

# Oracle® Applications

Supplemental CRM Installation Steps

Release 11*i*

November 2000

Part No. A86291-02

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## **Oracle Applications Supplemental CRM Installation Steps, Release 11*i***

**Part No. A86291-02**

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If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

*Supplemental CRM Installation Steps* provides instructions for completing your installation of Oracle Customer Relationship Management (CRM) products. In this release of Oracle CRM, much of the installation process is handled using the Oracle Rapid Install product, which automates many of the required steps and minimizes the time it takes to implement Oracle CRM Applications and the Oracle8i Server technology stack.

If you are responsible for implementing Oracle CRM Applications, it is important that you read and understand the information in *Oracle Applications Concepts* as well as the information in this guide. *Oracle Applications Concepts* explains the technology, architecture, and terminology used in this document.

## Intended Audience

This document contains tasks to be performed by the following IT professionals:

### **Database Administrator**

Installs and configures the Oracle database and maintains database access controls. This person provides consultation on performance and is responsible for monitoring growth and fragmentation of the production database and ensuring database backup and recovery.

### **System Administrator**

Responsible for administering the development system. This person's responsibilities include:

- Ensuring that hardware is correctly configured
- Installing, configuring, and maintaining operating and development software

- Ensuring that the system is backed up daily
- Designing and maintaining system security, for example establishing system accounts

System administrators provide first-line support for problems with the development system and ensure that faults are quickly rectified. They may perform the setup and initial maintenance of the production system or advise the client's operational staff on these tasks. The system administrator works with the project team to optimize system performance, install packaged applications environments, and convert data.

### **Technical Specialist**

Responsible for designing, developing, unit testing, implementing, and maintaining the custom extensions for Oracle CRM Applications. These extensions include, but are not limited to, modules such as interfaces, automated data conversions, reports, forms, and enhancements.

## **Related Documents**

The following manuals on the Oracle Applications, Release 11*i* Documentation CD-ROM are referenced in this document:

- *Oracle Applications Concepts*
- *Installing Oracle Applications, Release 11i*
- *Oracle Call Center Applications Setup*
- *Oracle CRL Financials Implementation Guide*
- *Oracle CRL-Financials Enabled Projects Concepts and Procedures*
- *Oracle Mobile Device Gateway Concepts and Procedures*

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# CRM Applications Supplementary Installation Tasks

This chapter provides instructions for completing your installation of Oracle CRM applications. Perform the supplementary steps described here **after** the general installation procedures described in *Installing Oracle Applications, Release 11i*.

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**Note:** The Oracle CRM applications not listed in this manual do not require additional installation tasks.

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This manual details the supplementary installation tasks for the following Oracle CRM applications:

Product Family	Application(s)
CRM Tools and Technology	<ul style="list-style-type: none"><li>■ <a href="#">HTML Stack</a></li><li>■ <a href="#">Common MES</a></li></ul>
Internet Business Applications	<ul style="list-style-type: none"><li>■ <a href="#">Oracle iSupport</a></li><li>■ <a href="#">Oracle iPayment</a></li><li>■ <a href="#">Oracle eMail Center</a></li></ul>
Marketing Applications	<ul style="list-style-type: none"><li>■ <a href="#">Oracle Marketing Encyclopedia System</a></li></ul>
Call Center Applications	<ul style="list-style-type: none"><li>■ <a href="#">Oracle Telephony Manager</a></li><li>■ <a href="#">Oracle Scripting</a></li></ul>
Communications and Utilities Applications	<ul style="list-style-type: none"><li>■ <a href="#">Oracle Network Logistics - NATS</a></li><li>■ <a href="#">Oracle SDP Provisioning</a></li><li>■ <a href="#">Oracle CRL Financials</a></li></ul>

## CRM Tools and Technology

This section includes the supplemental installation tasks for the following Oracle CRM Foundation components:

- [HTML Stack](#)
- [Common MES](#)

### HTML Stack

#### Supplemental Installation Steps

1. If your Apache server is running on a UNIX platform, then set the file handle limit before restarting the Apache server . Depending on the UNIX shell you are running, the command will be a variation of the `ulimit` or `limit` command:
  - a. At the command line, verify the limit for descriptors (for example, `ulimit -n` or `limit`).
  - b. Set the limit for descriptors to 1024 (for example, `ulimit -S -n 1024` or `limit descriptors 1024`).
  - c. Verify your changes.
2. Run the "Generate Territory Packages" concurrent program for all Usage/Transaction Type combinations that are currently used on the instance. This needs to be done for the Territory Assignments to operate correctly.

To run the concurrent program, perform the following steps:

- a. Log on to Oracle Applications and select the "CRM Administrator" responsibility.
- b. Select **Requests** from the Function Navigator screen. It is under the same menu structure as "Territory Management."
- c. Select **Run**. The Submit Request form for the Concurrent Manager appears.
- d. From the LOV select **Generate Territory Packages**. The parameter form appears.
- e. Select the following from the LOVs:
  - \* **Usage**: Select the appropriate usage, for example, Oracle Service
  - \* **Qualifier Type**: Select the appropriate transaction type, for example, Service Request and Task

- \* **Record Number:** Leave at default, 10
  - \* **Debug:** Yes
  - \* **Trace:** Yes
- f. Click **OK**.
  - g. Click **Submit**.
3. Clean the Apache server cache and stop and start the Apache listener. It is also advisable to bounce any other middle tier components like WebDB listeners, TCF server and Forms listener.
  4. If the iSupport application is installed in your environment, it is recommended that you apply patch number 1475518.

