Oracle® CRM Foundation

Implementation Guide

Release 11*i*

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Oracle CRM Foundation Implementation Guide, Release 11*i*

Part No. A88819-01

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Oracle CRM Foundation Implementation Guide, Release 11*i*

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- Are the examples correct? Do you need more examples?

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

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Preface

Welcome to the **Oracle Customer Relationship Management, Release 11*i*,** suite of applications.

This CRM Foundation Implementation guide provides information and instructions to help you effectively set up the Oracle CRM Foundation modules.

This preface explains how the Implementation guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)

- Customer Service Representatives (CSR)

- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility.

This guide assumes you have the following pre-requisites:

- Understanding of the company business processes.

- Knowledge of products and services as defined by your marketing policies.

- Basic understanding of Oracle and Developer/2000.

- Background in SQL, PL/SQL, SQL* Plus programming.

Structure

This manual is a compilation of the topics in the online help for Oracle CRM Oracle Foundation components. It contains the following topic sections:

"Understanding" topics provide overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

"Using" topics provide process-oriented, task-based procedures for using the application to perform essential business tasks.

"Administering" topics provide task-based procedures for required for ongoing system maintenance and includes information on administration tools and utilities.

Related Documents

For more information, see the following manuals:

- *Oracle CRM Foundation Concepts and Procedures Guide*
- *Oracle CRM Foundation Technical Reference Manual*

Implementing the System Administrator Console

This topic group provides general descriptions of the set up and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process

Related Documentation

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Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11i Overview of CRM Foundation, Course Description ID 8831.

Setting Up the HTML Tech Stack

After installation of the Oracle CRM Family Pack1, the system administrator is the only pre-defined user of the Oracle CRM applications. The system administrator must create a guest user, register the user and assign roles to the user.

Prerequisites

1. Perform the Rapid Install and any necessary patches.

   For details, see Installing Oracle Applications, Release 11i (A87333-01)

2. Perform the ERP Functional Checklist.

   Go to Metalink to obtain the latest version.

Steps

Perform the following steps to setup the HTML Stack.

Steps	Task
❏ 1	Perform post-install steps.
❏ 2	Create the guest user account
	■ Create a guest user account in Oracle Forms.
	■ Determine Application ID and Responsibility ID in Oracle Forms.
	■ Set up the guest user account in the Admin Console.
	■ Assign business and end user default responsibilities.
	■ Bounce the Apache server.
❏ 3	Set profile options.
❏ 4	Run the Diagnostic Tool.

Performing the Post-install Steps

Prerequisites

None.

If the Apache server is running on a UNIX platform, then you must set the file handle limit before restarting the Apache server. Depending on the type of UNIX shell running, the command will be a variation of the following types of commands:

`ulimit or limit.`

Steps

1. Verify the limit for descriptors at the command line.

2. Set the limit for the descriptors to 1024.

   For example:

   ```
   ulimit -s -n 1024
   ```
   or

   ```
   limit descriptors 1024.
   ```
3. Verify your changes.

4. Restart the Apache server.

Creating a Guest User Account

To create a guest user account, you must perform several tasks in both Oracle forms and the Admin Console.

Prerequisites

Perform all steps in Performing the Post-install Steps.

Steps

1. Navigate to the System Administrator responsibility and select **Security > User > Define**. The Users window opens.

2. Enter the guest user name in the Name field.

3. Enter a password.

   You must enter the same password twice in the same field.

4. Select the responsibilities from the LOV in the Responsibility field to the guest user.

5. Select **File > Save**.

6. Repeat the steps to grant appropriate responsibilities to the end user and business user if possible.

Determining Application ID and Responsibility ID

To create a guest user account, you must perform several tasks in both Oracle forms and the Admin Console.

Determining Application ID and Responsibility ID is the last step in creating the guest user account in Oracle Forms. After this step, you will continue to set up the guest user account in the Admin Console.

Obtain the application and responsibility ID information. This information will be used later as the default responsibility. Assign it to the guest user in the Admin Console.

Prerequisites

Perform all steps in Creating a Guest User Account in Oracle Forms.

Steps

1. Navigate to the System Administrator responsibility and select **Security > Responsibility > Define.**

   The Responsibilities window opens.

2. Select **View > Find...** from the application menu. Enter the same responsibility name you granted to the guest user in the Responsibility Name field.

3. Ensure that the cursor is in the Responsibility Name field and navigate to **Help > Diagnostics > Examine...** in the menu at the top of the form.

   The Examine Field and Variable Values dialog box opens.

4. Enter the password in the Enable Diagnostics dialog box if necessary.

5. Open the Field selector.

   (Open the selector by double-clicking the "..." box next to the Field text area.) The Choose a Field dialog box opens.

6. Select Application_ID from the list, and click **OK**. Record the value that appears in the Value field.

7. Open the Field selector again.

8. Select Responsibility_ID from the list, and click **OK**. Record the value that appears in the Value field.

9. Click **Cancel** to exit the dialog box.

Setting Up the Guest User Account in the Admin Console

To create a guest user account, you must perform several tasks in both Oracle forms and the Admin Console.

Set up the guest user created in Oracle Forms by logging in as the System Administrator in the jtfdefaultlogin.jsp page. The guest user allows the jtflogin.jsp to work and also allows other users to self-register.

