   When adding a resource this is the calendar type used by the resource.

For example company calendar. The values are retrieved from **TMSCRM/CAL-A**

| Resource ID	The user or owner responsible for creating the resource. This must be a system user profile.
Status	When adding a resource this is the status of the resource.
	Allocate a user status which can either be Active, Closed, In-Progress or Stopped. The User status is retrieved from **TMSCRM/US-STS**.
	An Active status indicates that a user can gain access to the website using their ID and password. A Closed status indicates that the user is not permitted to access the website as their account status is closed. A Stopped status indicates that this user has been suspended from access to the web until further notice.

3. Click **OK** to confirm the changes made to the resource details.

Example 3: Assign work to a resource

This example describes how to assign work to a resource.

1. Repeat step **1** in .

2. Select a resource and click **Assignment** option.

CRW020 Work with Resource Access –Change panel is displayed.
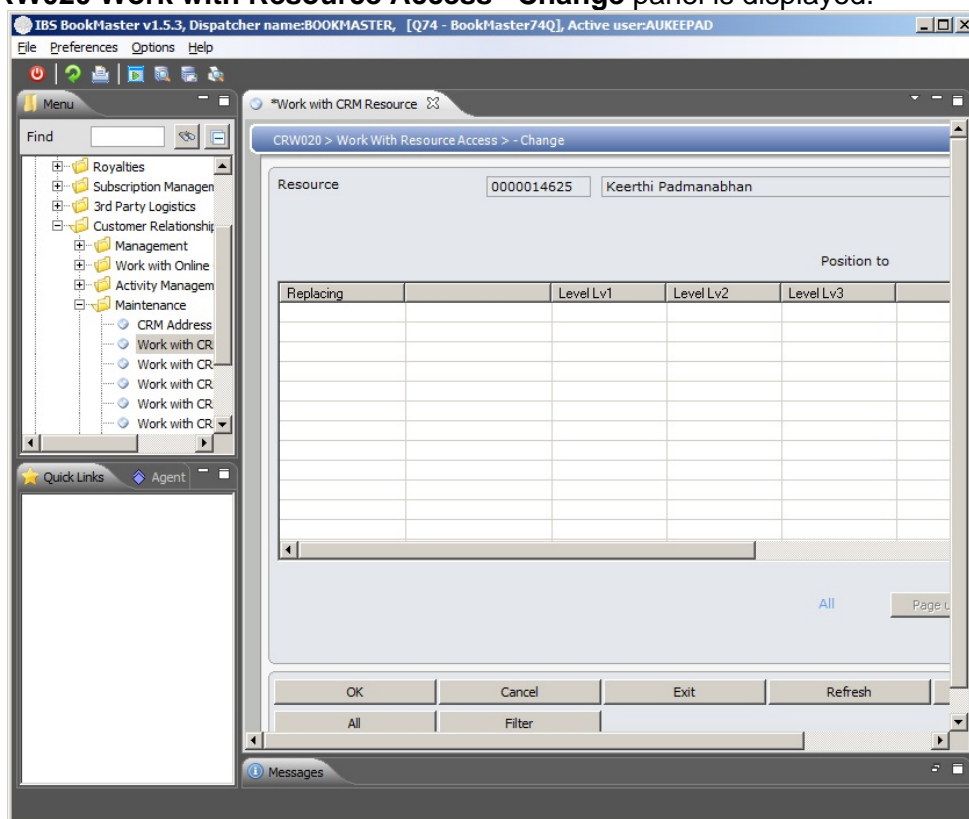
3. Click **Add** function to assign new work to the resource.

4. Click **OK** to confirm. Work is now assigned to replacement resource.

Example 4: Replace a resource

This example describes how to replace a resource.

1. The Replacement option is used to allocate resources to complete another Resource's work or inquire of another Resource's work. For example: when a Resource is on holidays, someone else can be allocated to work on the incidents/tasks allocated the resource. The incidents and activities allocated to the replacement resource will appear within the assignment option for the replacement resource.

2. Repeat step **1** as in Example 1: Add a new resource.

3. Select a resource and click **Replacement** option**.**

CRW020 Work with Resource Access panel to replace a resource is displayed.
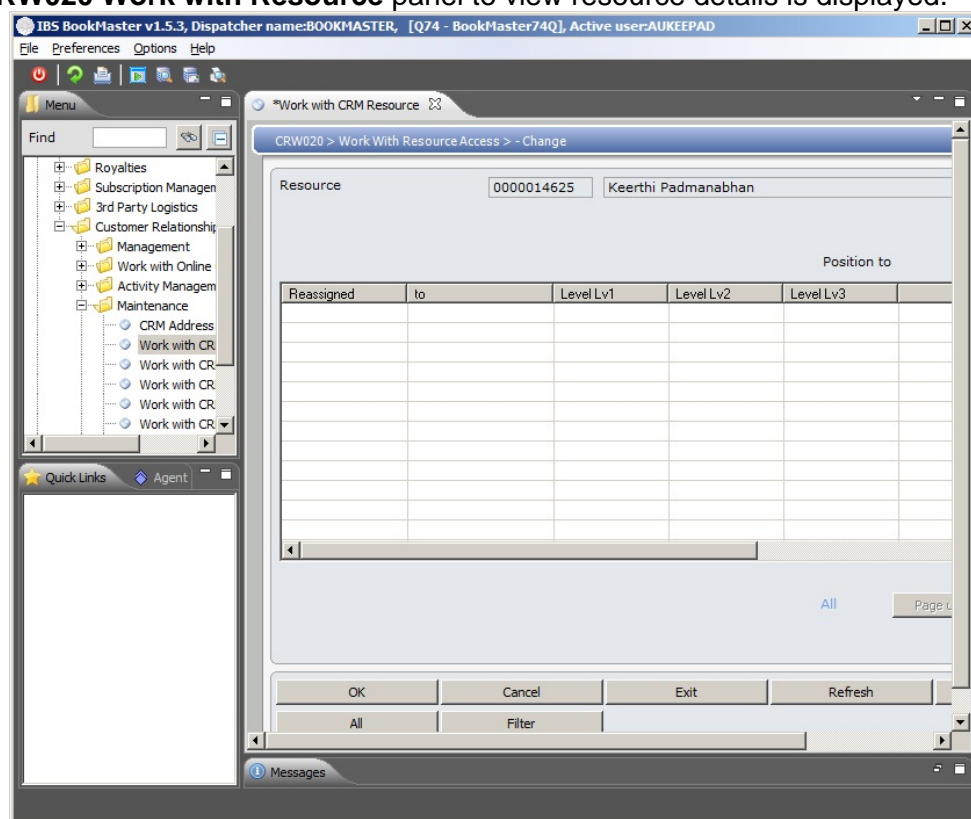
This program re-assigns work to the original resource.

Example 5: Display resource details

This example describes how to display resource details.

1. Repeat step **1** in Example 1: Add a new resource

2. Select a resource and click **Dsp resource** option.

CRW020 Work with Resource panel to view resource details is displayed.

Cross Reference

- CRW025A - Work with Calendar