## Common MES

Using Oracle CRM Foundation requires recreating indexes on URL\_STRING column in JTF\_AMV\_ITEMS\_B table to add the proxy settings information specific to the user site. Run jtfiimt. using SQL\*Plus for each JTF schema, passing the following parameters.

- JTF username
- JTF password
- site proxy server
- comma-delimited list of domain names where proxy does not have to be used

Use the following syntax:

For UNIX Users:

```
$ cd $ JTF_TOP/patch/115/sql/
$ sqlplus <username>/<JTF password> @jtfiimt.sql <JTF username> <JTF password>
<proxy server> '<list of sites not requiring proxy>'
```

For NT Users:

```
C:\> cd %JTF_TOP%\patch\115\sql
C:\> sqlplus <JTF username>/<JTF password> @jtfiimt.sql <JTF username> <JTF
password> <proxy server> '<list of sites not requiring proxy>'
```

Example:

```
sqlplus JTF/JTF @jtfiimt.sql JTF JTF 'proxy-server.fooaaa.com' 'foobar.com,
```

```
us.foobar.com'
```

Once the above script is successfully run the proxy setting preferences are created. The user now needs to call the script `jtfaibu.sql` using SQL\*Plus for each JTF schema. This script drops and recreates indexes on `URL_STRING` column in `JTF_AMV_ITEMS_B` table, passing the following parameters:

- JTF username
- JTF password

Use the following syntax:

For UNIX Users:

```
$ cd $ JTF_TOP/patch/115/sql/  
$ sqlplus <username>/<JTF password> @jtfaibu.sql <JTF username> <JTF password>
```

For NT Users:

```
C:\> cd %JTF_TOP%\patch\115\sql  
5. C:\> sqlplus <JTF username>/<JTF password> @jtfaibu.sql <JTF username> <JTF password>
```

## Internet Business Applications

This section includes the supplemental installation tasks for the following Oracle CRM applications:

- [Oracle iSupport](#)
- [Oracle iPayment](#)
- [Oracle eMail Center](#)

### Oracle iSupport

#### Supplemental Installation Steps

To enable survey/feedback, the merchant must set up the survey configuration in iSupport System Administration. The merchant must construct the survey/feedback through the Scripting Author in Oracle Scripting. Please refer to *Oracle Scripting Concepts and Procedures* for details.

The iSupport product uses Oracle Scripting to run the survey, so the merchant must set up the system configuration for the Scripting module.

The system configuration includes:

- The server name on which the Scripting engine resides
- The port number
- The database name on which the scripts are stored
- Java Native Directory Interface
- Username
- Password

Refer to *Oracle Call Center Applications Setup* on the Oracle Call Center Applications Setup CD-ROM for Oracle Scripting installation documentation.

## Oracle iPayment

### Installing and Configuring iPayment Java Servlets

Oracle iPayment has several Java servlets which are not configured as part of Oracle Applications Rapid Install process. Follow the step-by-step instructions in this section to configure these servlets.

The instructions in this section assume you have some knowledge of configuring Java servlets with Apache Web Server. In particular, the instructions assume you know where to find Apache and JServ configuration files on the node where the Apache Web Server is installed. For further information, refer to the Apache documentation available at [www.apache.org](http://www.apache.org).

#### 1. Login to the Web Server node.

Log on to your Web Server node as the `applmgr` user and run the environment file to set up the Oracle Applications environment. Your environment should have the following variables defined:

```
$AU_TOP, $FND_TOP, $IBY_TOP
```

`$AU_TOP` is the Applications utilities top-level directory, which contains common applications files.

\$FND\_TOP refers to the top-level directory where foundation services are located (foundation service is a group of basic facilities common across many products).

\$IBY\_TOP refers to the top-level directory of Oracle iPayment installation.

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**Note:** Apache and Jserv may not interpret environment variables in their configuration files. Please expand any variables of the form \$ABC used below to the values they actually contain for your installation.

For example, if \$IBY\_TOP is defined at /u03/apps/iby/11.5, you need to replace \$IBY\_TOP with "/u03/apps/iby/11.5" in the instructions below.

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2. Verify that you already have a common Servlet Zone configured in your environment.

A servlet zone should already exist in your Apache Web Server installation. Check jserv.properties for a line beginning with "zone=". If you see such a line, a servlet zone has been set up. This zone is referred to as <SERVLET\_ZONE> in this document. You must replace <SERVLET\_ZONE> with your actual zone name.

3. Configure the ECApp Servlet.

An ECApp servlet is needed in order to use the PL/SQL API for iPayment and for the iPayment 3i backward-compatibility API.

Set up virtual path mapping for ECApp Servlet.

Add the following line to your zone property file, <SERVLET\_ZONE>.properties (remember to replace <SERVLET\_ZONE> with the actual zone name).

```
servlet.ecapp.code=oracle.apps.iby.ecservlet.ECServlet
```

This allows the ECAppServlet to be invoked as  
http://<hostname>:<port>/iby/ecapp where:

<hostname> is the name of the server that is running iPayment, and <port> is the port number for ECAppServlet.