To open the jtfdefaultlogin.jsp page, enter its URL:

```
http://<host.domain_name>:<port>/<docroot>/jtfdefaultlogin.jsp
```

Use the following for the variable parameters:

- **host.domain_name**: The hostname where the Apache Server is installed. For example, apo23sum.us.oracle.com is a fully qualified host name.

- **port**: The port on which the Apache Web listener is configured.

- **docroot**: The document root defined for the Apache Server that contains the jsp pages.

If necessary, obtain these parameters from the web system administrator.

Perform the following steps to set up a guest user.

Prerequisites

Perform all steps in Determining Application ID and Responsibility ID in Oracle Forms.

Steps

1. Navigate to the Admin Console jtfdefaultlogin.jsp page using the SYSADMIN responsibility and password SYSADMIN.

2. Select the Advanced tab and click **Properties**.

3. To the right of View, click on the drop down menu and select JTF.

4. Verify if guest name and password already exist. If not, click **Create**.

5. Update the guest_username key with the value set to the guest user's user name.

6. Click **Update** to save your work.

7. Update the guest_password key with the value set to the guest user's password.

8. Click **Update** to save your work.

Assigning Business and End User Default Responsibilities

To create a guest user account, you must perform several tasks in both Oracle forms and the Admin Console.

Registration allows two types of users:

- *Business users* are individuals who represent an organization. They must be approved through the Registration tab.

- *End users* are individuals who are not associated with an organization. They are automatically approved after the account has been created.

Example:

- Business User 1: Jane Doe works at ABC Corporation and registers as a business user. The System Administrator approves all business users, like Ms. Doe, through the Registration tab.

- Business User 2: Sally Roe works at DEF Inc. and registers as a business user. As her company is not currently registered, she must enter additional information pertinent to her company as she registers. Again, the System Administrator must approve her through the Registration tab.

- End User: Doug Brown does not belong to any organization or company and wants his own personal account. He registers and his account is automatically approved after the account is created.

The system administrator must assign a default responsibility to each type of user to implement the self-registration service.

Use this procedure to assign a default responsibility to end users and business users.

Prerequisites

Perform all steps in Setting Up the Guest User Account in the Admin Console.

Steps

1. Navigate to the Admin Console jtfdefaultlogin.jsp page using the SYSADMIN responsibility and password SYSADMIN.

   The default login page opens.

2. Select the Setup tab and click **Registration > Default Responsibility.**

   The Register Default Responsibility window opens.

3. Choose the appropriate account type and enter the Application ID and Responsibility ID that you recorded earlier for the end and business user.

4. Click **Submit** to complete the Default Responsibility setup.

5. Select the Setup tab and click **Registration > Default Roles**.

   The Select Account Type and Domain window opens. This window contains two lists:

   - Account Type
   - Domains

6. Select one item in each list and click **Next**.

The Groups window opens and displays two lists:

- Available Roles

- Assigned Roles

7. Select one or more Available Roles and click **>** to move it to the Assigned Roles list. The roles in the Assigned Roles list will be assigned to the user type you previously selected.

   - Click **>>** to move all Available Roles onto the Assigned Roles list.

   - Click **<<** to move all Assigned Roles onto the Available Roles list.

8. Click **Update** to complete the role assignment.

Bouncing the Apache Server

To create a guest user account, you must perform several tasks in both Oracle forms and the Admin Console.

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.

Setting System Profile Options

Use the following list to identify the profile options that need to be set for your specific implementation. You can set these profile options in any order.

- JTF_PROFILE_DEFAULT_APPLICATION

- JTF_PROFILE_DEFAULT_RESPONSIBILITY

- JTF_PROFILE_DEFAULT_CSS

- JTF_PROFILE_DEFAULT_BLANK_ROWS

- JTF_PROFILE_DEFAULT_NUM_ROWS

- JTF_PROFILE_DEFAULT_CURRENCY

- JTF_ACCOUNT_TYPE_END_USER

- JTF_ACCOUNT_TYPE_BUSINESS_USER

- ICX_DATE_FORMAT_MASK

- ICX_LANGUAGE

- ICX_TERRITORY

- ICX_CLIENT_IANA_ENCODING

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option **JTF_PROFILE_DEFAULT_APPLICATION**

Stores default application ID for user. Set at the User level. The default application ID is the application to which the user is directed after login.

Required	User can		Admin Setting Levels			
	View	**Update**	**User**	**Responsibility**	**Application**	**Site**
X	X	X	X			X
Setting	**Description and Usage Considerations**					
	The default value at user level is 690 for sysadmin.					

Profile Option **JTF_PROFILE_DEFAULT_RESPONSIBILITY**

Stores default responsibility ID for user. Set at the User level. The default responsibility is the responsibility with which the user is logged in.

Required	User can		Admin Setting Levels			
	View	**Update**	**User**	**Responsibility**	**Application**	**Site**
X	X	X	X			X
Setting	**Description and Usage Considerations**					
	The default value at user level is 21841 for sysadmin					

Profile Option **JTF_PROFILE_DEFAULT_CSS**

Stores the style sheet preference for the User. Values come from FND lookup, JTF-STYLE-SHEET-LOOKUP-TYPE.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X
Setting	Description and Usage Considerations					
	The default value is JTFUCSS.CSS at site level.					

