

Best Practices for Deploying Workspace

Oracle CX Sales and B2B Service

Get the Workspace advantage! You can enable Workspace in CX Sales and B2B Service.

The Workspace page is designed so your users can search for and act on their CX Sales and B2B Service business objects on a single page.

The search on Workspace is super-fast and is powered by Oracle's Adaptive Search technology – a new advanced, intuitive search engine. You can also enable Adaptive Search on Global Search. However, you must specify which business objects your team can search for.

Oracle recommends that you deploy and transition to Workspace in phases:

Transition Phase I – Enable Workspace for Your Sales and Service Teams

- Enable the Workspace feature that is powered by Adaptive Search
- Enable the business objects to search for in Workspace
- Workspace coexists with and complements the old classic search available in CX Sales and B2B Service work areas

Transition Phase II – Enable Global Search to Use Faster Adaptive Search

- Enable Global Search to use Adaptive Search
- Faster search becomes available on all pages that use Global Search

Transition Phase III – Use New Adaptive Search Web Services

- Replace search-related classic REST web services with the new Adaptive Search web services for any third-party applications using CX Sales and B2B Service data.

Transition Phase IV – Disable Apps on Home Page

- For the business objects enabled for Workspace, remove the corresponding Apps from the CX Sales and B2B Service home page
- Workspace becomes the single point of access for CX Sales and B2B Service information



Target Audience

- Business Administrator
- Application Administrator
- Business Manager
- Project Manager
- Implementer

More Kit Components

- [Video](#)
- [Do You Know About Workspace](#)

Quick Links to Resources

- [Implementation & Management Series](#)
- [Verify Certification Badges](#)
- [Recommended Training for Customers](#)
- [Best Practices Resource Centers](#)
- [My Oracle Support \(MOS\)](#)
- [Oracle Help Center](#)

Other Helpful Links

- [System Requirements](#)
- [Oracle University](#)
- [Oracle Partner Finder](#)

Connect with us

- [Cloud Customer Connect for Sales](#)

SETTING UP WORKSPACE

Before you set up Workspace:

- Analyze and make note of the business objects that your CX Sales and B2B Service teams use most often. Start with enabling Workspace for these business objects. You can add more business objects later.
- Make note of custom job roles with custom data security predicates as they are not supported for Workspace. Replace the custom data security predicates with the predefined security predicates or use Access Groups. For more information, see the [Securing CX Sales and B2B Service](#) guide.

Setting up Workspace:

- Enable Workspace in the Setup and Maintenance work area.
- Configure the business objects and the object attributes your users can search for.
- Define Saved Searches either for all users or for specific user roles.
- Optionally, enable Adaptive Search for Global Search in the Setup and Maintenance work area. Do this if you use Global Search and want it to perform faster and be consistent with Workspace.
- Optionally, enable Dynamic tabs to view related records in nested tabs. For B2B Service users, dynamic tabs are enabled by default for the Customer Service Representative and Customer Service Manager job roles. For Sales users, you must grant them a custom role assigned with the following three privileges:
 - Open Objects in Dynamic Tabs
 - Open Objects in Dynamic Tabs for FSCM
 - Open Objects in Dynamic Tabs for HCM

For information about assigning privileges, see the [Securing CX Sales and B2B Service](#) guide.

For more information about setting up Workspace, see the [Workspace](#) chapter in the Implementing Sales guide. Please contact Oracle Support if you require technical assistance.

RESOURCES

- [Workspace](#) chapter in the Implementing Sales guide
- [Workspace](#) chapter in the Using Sales guide

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