#### 4. Configure the CyberCash Payment System Servlet.

CyberCash Payment System Servlet is only needed if you are planning to process credit card and bank transfer payments through the CyberCash Service. For more information refer to the section on Payment Systems in *Oracle iPayment Concepts and Procedures* or in the Understanding iPayment section of the application online help.

Please follow the steps below to configure Cybercash Merchant Connection Kit, also known as MCK to work with Oracle iPayment.

- a. Set up a merchant account with CyberCash at <http://amps.cybercash.com> if you do not already have one.
- b. Download CyberCash's Merchant Connection Kit (MCK) from <http://cr.cybercash.com>. Follow CyberCash's instructions to install the MCK.
- c. Go to the directory where the MCK C libraries are located. The installation directory should be named `mck-<version>-<operating system>`. For example, if you installed MCK version 3.2.0.6 on Solaris under the `/usr/oracle` directory, you would navigate to the following:

```
% cd /usr/oracle/mck-3.2.0.6-sparc-sun-solaris2.6/c-api/lib
```

- d. Copy the three MCK libraries mentioned below into the `$IBY_TOP/lib` directory:

```
% cp libCCMck.a $IBY_TOP/lib
% cp libmckcrypto.a $IBY_TOP/lib
% cp libmd5hash.a $IBY_TOP/lib
```

- e. Uncomment the following lines from `$IBY_TOP/admin/driver/ibysub01.drv`:

```
# iby      bin      libcybnv.so
# iby      bin      libcybnv.dll
```

so that the lines read:

```
iby      bin      libcybnv.so
iby      bin      libcybnv.dll
```

- f. Build the Interactive adapter executable by running `adadmin`.

Select the option to "Relink Applications Programs", and enter values as follows:

Prompt	Value
Enter list of products to link ('all' for all products) [all]:	iby
Generate specific executables for each selected product [No]?	no

Successful completion of the above step will build the required executable in `$XDP_TOP/bin`. In case of errors, contact your Oracle Support representative.

- g. Set the `wrapper.env` variable in the file `jserv.conf` as follows:

```
wrapper.env=LD_LIBRARY_PATH=$IBY_TOP/lib
```

If there is already a line `wrapper.env=LD_LIBRARY_PATH=...`, then append the above location as you would with the `LD_LIBRARY_PATH` environment variable.

For example, if you have a line

```
wrapper.env=LD_LIBRARY_PATH=$ABC/lib
```

add `:$IBY_TOP/lib` at the end of line. The result should be

```
wrapper.env=LD_LIBRARY_PATH=$ABC/lib:$IBY_TOP/lib
```

- h. Set up a virtual path mapping for CyberCash servlet.

Insert the following line in the zone property file `<SERVLET_ZONE>.properties` which is typically located in the `etc` directory of your top Jserv engine directory (for example, `/d1/testcomn/util/apache/1.3.9/Apache/Jserv/etc`): `servlet.oramipp_cyb.code=oracle.apps.iby.bep.cybercash.CybServlet`.

This allows the servlet to be invoked as:

```
http://<hostname>:<port>/<servlet_zone>/oramipp_cyb
```

- i. Set the servlet init parameters.

There are several initialization parameters that are recognized by the Oracle iPayment Cybercash Servlet. Set these init parameters by inserting the following line in the zone property file `<SERVLET_ZONE>.properties`:

```
servlet.oramipp_cyb.initArgs=mckhome=$MCK_HOME,debug=false,logfile=$IBY_
TOP/log/ibycybserv.log
```

The following are the initialization parameters recognized by the Cybercash Servlet:

### **mckhome**

This parameter is mandatory. It's the directory path that points to the location where the CyberCash Merchant Connection Kit is installed. For example, if a merchant named test-mck has been installed such that its associated files can be found under the directory /usr/oracle/mck/test-mck, then mckhome should be set to /usr/oracle/mck.

Transaction requests to iPayment will fail if mckhome is not set correctly.

### **debug**

This parameter is optional. If set to "true" then the servlet will print debugging information to the body of its responses in plain text. This information includes the inputs sent to the servlet during the request as well as the outputs the servlet sends for its response. If an exception is thrown during the processing of the request, then a stack trace is also printed.

### **logfile**

This parameter is optional. It's a string which specifies the fully qualified path name of the log file location. The input and output values of each transaction are written to this file, as well as stack traces if an exception is thrown. If this parameter is not set, logging will be turned off.

## **5. Configure the Scheduler Servlet.**

This step is required if you want to set up a scheduler in iPayment. A scheduler is required if you process off-line payment operations.

Set up virtual path mapping for Scheduler servlet by adding the following line to the zone property file <SERVLET\_ZONE>.properties:

```
servlet.scheduler.code=oracle.apps.iby.scheduler.PSReqHandler
```

This allows the servlet to be invoked as:

```
http://<hostname>:<port>/iby/scheduler
```

## Oracle eMail Center

### Supplemental Installation Steps

1. Install Oracle Email Server (OES) 5.1 (patchset 3) on the same or on a separate instance as the Oracle Applications Instance. Follow the instructions provided in the *Oracle Email Server Installation Guide* (Installing Oracle Email Server section). Oracle Email Server was formerly known as Oracle Internet Messaging (IM).