Profile Option JTF_PROFILE_DEFAULT_BLANK_ROWS

Stores the default number of blank rows to be displayed to the user. Values come from FND lookup, JTF_BLANK_ROWS_LOOKUP_TYPE.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X
Setting	Description and Usage Considerations					
	The default value is 5 at site level					

Profile Option JTF_PROFILE_DEFAULT_NUM_ROWS

Stores the default number of rows to be displayed to the user. Values come from FND lookup, JTF_DISPLAY_ROWS_LOOKUP_TYPE.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X
Setting	Description and Usage Considerations					
	The default value is 10 at site level					

Profile Option JTF_PROFILE_DEFAULT_CURRENCY

Stores the default currency setting of the user. Value is the currency code from fnd_currencies_vl_view.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X
Setting	**Description and Usage Considerations**					
	The default value is USD at site level					

Profile Option **JTF_ACCOUNT_TYPE_END_USER**

Stores the application ID and responsibility ID to be granted for a newly registered end user. The Site-level value represents the application ID; the Application-level value represents the responsibility ID.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X			X	X

Profile Option **JTF_ACCOUNT_TYPE_BUSINESS_USER**

Stores the application ID and responsibility ID to be granted for a newly registered business user. The Site-level value represents the application ID; the Application-level value represents the responsibility ID.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X			X	X

Profile Option **ICX_DATE_FORMAT_MASK**

Stores the date format mask. This profile is owned by AOL/J team.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X			X	X

Profile Option ICX_LANGUAGE

Stores the current/default language for the user. This profile is owned by AOL/J team.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X			X	X

Profile Option ICX_TERRITORY

Stores the current/default territory for the user. This profile is owned by AOL/J team.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X			X	X

Profile Option ICX_CLIENT_IANA_ENCODING

Stores the charset encoding information at the site level. This profile is owned by AOL/J team.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X			X	X

Running the Diagnostic Tool

Through the Diagnostic Tool, you can access system diagnostic information for both forms-based and HTML-based CRM modules. You are able to:

- Run diagnostic tests

- View the diagnostic reports

Access the Diagnostic Tool through one of the following:

- Click the **Diagnostics** link in the banner menu in the Admin Console.

- Type in the URL in the Location Bar which is supplied by your system administrator, similar to:

```
http://<machine_name>.<domain_name>:<port_ID>/OA_HTML/jtfqalgn.htm
```

> **Note:** If you are unable to access the link through the Admin Console, you can access the same diagnostic tests through the independent URL.

Running Diagnostic Tests

You can select an application product or product family to run tests against by choosing it from the Application LOVs. A product module must be registered with the Diagnostic Tool before the diagnostic tests for it become available.

The Diagnostic Tool contains three functional areas:

- **Basic:** Use the links on this tab to automatically run all the listed diagnostic tests or to run specific tests. Test input parameter values are defined on the Configuration tab.

- **Advanced:** Use the links on this tab to test specific CRM modules or groups. Test input parameter values for the specific test are entered directly in this window.

- **Configuration:** Use this window for test and group administration and to configure any necessary test input parameters.

> **Note:** Consult the Diagnostic Tool user interface for a description of each test.

Viewing the Diagnostic Reports

After a test is run, a summary appears on the Results window. To access the report, double-click the report icon.

> **Note:** One issue with the HTML modules is the inability of a user to log in to the console. Quite frequently, this has nothing to do with the setup of the HTML Tech Stack or the Admin Console. The problem is that user data, especially numeric data, is entered incorrectly during user definition. This can effectively make it impossible to log in to the console and correct the problem. The independent URL for the Diagnostic Tool then becomes the portal for pinpointing and correcting the error.

Workflows in HTML Tech Stack

There are no Workflows associated with the HTML Stack.

Implementing Territory Management

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*

- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*

- *Oracle CRM Foundation Components Concepts and Procedures*

- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process

Related Documentation

Document	Purpose
Implementing CRM Applications, A853401-01	Contains post-installation information on various CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11i Overview of Implementing Foundation, Course Description ID 8831.

Setting Up Territory Management

Prior to using Oracle Territory Management, you must set up and configure a number of items including qualifiers, territory types, and the specific territories.

Prerequisites

None

Steps

Perform the steps following to set up the Oracle Territory Management.

Step	Required?	Action	Window Name(s)
1	Yes	Set up and/or define qualifiers.	Setup Qualifier
		By default, all qualifiers are disabled. Before you use a qualifier to define territories, you must enable the qualifier. Use the Setup Qualifier window to enable or disable qualifiers.	
		You may also create your own qualifiers. See Creating Custom Qualifiers for details.	
2	Optional	Define the territory types.	Create Territory Type
		See Creating Territory types for details.	

Step	Required?	Action	Window Name(s)
3	Yes	Define the territories. See Different Ways of Creating Territories for details.	Navigator
4	Yes	Compile the rules using the generating rule engine. This compiles all the rules you have defined into a Rule Engine (PL/SQL package).	Generate Territory Package (Concurrent Program)

Guidelines

The following flow chart illustrates the process of setting up the Oracle Territory Management.

Territory Manager Set Up Flow Chart

```
                          ┌──────────────┐
                          │    Start     │
                          └──────┬───────┘
                                 │
                          ┌──────▼───────────┐
                          │ Setup/Define Qualifiers │
                          └──────┬───────────┘
                                 │
                          ◇──────▼──────◇
                          │ Use Terr Type? │
      No ◄────────────────◇─────────────◇
      │                          │ Yes
      │                          │
      │   ┌──────────────────┐   │         ┌──────────────────────┐
      │   │ Define Territory │───┼──Yes───►│ Mass create territories │
      │   │     Types        │   │         │   using Wizard        │
      │   └──────────────────┘   │         └──────────────────────┘
      │            ▲             
      │       ◇────┴─────◇       
      │       │ Autocreate │      
      │       │ Territories│      
      │       ◇──────────◇        
      │            │ No            
      │   ┌────────▼─────────┐    
      │   │ Define Territories│   
      └──►│  With/Without     │   
          │ Territory Types   │   
          └────────┬──────────┘   
              ◇────▼─────◇            ┌──────────────┐
          No  │Add Escalation│──Yes──►│Add Escalation│
          ◄───│   Terr?     │         │  Territory   │
              ◇───────────◇           └──────────────┘
                   │ No
              ◇────▼────◇
              │Done Creating│
              │Territories? │
              ◇──────────◇
                   │ Yes
          ┌────────▼─────────┐
          │Generate Rule Engine│
          │by submitting the  │
          │concurrent program │
          └────────┬──────────┘
                   │
            ┌──────▼───────┐
            │     End      │
            └──────────────┘
```
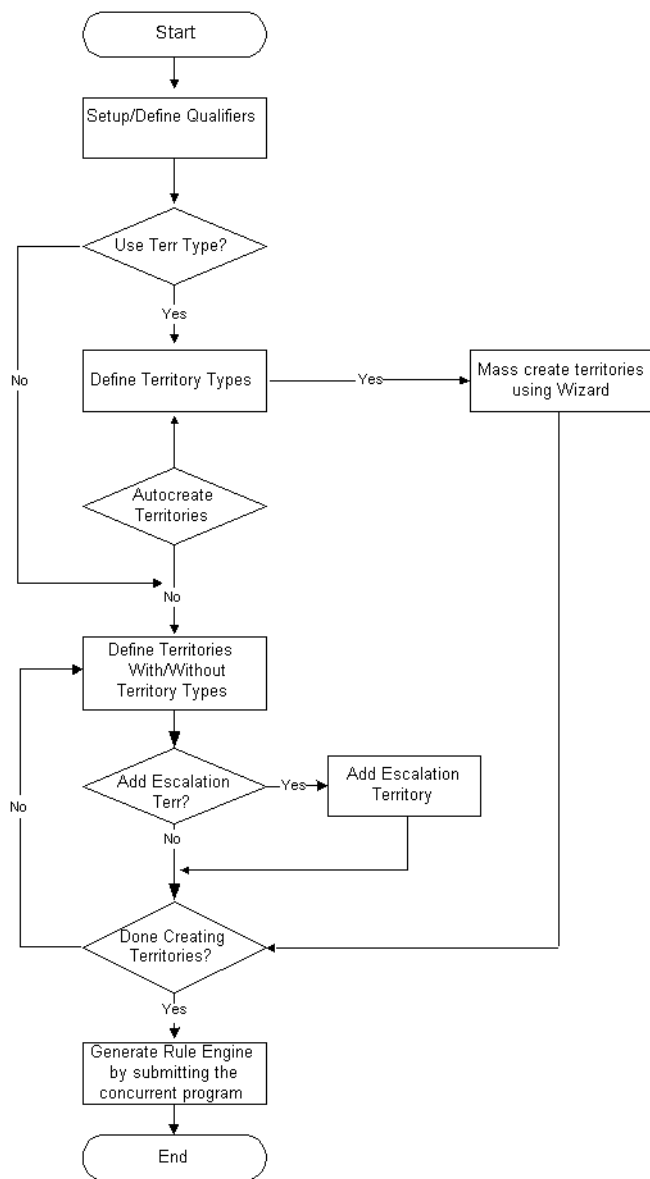
Before setting up all your territories, set up two or three first. Generate the package and test territory assignments to make sure that transactions are correctly assigned. When these few territories work correctly, continue setting up all territories.

Troubleshooting

You may find the following tips to be useful.

1. Always set up territories in hierarchical fashion. This is extremely critical for the Territory Manager to work properly.

2. Make the territories as generic as possible.

3. If you create a territory and do not assign resources to it, then the Territory Manager does not return this territory as a qualifying territory.

    This is useful if you want to define a territory merely as a place holder territory in the hierarchy. An example of this could be "CA Territory".

4. You can create your own module specific "Catch All."

    Create a territory with the highest rank and assign resources to it, but do *not* assign any qualifiers and values. In that case, the rest of the territories will then be defined as its children.

Setting the System Profile Option

Oracle Territory Management uses one profile option, TERR:Multiple Winning Territories.

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option TERR:Multiple Winning Territories

This profile option sets the number of qualifying territories to return.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X					X
Setting	**Description and Usage Considerations**					
Single Winner	Select the most qualifying territory.					
Multiple Winner	Select all qualifying territories.					
Note that selecting the Multiple Winner option can impact performance.						