In the post-install Email Server configuration, select **NO** for LDAP install. For more information on this step, refer to the *Oracle Email Server Installation Guide* (Configuring Oracle Email Server section).

When the installation process is complete, you can configure the Oracle Email Server instance to talk with the Oracle Applications Instance.

2. Connect to the Oracle Email Server database instance with the **OO** user and password. Grant privilege on IM\_IMT\_EXTN to oraoffice.

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**Note:** The default configuration is single instance. Single instance implies that Oracle Applications data and Oracle Email Server data reside in the same database.

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3. Create a sqlnet tnsnames entry on the Oracle Email Server machine to point to the Oracle Applications Instance. (If installed on an instance separate from Oracle Applications Instance).
4. Create a Database Link to the CRM instance from the Oracle Email Server instance. You need the following:
  - Password for the Oracle Applications APPS schema.
  - Password for the Oracle Email Server OO schema.

Use SQL\*Plus to login to Oracle Email Server as user **OO** (using the **OO** password entered during Oracle Email Server installation) and use the following to create the database link:

```
CREATE DATABASE LINK <link name> CONNECT TO <APPS username> IDENTIFIED  
BY <APPS password> USING <tns / service name>;
```

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**Note:** The name of the above mentioned database link <link name> is used later to configure other eMC components.

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## Email Server Installation

Install Oracle Email Server either in the same APPS database or in a separate database on a different machine. Perform steps 1-4 in both scenarios.

### Scenario 1: OES Installed in the APPS Database

1. The following OES components must be installed per the instructions provided in the OES installation manual.
  - Oracle Email Server 5.1.0.0.1
  - IMAP4 and POP3 protocol servers 5.1.0.0.1
  - Email Administrator 5.1.0.0.1
2. Email Server Post-Installation Tasks
  - a. Login as root and run root.sh from \$ORACLE\_HOME.
  - b. Change the ownership of \$ORACLE\_HOME/bin/ofcpl file to root.
  - c. Modify the imconfig file to point to the correct JRE\_HOME (JRE1.1.8) directory.
3. IM configuration
  - a. Login as oracle (OS user).
  - b. Set the DISPLAY environment variable according to your UNIX shell.  
e.g., setenv DISPLAY <local terminal>:0.0

Shell	Example
csh	setenv DISPLAY crmops.us.oracle.com:0.0
sh, ksh	DISPLAY= crmops.us.oracle.com:0.0; export DISPLAY

- c. Run imconfig under \$ORACLE\_HOME/bin.
- d. Use the table below to enter the required information at the configuration prompts:

Prompt	Recommended Values or Guideline
Enter DomainName	Example: BARRACUDA_DOMAIN
Email Server Node	Choose either default node or custom node. (If uncertain, use the default email server node.)
First Oracle Email Server Node	yes
Enter Node name	Example: BARRACUDE_NODE
Set Password for User admin Password	Example: BARRACUDA
Set Password for Database Users	<ul style="list-style-type: none"> <li>▪ OO password (ex: OO)</li> <li>▪ oraoffice password (ex: oraoffice)</li> <li>▪ OO_DS user password (ex: OO_DS)</li> <li>▪ OO_MAIL user password (ex: OO_MAIL)</li> <li>▪ OO_PUBLIC user password (ex: OO_PUBLIC)</li> <li>▪ OO_SCHED user password (ex: OO_SCHED)</li> </ul>
Do you Want to Enable IMAP4 for Default SMTP Gateway?	yes
New Gateway Name	Use the default (smtp)
Enter Email Domain Name	Example: <db machine name>.us.oracle.com
ldap	no

**4. Sendmail Configuration (UNIX side)**

- a.** Copy the sendmail.cf file to /etc/mail.
- b.** Edit sendmail.cf to modify ORACLE\_HOME, ORACLE\_SID to OES database home, and database SID.
- c.** Use the following commands to check the ClassID:

```
cd $ORACLE_HOME/bin (OES DB)
ofcguard start (start/status/stop)
oomgr admin/<password> (ex: BARRACUDA)
IOFCMGR> show gateway all;
```

The ClassID appears.

- d. Check the ClassID from the database and put the same ClassID in the `sendmail.cf`.

5. Add user group aliases in the `/etc/aliases` file.

### Scenario 2: OES Installed in a Separate Database

Perform the following steps when you install Oracle Email Server in a separate database.

1. A `tns-service` entry for the APPS database needs to be added in `tnsnames.ora` file (in `/etc` or `/var/opt/oracle`) in OES DB machine.
2. A `tns-service` entry for the OES database needs to be added in `tnsnames.ora` file (in `/etc` or `/var/opt/oracle`) in the APPS DB machine.
3. Verify that the SQL\*Net connections from both databases work correctly.
4. Create the following database links in your Oracle Applications database:

- a. Using SQL\*Plus login as the APPS user.