This system profile option controls how Territory Management assigns transactions to competing winning territories. This occurs whenever a transaction satisfies the criteria of more than one territory at any level in the territory hierarchy.

This system profile has two possible values:

- **Multiple**: Territory Management assigns a transaction to all winning territories.

- **Single (the** default setting): Territory Management assigns the transaction to a single territory at each level in the territory hierarchy. The rank of competing territories determines which territory is the winner.

Assume, for example, that your company organizes its territories by customer name and by geographical area. You have two company territories, IBM and Sun, and a postal code territory that encompasses all of the postal codes within the United States.
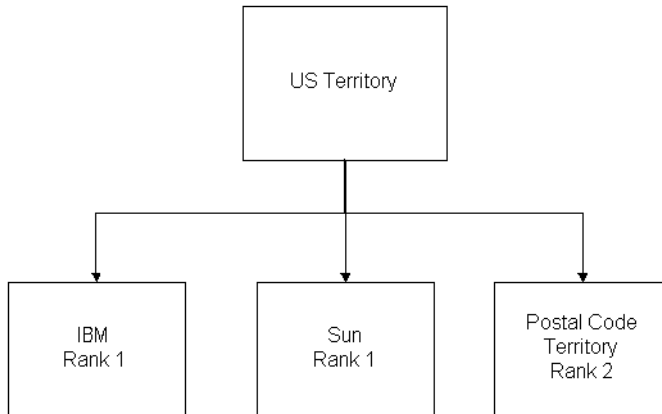
If a your company receives a transaction from an IBM branch within the Unites States, then that transaction satisfies the criteria for both the IBM territory and the postal code territory.

If TERR: Multiple Winning Territories is set to multiple, then Territory Management assigns the transaction to both territories.

If this system profile is set to single, then Territory Management assigns the transaction only to the IBM territory because the IBM territory has a higher rank.

Implementing Resource Manager

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components, Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

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Related Courseware

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Setting Up Oracle Resource Manager

In addition to the pre-defined Role Types and Role Information, you can define new Role Types and Roles.

Steps

Step Number	Required?	Oracle Resource Manager Setup Step Description	Window Name(s)	AIW Reference
❑ 1	Optional	Define Role Types	Application Object Library: JTF_RS_ROLE_TYPE Lookups	N/A
❑ 2	Optional	Define Resource Roles	Roles	N/A

Defining Role Types

A Role Type is a category of roles associated with a particular CRM module. Oracle Resource Manager is delivered with pre-defined Role Types for all CRM modules. Use this procedure to define additional custom Role Types for your enterprise.

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Setup > Role Types**.

   The Application Object Library window displays existing Role Types.

2. Use the down arrow to scroll to the bottom of the list of Role Types.

3. Enter the name of the new Role Type in the blank field at the bottom of the list.

4. In the Meaning field, enter the CRM module for which this Role Type is created.

5. Choose File > Save to complete the Role Type definition.

Defining Resource Roles

A Role may encompass one or more job descriptions and job titles. Use Roles to assign jobs to resources, resource groups and resource teams. Oracle Resource Manager is delivered with pre-defined Roles for all CRM modules. Use this procedure to define additional custom Roles for your enterprise.

Prerequisites

Make sure that a Role Type exists with which you can associate the new Role.

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Setup > Roles**.

   The Roles window displays fields you can use to define a role.

2. Enter your values in the Code and Name fields. Choose a Role Type from the list of values.

3. Select the Active box to make the Role active. Select one or more of the job title boxes–Manager, Member, Admin, Lead–to associate the Role to job titles.

4. Use one or more of the Job lines to describe jobs associated with the Role.

5. Select **File > Save** to complete the Role definition.

   The new role name registers in the Role Name field in Resource Manager.

References

Creating and Defining Resources

Defining Dynamic Groups

Resource Role Boxes

Check Box	Action
Member	Identifies the role name as a member of the role type
Lead	Identifies the role name as a lead for the role type
Active	Identifies the role as active
Administration	Identifies the role as administrative
Manager	Identifies the role as managerial
Seeded (Read Only)	Identifies the role type as seeded

Defining Dynamic Groups

Determine the group values available to the user in Resource Manager. By defining the name, usage values, and effective dates of a group, you ensure the correct use of groups and limit the individuals who have access to create them. Use this procedure to define a dynamic group.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Dynamic Groups**.

   The Dynamic Groups window opens.

2. Define and enter a group name in the Name field.

3. Select a group usage from the Usage field.

4. Select the effective dates for the group from the list of values in the Start and End fields.

5. Enter a brief description of the group name and usage in the Description field.

6. Save the group.

   The new group name registers in the Group Name field in Resource Manager.

Guidelines

Alternatively, you can define a group name by entering a SQL statement in the SQL Statement field and saving. Clicking **Check Syntax** checks your code for syntax errors.

References

Creating and Defining Resources

Defining Resource Roles

Setting Profile Options

Resource Manager does not use profile options.

Workflows in Oracle Resource Manager

Resource Manager does not use Workflow processes.

Defining Teams and Groups

See the following procedures for customizing Resource Manager for your enterprise:

Defining Resource Teams

Defining Resource Groups

Implementing Notes

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation* Components *Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process

Related Documentation

Document	Purpose
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- *11i Overview of Implementing Foundation*, Course Description ID 8831.