- b. Create the database link <IMLINK>:

```
connect to oraoffice identified by <oraoffice password> using '<tns
service name of OES dbname >';
```

- c. Create a database link to the <OOLINK>:

```
create database link <OOLINK> connect to <OO schemaname> identified by
<OO password> using '<tns service name of OES dbname>';
```

5. Create the following database link in OES database:
  - a. SQL\*Plus login as OO, using OO password that was entered during OES installation.
  - b. Create a database link <appslink> connecting to apps identified by <apps password> using <tns/ service name of APPS dbname>.
6. SQL\*Plus login to OES DB as user OO\_MAIL using OO\_MAIL password that was entered during OES installation.

```
grant select on om_int_msgpart to oraoffice;
```

## **Oracle Email Center Template Hosting Post-Process Installation Steps**

The Email Center (eMC) product supports the use of web forms to generate structured e-mail messages to the Email Center server. (See the eMC documentation for more information on this feature.) To make use of web forms you must first configure the web server to use the Java servlet installed with the eMC product. In cases where the web server does not support Java servlets, the application will default to the use of a CGI script to process the web form and generate the appropriate e-mail message. The performance benefits of using the Java servlet make it the optimal choice.

Perform the following tasks to generate structured email messages using web forms:

1. Determine if your web server supports Java servlets.
2. Determine the location of the web server Java servlet properties file.
3. Configure the web server for the eMC email generation servlet.

The first step to configuring your web server is to determine if the web server supports Java servlets. Most web servers support Java servlets. If your web server does not support Java servlets, then you will have to use the supplied CGI script equivalent on your web server.

When using the Java servlet there is one manual step required for hosting the inbound eMC templates for structured e-mail processing. That is the registering of the eMC Java servlet with the customer web server. The web server has to be capable of hosting servlets. Each web server handles servlets in its own way. Sun's web server has native servlet support. Apache Web Server supports servlets with the add-on Jserv module. Check with your web server administrator for details on your web server's support for servlets.

If your web server does not support servlets then you will need to install the CGI equivalent of the servlet on your web server. Both the servlet and CGI script are included with the 1 to 1 Fulfillment installation (emailgeneratingservlet and emailgeneratingCGI). No configuration steps are required when using the CGI.

After verifying servlet support on the web server, you will have to configure the web server servlet settings. The property settings for servlets are unique to each web server. For example, with Apache Web Server using the Jserv servlet engine. The configuration information needs to be updated in the zone.properties file that is usually found in the Apache Jserv conf directory. Adding the entries given below to the file will configure the servlet.

Example:

```
# Servlet Parameters
# Startup Servlets
servlets.startup=emailgen

# Servlet Aliases
servlet.emailgen.code=EmailGeneratingServlet

# Aliased Servlet Init Parameters
servlet.emailgen.initArgs=hostname=<outgoing SMTP server>,to=<receiving account
for eMC email processing>
```

The parameter values remain the same even if a different web server is used. These parameters are defined as:

- **emailgen:** Name of the servlet
- **EmailGeneratingServlet:** servlet class name
- **Outgoing SMTP server:** SMTP server in the organization that is used to send outgoing emails
- **Receiving account for eMC email processing:** inbound e-mail account name setup for eMC e-mail processing

## Sales and Marketing Applications

This section includes the supplemental installation tasks for the following Oracle CRM application:

- [Oracle Marketing Encyclopedia System](#)
- [Oracle TeleSales](#)

### Oracle Marketing Encyclopedia System

#### Supplemental Installation Steps

1. Using Oracle Marketing Encyclopedia requires modifications to Oracle Workflow directory services views (WF\_ROLES and WF\_USER\_ROLES) to include Oracle Marketing Encyclopedia roles and role users.

To accomplish this, please apply the Oracle Workflow patch for the Bug 1409680 and make sure that the patch is applied successfully.

2. Start the concurrent program MES Matching Engine. This program publishes items into the repository.

## Oracle TeleSales

If you are an Oracle TeleSales customer, please shut down the forms server, back up `appsweb.cfg` (on Solaris, this file is in `$APPL_TOP/html/bin` directory), edit `appsweb.cfg` and append the following to the "JAR files for CRM Products" section:

```
./OA_JAVA/oracle/apps/ast/jar/astiesbn.jar
```

Then re-start the forms server.

## Call Center Applications

This section includes the supplemental installation tasks for the following Oracle CRM applications:

- [Oracle Telephony Manager](#)
- [Oracle Scripting](#)

## Oracle Telephony Manager

### Implementation Requirements

Oracle Telephony Manager uses the Oracle Universal Installer to perform additional configuration steps on the web server node. You will need the *Oracle Call Center Applications Setup* CD in order to perform these steps.

Modules on the *Oracle Call Center Applications Setup* CD include:

- Oracle Scripting Author
- Oracle Telephony Manager and subcomponents (Telephony Media Control, Inbound Telephony Server, Routing Server, and Server Monitor)
- Oracle Email Center
- Oracle Universal Work Queue
- Oracle Interaction Blending

Refer to *Oracle Call Center Applications Setup* on the Oracle Call Center Applications Setup CD-ROM for additional implementation documentation.

## Oracle Scripting

### Supplemental Installation Steps

1. Publish the JNDI name for Oracle Applications server objects:

```
publish -republish -user <APPS-username> -password <APPS-password>
-service sess_iiop://localhost:<IIOP port>:<SID>
/test/oracle/apps/ies/corba/common/Master
oracle.apps.ies.corba.server.MasterImpl
oracle.apps.ies.corba.common.MasterHelper
```

Details are as follows:

- "-user <APPS-username> -password <APPS-password>" specifies the schema where the JNDI name should be published
  - "-service sess\_iiop://localhost:<IIOP port>:<SID>" specifies the URL of the 8i database, with a valid IIOP listener port, and SID
  - "-republish" allows this command to succeed even if the JNDI name already exists
  - "/test/oracle/apps/ies/corba/common/Master" is the JNDI name to be published
  - "oracle.apps.ies.corba.server.MasterImpl" is the Java class to be invoked when the JNDI name is called
  - "oracle.apps.ies.corba.common.MasterHelper" is a helper Java class that is also needed
2. Load Applications JAR files into the database. Using the loadjava utility, load the following JAR files into your database. Log in as the oracle user and make sure your ORACLE\_HOME refers to an 8.1.6 Oracle home and ORACLE\_SID refers to your database.

Details are as follows:

- \$ cd \$JAVA\_TOP/oracle/apps/ies/jar
  - \$ loadjava -user APPS/APPS -resolve -oracleresolver -synonym -definer -oci8 iescommn.jar
  - \$ loadjava -user APPS/APPS -resolve -oracleresolver -synonym -definer -oci8 iesservr.jar
3. Apply Server Technologies (ST) patch

Please apply the backported patch for ST bug 1199486 for your platform. The backport for Sun Solaris is available as patch 1309233. Backports on other platforms may be available at a later date.

4. Apply EWT patch

Apply the ARU patch 1358591. This ARU contains a readme with extensive instructions for installing EWT version 3.3.10, which must be downloaded from tpatch. Make sure to carefully read and follow the instructions in the readme.

5. If you intend to install Oracle Scripting Author, refer to *Oracle Call Center Applications Setup* on the Oracle Call Center Applications Setup CD-ROM for additional implementation tasks.

## Communications and Utilities Applications

This section includes the supplemental installation tasks for the following Oracle CRM applications:

- [Oracle Network Logistics - NATS](#)
- [Oracle SDP Provisioning](#)
- [Oracle CRL Financials](#)

### Oracle Network Logistics - NATS

Using Oracle Network Logistics requires enabling triggers CUN\_MASS\_ADDITIONS\_ARU and CUN\_FA\_RETIREMENTS\_ARI. Accomplish this by running the cuntrg03.sql script on the admin tier.

Using SQL\*Plus, run the script cuntrg03.sql against each APPS user:

```
sqlplus <APPS username>/<APPS password> @$CUN_TOP/patch/115/sql/cuntrg03.sql
```

### Oracle SDP Provisioning

Oracle Provisioning's interactive adapter uses a third-party software called Expect. Expect is a tool used primarily for automating and testing interactive applications such as telnet, ftp etc. Expect is packaged as a set of utilities that can be used as interpreted scripts and as a library that can be linked with the 'C' objects to form an executable. Additionally, Expect is free and in the public domain.

Oracle Provisioning's interactive adapter uses Expect APIs and is required to be linked with the Expect and Tcl libraries. Expect uses Tcl, a general purpose scripting

language, internally. Expect libraries are not distributed platform-wise. Instead, Expect comes packaged as a compressed TAR or ZIP file. Expect is supported on most Posix-compliant operating systems. Most UNIX and other popular platforms conform to Posix standards. The Expect package must be uncompressed on the target platform, and its library must be built using the installation notes which are included in the package.

Oracle does not distribute Expect related libraries along with its products. You are required to download, build, and optionally install Expect and Tcl libraries at your site. After required libraries are successfully built, the interactive adapter executable should be built using the steps documented in this section.

### Building the Interactive Adapter Executable

The following required steps build the interactive adapter executable, XDPNTRCT for UNIX platforms:

1. Download and build Expect and Tcl libraries, libexpect5.30.a and libtcl8.0.a, in Expect and Tcl staging areas as per installation instructions enclosed in their respective packages. More details on Expect are available at <http://expect.nist.gov>.
2. Copy the Expect and Tcl libraries to \$XDP\_TOP/lib directory on the Concurrent Processing (node) Tier.
3. Uncomment the following line from \$XDP\_TOP/admin/driver/xdpsub01.drv:

```
# xdp          bin          XDPNTRCT
```

so that the line reads:

```
xdp          bin          XDPNTRCT
```

4. Build the Interactive adapter executable by running adadmin.
  - a. Select the option "Relink Applications Programs".
  - b. Enter the following values at the corresponding prompts:

Prompt	Value to Enter
Enter list of products to link ('all' for all products) [all]:	xdp
Generate specific executables for each selected product [No]?	yes
Enter executables to relink, or enter 'all' [all]:	XDPNTRCT

Successful completion of above step will build the required executable in \$XDP\_TOP/bin. In case of errors, contact your Oracle Support representative.

## Oracle CRL Financials

### Enabled Assets

Perform the following steps before using CRL functionality.

### Post-Installation

Setup CRL Profile (Required)

If you are licensed to use CRL-FA and want to use the CRL Fixed Assets functionality, then run the following script as the apps user.

```
$CUA_TOP/patch/115/sql/FACSTPRF.sql
```

### Pre-Upgrade

If you already have CRL Enabled Assets installed and wish to upgrade to Oracle Assets/CRL 11i, please do the following to ensure successful upgrade.

1. Disable any CRL Enabled Assets responsibilities and Oracle Asset responsibilities. (Required)
2. Check CRL responsibility being used.