Post-Installation Set Up Tasks for Oracle Notes

After the Foundation modules have been installed, you may perform the following optional tasks:

Step Number	Required?	Oracle Notes Setup Step Description	Window Name(s)
❑ 1	Optional	Set Up Note Types	Notes Setup > Note Type Lookups
❑ 2	Optional	Map Note Types to a Source	Notes Setup > Source and Note Type Mapping
❑ 3	Optional	Set Up the Source Object Code	Task and Escalation Manager > Setup

Setting Up Note Types

Oracle Notes comes with a set of predefined note types. You can create additional customized note types. You may also choose to not use the predefined note types Perform the following steps to create new note types.

> **Note:** To delete an existing note type, assign an end date to that note type.

Prerequisite

You must log on under the CRM Administrator account to perform this task.

Steps

1. Select CRM Administrator from the list of logon responsibilities.

    The CRM Administrator Navigator opens.

2. Expand the Notes Setup node.

3. Select Note Type Setup

    The Application Object Library: Note Type Lookups form window opens.

4. Define the code, meaning, and description as desired.

    You only need to define a tag for a new, customized note type.

5. Save this record when you have finished.

Defining Note Types

You can configure Notes to limit the choices of task type. When you provide a list of values for the Note Type fields, the note creator cannot enter an incorrect value, Instead, the user chooses from a pre-defined menu of note types. Use this procedure to define note types for your users.

Prerequisites

None

Steps

1. On the application menu bar, click File and select Switch Responsibility.

    The Responsibilities window opens.

2. Scroll to select Application Developer and click **OK**.

    The Navigator - Application Developer window opens.

3. In the Functions tab, double-click Application to expand the node.

4. Double-click Lookups to expand the node.

5. Select Common and click **Open**.

    The Application Utilities Lookups window opens.

6. On the application menu bar, click View, point to Query by Example, and click Enter.

7. In the Type field, enter **JTF_NOTE_TYPE**.

8. On the application menu bar, click View, point to Query by Example, and click Run.

   The application populates the window with existing type code information.

9. Scroll down and select the last record in the multi-record block.

10. Define and enter the code, meaning, description, and effective dates.

11. Save your record.

    The new note type registers in the list of values for the note type field in the application.

Guidelines

Choose to enable note types by selecting Enabled for the corresponding note type row. Initially you can create the complete set of note types, and enable the specific types as desired.

Mapping Note Types To a Source

When you may map a note type to a source object, you limit the visible note types for that source to the defined subset of note types. Perform the following steps to map note types to source code.

Prerequisite

You must log on under the CRM Administrator account to perform this task.

Steps

1. Select CRM Administrator from the list of logon responsibilities.

   The CRM Administrator Navigator opens.

2. Expand the Notes Setup node.

3. Select Source and Note Type Mapping.

   The Source to Type Mappings form window opens.

4. Select a source to map from the Source list of values.

5. Select a note type to map to it from the Note Type list of values.

6. Save this record when you have finished.

Setting Up the Source Object Code and Context

Oracle Notes provides predefined documents or source objects. When you define a new document, you must associate Notes usage to the new document. On the Notes form, the document name appears in the Source list. Each item in the Source list has an associated context, which appears in the Related To list.

Perform the following steps to define the source code usage as NOTES.

Prerequisite

You must log on under the CRM Administrator account to perform this task.

Steps

1. Select CRM Administrator from the list of logon responsibilities.

   The CRM Administrator Navigator opens.

2. Expand the Task and Escalation Manager node.

3. Expand the Setup node.

4. Double-click Objects Meta-data.

   The Tasks Setup: Object Type form window opens.

5. Perform one of the following tasks:

   a. If the source object code you want to seed already exists, then define the usage as NOTES.

   b. If the source object code is not defined, then you must define the source object code, the name, and select its details and usage. (Usage should be NOTES.)

6. Save this record when you have finished.

System Profile Options

Use the following list to identify the profile option(s) that you need to set for your specific implementation. You can set these profile options in any order you like.

■   Notes: Default Note Status

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option Notes: Default Note Status

Sets the default note status.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X	X	X	X
Setting	**Description and Usage Considerations**					
User chosen	Chose the default note status from the provided list of values.					

Implementing Oracle Calendar

This topic group provides general descriptions of the set up and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*

- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*

- *Oracle CRM Foundation Components Concepts and Procedures*

- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
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Related Documentation

Document	Purpose
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11*i* Overview of CRM Foundation, Course Description ID 8831.

System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these options in any sequence.

- JTF_CAL_ACCESS_ALL_CALENDARS

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option JTF_CAL_ACCESS_ALL_CALENDARS

Set to provide access to other Resources' calendars.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Responsibility**	**Application**	**Site**
X	X	X	X	X	X	X
Setting	**Description and Usage Considerations**					
Y/N	Default is No.					

Defining a Calendar

See the following procedures for defining and maintaining calendars:

- Defining the Calendar

- Defining Availability (of resources)
- Defining Non-availability
- Assigning a Resource to a Calendar
- Assigning a Calendar to a Shift
- Assigning a Calendar to an Exception
- Viewing the Datebook

Implementing Task Manager

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Dependencies for Tasks

The following Foundation modules must be implemented before implementing Oracle Tasks:

- Resource Manager

- Territory Manager

- Calendar

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*

- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*

- *Oracle CRM Foundation Components Concepts and Procedures*

- *Oracle CRM Foundation Technical Reference Manual*

- *Oracle Workflow Guide*

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Setting Up Oracle Tasks

Oracle Tasks comes ready to use out-of-the-box, with a number of functions pre-defined for you. However, if desired, you can easily customize Oracle Tasks to meet your business needs.

Prerequisites

First install Oracle Tasks.

Steps

Perform the following tasks to customize Oracle Tasks for your specific needs.

Step	Required?	Action	Window Name(s)
1	Optional	Create new Task Statuses if you want to customize task statuses. See Defining Task Status for details.	Define Task Status
2	Optional	Create new Task Priorities if you want to customize task priorities. See Determining Task Priority for details.	Define Task Priorities

Step	Required?	Action	Window Name(s)
3	Optional	Create new Task Types if you want to customize task types.	Define Task Types
		See Defining a Task Type for details.	
4	Optional	Use the status transition model to restrict the status assigned to a task depending on the responsibility.	Define Task Statuses, click **Define Transition**
		Set up the state transition model for each responsibility.	
5	Optional	Create new task date types.	Define Date Types
		The task data model provides three pre-defined date types:	
		■ Planned	
		■ Scheduled	
		■ Actual	
		However, depending on the usage, additional dates can be required.	
		For example, if a lead requires a follow-up date, you might set up a Follow-up Date type.	
6	Optional	Use templates if the same set of tasks are created repeatedly.	Define Templates
		See Designing Task Templates for details.	

Defining Task Status

Limit the user's choices of task status by defining the list of status options and determining the employee type that has access to each status type. When you provide a list of values for the Task Status field, task creators choose from a pre-defined template of status options. Use this procedure to define types of task status for your users.

Prerequisites

None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.

2. In the Task Manager Navigator, double-click Setup to expand the node.

3. Select Task Status and click **Open**.

   The Task Status window opens.

4. Define a type name and enter it in the Status field.

5. Enter a brief description of the status type in the Description field.

6. Enter the effective dates in the From and To fields.

7. Select task status flags.

   For a detailed description of flag options, see the Task Status Flag Definitions table in the References section.

8. Optionally, define transition values that determine the user privilege for each status type.

   Use this procedure to define transition values.

   a. Click **State Transition**.

      The State Transition window opens.

   b. In the Rules tab, enter a name for the user privilege relationship in the Rule Name field.

   c. Enter an initial and final status type for the user.

      Use the initial and final status values to determine the user's range for selecting task status.

   d. In the Responsibility tab, enter the pre-determined rule name.

   e. Enter a user type in Responsibility Name field and click **OK**.

      A transition value stipulating user status privilege now exists.

9. Save your task status type.

   The new task status and corresponding privileges register as lists of values for their fields in the application.

References

Task Status Flag Definitions

Flag	Definition
Assigned	Assigned to an individual
Working	In progress
Schedulable	Scheduled or re-schedulable
Accepted	Accepted by owner
Rejected	Rejected by owner
On Hold	Temporarily not active
Approved	Approved by management
Completed	Completed by owner
Cancelled	Cancelled by owner, creator, or management
Delete Allowed	Delete acceptable without cancellation
Closed	Completed and closed
Seeded	Pre-defined task status

See also

Defining a Status Transition and Assigning Rules

Determining Task Priority

Determine task priority by choosing terms for varying levels of priority and setting an importance rating that corresponds with each term. Use this procedure to determine task priority for your users.

Prerequisites

None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.

2. In the Task Manager Navigator, double-click Setup to expand the node.

3. Select Task Priority and click **OK**.

The Task Priority window opens.

4. Define a name and enter it in the Priority field.

5. Enter a numerical value in the Importance field.

    Choose an importance value from a larger defined scale of priority.

6. Enter a brief description of the priority value.

7. Enter the effective dates in the From and To fields.

8. Select Seeded to restrict the edit of task priority from future users.

9. Save your task type.

    The new task priority registers as a lists of value for the Priority field in the application.

Defining Task Types

You can configure Task Manager to limit the user's selection of task types. When you provide a list of values for the Task Type field, the task creators cannot enter an incorrect value. Instead they choose from a pre-defined menu of task options. Use this procedure to define task types.

Prerequisites

None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.

2. In the Task Manager Navigator, double-click Setup to expand the node.

3. Select Task Types and click **OK**.

    The Task Types window opens.

4. Define a name and enter it in the Type field.

5. Select from the list of values in the Workflow field.

    The corresponding workflow path information populates the Task Workflow and Description fields.

6. Enter the effective dates in the From and To fields.

7. Enter a unit of measurement for effort in the UOM field.

Use a measure of time to determine the UOM value.

8. Enter a number for the quantity of effort in the Qty field.

9. Select task type flags.

   For a detailed description of flag options, see the Task Type Flag Definitions table in the References section.

10. If you want to define resource requirements from the Task Types window, then use this procedure.

    a. Click **Resource Requirement**.

       The Resource Requirements window opens.

    b. Enter a resource name in the Name field.

    c. Enter a number in the Required Units field.