---

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**Caution:** Oracle Assets 11i installs CRL with a seeded responsibility as CRL Assets Manager. Make sure that a responsibility with this name does not exist on your system at the time of upgrade.

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### Post-Upgrade

1. Setup CRL Profile (Required)

If you are licensed to use CRL-FA and want to use the CRL Fixed Assets functionality then run the following script as the apps user.

```
$CUA_TOP /patch/115/sql/FACSTPRF.sql
```

2. Setup Key Flexfields (Required)

The new key flexfields need to be configured to match the old flexfield configuration. The following table lists the new key flexfields and the corresponding old key flexfields that need to be re-configured.

<b>Old Key Flexfield Name</b>	<b>Old Application Name</b>	<b>New Key Flexfield Name</b>	<b>New Application Name</b>
Group Asset	Oracle CRL Enabled Assets	Group Assets	Oracle Assets
Super Group	Oracle CRL Enabled Assets	Super Group	Oracle Assets

### 3. Setup Descriptive Flexfields (Required)

The new descriptive flexfields need to be configured to match the old flexfield configuration. The following table lists the new descriptive flexfields and the corresponding old descriptive flexfields that need to be re-configured.

<b>Old Desc Flexfield Name</b>	<b>Old Application Name</b>	<b>New Desc Flexfield Name</b>	<b>New Application Name</b>
IFA_HIERARCHY_DESC_FLEX	Oracle CRL Enabled Assets	FA_HIERARCHY_DESC_FLEX	Oracle Assets
IFA_HIERARCHY_RULE_DESC_FLEX	Oracle CRL Enabled Assets	FA_HIERARCHY_RULE_DESC_FLEX	Oracle Assets

### 4. Drop obsolete tables ONLY after confirming that your data was successfully upgraded. (Optional)

Use the following script to delete these tables.

```
$CUA_TOP/patch/115/sql/FACDTAB.sql
```

- ifa\_books\_groups
- ifa\_group\_assets
- ifa\_group\_asset\_default
- ifa\_group\_asset\_rules
- ifa\_group\_deprn\_detail
- ifa\_group\_deprn\_rates
- ifa\_group\_deprn\_summary

- ifa\_super\_groups
  - ifa\_super\_group\_rules
  - ifa\_mass\_external\_transfers
  - ifa\_mass\_ext\_retirements
  - ifa\_ext\_inv\_retirements
  - ifa\_mass\_ext\_ret\_excepts
  - ifa\_parallel\_workers
  - ifa\_system\_controls
  - ifa\_asset\_hierarchy
  - ifa\_asset\_hierarchy\_values
  - ifa\_hierarchy\_rule\_set
  - ifa\_hierarchy\_rule\_details
  - ifa\_exclude\_hierarchy\_levels
  - ifa\_asset\_hierarchy\_purpose
  - ifa\_mass\_update\_batch\_headers
  - ifa\_mass\_update\_batch\_details
  - ifa\_hr\_retirement\_headers
  - ifa\_hr\_retirement\_details
  - ifa\_hierarchy\_controls
  - ifa\_hierarchy\_distributions
  - ifa\_life\_derivation\_info
  - ifa\_mc\_group\_deprn\_summary
  - ifa\_mc\_group\_deprn\_details
  - ifa\_mc\_books\_groups
  - ifa\_mass\_additions
5. Drop obsolete views **ONLY** after confirming that your data was successfully upgraded. (Optional)
- Use the following script to delete these views.

---

\$CUA\_TOP/patch/115/sql/FACDVWS.sql

- IFA\_ASSET\_HIERARCHY\_Dfv
- IFA\_ASSET\_HIERARCHY\_PURPOSE\_V
- IFA\_ASSET\_HIERARCHY\_V
- IFA\_ASSET\_HIERARCHY\_VALUES\_V
- IFA\_ASSET\_HRCHY\_DETAILS\_V
- IFA\_BOOKS\_GROUPS\_V
- IFA\_BOOKS\_GROUPS\_V1
- IFA\_CHILD\_ASSETS\_V
- IFA\_CURR\_DEPRN\_ADJ\_V
- IFA\_DEPRN\_GROUPS\_V
- IFA\_DEPRN\_GROUPS\_V1
- IFA\_GROUP\_ASSETS\_KFV
- IFA\_GROUP\_COST\_INQUIRY\_V
- IFA\_HIERARCHY\_BATCH\_DETAILS\_V
- IFA\_HIERARCHY\_BATCH\_HEADER\_V
- IFA\_HIERARCHY\_DISTRIBUTIONS\_V
- IFA\_HIERARCHY\_RULE\_DETAILS\_V
- IFA\_HR\_BATCH\_DIST\_NEW\_V
- IFA\_HR\_BATCH\_DIST\_OLD\_V
- IFA\_HR\_RETIREMENT\_DETAILS\_V
- IFA\_HR\_RETIREMENT\_HEADERS\_V
- IFA\_MASS\_EXTERNAL\_TRANSFERS\_V
- IFA\_MASS\_EXT\_RETIREMENTS\_V
- IFA\_MUPD\_V
- IFA\_SOURCE\_LINES\_V
- IFA\_SUPER\_GROUPS\_KFV

- IFA\_LIFES\_V

**6. Reduce obsolete columns after confirming your upgrade. (Optional)**

Use the following script to delete these columns.

```
$CUA_TOP/patch/115/sql/FACDCOL.sql
```

- fa\_mass\_additions.group\_asset\_id
- fa\_mass\_additions.ifa\_parent\_hierarchy\_id
- fa\_category\_book\_defaults.ifa\_life\_end\_date
- fa\_category\_book\_defaults.ifa\_rule\_set\_id
- fa\_books.group\_asset\_id

**7. Drop obsolete triggers after confirming your upgrade. (Optional)**

Use the following script to delete these triggers:

```
$CUA_TOP/patch/115/sql/FACDTRG.sql
```

- IFA\_ADDITIONS\_HR\_ARD
- IFA\_ADJUST\_UNITS\_ARI
- IFA\_ADJUST\_UNITS\_ARU
- IFA\_ASSET\_INVOICES\_BRI
- IFA\_BOOKS\_GROUPS\_BRI
- IFA\_BOOK\_CONTROLS\_BRU
- IFA\_MASS\_ADDITIONS\_ARU
- IFA\_RETIREMENTS\_BRU
- IFA\_RETIRMENTS\_ARU
- IFA\_TRANSACTION\_HEADERS\_ARI2
- IFA\_TRANSACTION\_HEADERS\_ARI3
- IFA\_TRANSACTION\_HEADERS\_HR\_BRI

**8. Drop obsolete packages after confirming your upgrade. (Optional)**

Use the following script to delete these packages:

```
$CUA_TOP/patch/115/sql/FACDPKG.sql
```

- IFADEPR
  - IFA\_ASSET\_APIS
  - IFA\_ASSET\_WB\_APIS\_PKG
  - IFA\_BOOKS\_GROUPS\_PKG
  - IFA\_CALC\_NBV\_PKG
  - IFA\_CLIENT\_EXTENSION
  - IFA\_DERIVE\_ASSET\_ATTR\_PKG
  - IFA\_EXT\_TRANSFERS\_PKG
  - IFA\_FLEX\_BLD\_PKG
  - IFA\_FLEX\_BUILD\_PKG
  - IFA\_GROUP\_RET\_ADJ\_PKG
  - IFA\_HIERARCHY\_DISTRIBUTION\_PKG
  - IFA\_HIERARCHY\_PKG
  - IFA\_HIERARCHY\_PURPOSE\_PKG
  - IFA\_HIERARCHY\_RULE\_DETAILS\_PKG
  - IFA\_HIERARCHY\_VALUES\_PKG
  - IFA\_HR\_REINSTATEMENTS\_PKG
  - IFA\_HR\_RETIREMENTS\_PKG
  - IFA\_INVOICE\_TRANSACTIONS\_PKG
  - IFA\_MASS\_EXT\_RET\_PKG
  - IFA\_MASS\_UPDATE1\_PKG
  - IFA\_MASS\_UPDATE2\_PKG
  - IFA\_RECLASS\_PKG
  - IFA\_SYSTEM\_CONTROL\_PKG
9. Refer to the *Oracle CRL Financials Implementation Guide* on the Oracle Applications, Release 11i Documentation CD-ROM for additional post-installation and implementation tasks. (Required)

## CRL Enabled Projects

Perform the following post installation/upgrade steps to use the CRL Projects functionality.

### 1. Setup CRL Profile

If you are licensed to use CRL-PROJECTS and want to use the CRL Projects functionality then set the profile "PA:Licensed to use CRL projects" to **Yes** at the site level.

### 2. The CRL Projects Manager responsibility must be enabled by setting the effective end date to **null**.

### 3. The two client extensions packages for CRL - Project customers must be modified to uncomment the default CRL Projects functionality and applied. The packages are:

- PA\_CLIENT\_EXTN\_GROUPING (IPAGCEB.pls)
- PA\_CLIENT\_EXTN\_GEN\_ASSET\_LINES (IPAGALCB.pls)

### 4. Setup Descriptive Flexfields (Required)

Descriptive flexfields must be configured as documented in *Oracle CRL-Financials Enabled Projects Concepts and Procedures, Release 11i*. This setup must be done manually.

The following table lists the new key flexfields and the corresponding old key flexfields that need to be re-configured.

Descriptive Flexfield Name	Columns	Value Set Used	Application Name
Expenditure Items	Attribute8 Attribute9 Attribute10	Depends on the naming convention. Refer to the <i>Oracle CRL Projects Concepts and Procedures</i> manual.	Oracle Projects
Expenditure Types Desc flex	Attribute9 Attribute10	PA_SRS_YES_NO_LOV PA_SRS_YES_NO_LOV	Oracle Projects
Projects	Attribute10	PA_SRS_YES_NO_LOV	Oracle Projects
Tasks	Attribute9	PA_SRS_YES_NO_LOV	Oracle Projects

- For new CRL customers, make sure these descriptive flex field attributes are not used for other purposes. In addition, CRL post-installation/upgrade mandatory patch 1238551 needs to be applied.
  - Existing CRL Projects users must verify with these descriptive flexfields for accuracy.
5. Refer to the *Oracle CRL Financials Implementation Guide* on the Oracle Applications, Release 11i Documentation CD-ROM for additional post-installation and implementation tasks. (Required)