       Selecting the Enabled Flag activates the resource type for the corresponding task type.

    d. Click **OK**.

       The complete set of resource types now exists and register as lists of values for their task types when enabled.

11. Save your task type.

    The new task type and corresponding resource types register as lists of values for their fields in the application.

References

Task Type Flag Definitions

Flag	Definition/Action
Notification	Launch notification workflow automatically.
Schedulable	Reserve the resource via the Scheduler.
Billable	Signify a task as a service that requires billing.
Private	Restrict task availability.
Seeded	Lock edit of task type from future users.

Defining a Status Transition and Assigning Rules

In Oracle Tasks, you can define a group of tasks that must be performed and impose a sequence of statuses to the tasks. A status transition is the imposed sequence of statuses.

For example, one status transition may dictate the following status sequence:

- Open
- Assigned
- Working
- Closed

As each status in the sequence is completed, the subsequent status appears on the agent's list.

In addition, you can define rules for each status transition. A status transition rule defines access and read-write privileges for the status transition. Rules can be associated to responsibilities, so that a manager may have more privileges than an agent.

Use the following procedure to define a status transition and assign it to a responsibility.

Prerequisites

Responsibilities must be created for the applications to which you are assigning Task Status and Task Status Transitions.

Steps

1. Login to the CRM Administrator responsibility.

2. Navigate to **Task Manager > Setup > Task Status**.

   The Task Status window opens.

3. Click **Define Transition**.

   The Status Transition window opens.

4. Click the Rules tab and click the Rule Name field.

5. Select **View > Find All** to populate the Rules tab.

The Rules tab displays two lists: Current State and Next State. On any line, the task in the Next State list defines the task that immediately follows the task in the Current State list. Use this window to define the sequence of tasks in a rule.

6. To define a new rule, enter a value in the Rule Name field.

7. Click the Responsibilities tab to assign a Rule to a Responsibility.

8. Click **OK** to complete the association of rule to responsibility.

Designing Task Templates

Design a task template to assist the application user in creating tasks. Creating a template eliminates the user's interaction with the specific properties of a task and makes task creation a simple and quick process when creating redundant task types. Use this procedure to design task templates.

Prerequisites
None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.

2. In the Task Manager Navigator, double-click Tasks to expand the node.

3. Select Task Template Group and click **OK**.

   The Task Template Group window opens.

4. Define and enter a template group name, description and effective dates.

5. Enter a document type by selecting from the list of values.

6. Define and enter a template name, number, and description.

7. Select from the list of values in the Type, Status, and Priority fields.

8. Activate alarm and notification functions, and enter duration and planned effort values.

9. Select flags.

10. Optionally, click **Dependencies** and **Recurrences**.

    The Task Details window opens.

11. Save your template.

A task template now exists and task creation from a template is possible.

Guidelines

Create task templates within groups. Each task template group contains related task templates with full property descriptions.

References

Linking Tasks to Source Documentation

Defining Task Type

Defining Task Status

Determining Task Priority

Setting Task Flags

Setting Dependencies for Tasks

Assigning and Scheduling Resources

Creating and Updating Tasks

Creating and Using Task Folders

This topic marker is obsolete.

System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these profile options in any order you like.

- JTF_TASK_DEFAULT_TASK_TYPE

- JTF_TASK_DEFAUT_TASK_STATUS

- JTF_TASK_DEFAULT_TASK_PRIORITY

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option JTF_TASK_DEFAULT_TASK_TYPE

Sets the default task type.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Resp**	**App**	**Site**
X	X	X				

Profile Option JTF_TASK_DEFAUT_TASK_STATUS

Sets the default task status.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Resp**	**App**	**Site**
X	X	X				

Profile Option JTF_TASK_DEFAULT_TASK_PRIORITY

Sets the default task priority.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Resp**	**App**	**Site**
X	X	X				

Workflows

Oracle Tasks contains one pre-defined workflow:

- JTFTASK

This workflow is automatically launched under the following circumstances.

- If the auto-notification flag for the task type is set to Y (Yes).
- If certain pre-defined conditions are met.

Implementing Oracle Interaction History

This topic group provides general descriptions of the set up and configuration tasks required to implement the application successfully.

Release Dependencies

Before Oracle Interaction History is installed, these items must be installed and stable:

- Oracle CRM Foundation (JTF) Resource
- JTF Tasks
- Oracle Accounts Receivable/Technical Community Architecture (AR/TCA) Customer Model
- Oracle Automated Marketing Services (AMS) Campaigns

Implementation of Oracle Interaction History starts with:

- The graphical user interface, either Forms or JSP versions
- Interaction History Administration, either Forms or JSP versions, or public APIs

Oracle Interaction History interacts with JTF Resource; JTF Tasks; AR/TCA Customer Model; AMS Campaigns.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*

- *Oracle CRM Foundation Components Concepts and Procedures*

- *Oracle CRM Foundation Technical Reference Manual*

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Related Courseware

The following Net Class is available on demand through Oracle University.

- 11*i* Overview of CRM Foundation, Course Description ID 8831.

Setting Up Oracle Interaction History

Overview

Interaction History is a collection of tables and business logic that records touch points between customers and resources for Oracle Applications. Whether the touch point occurs between two computers, a face-to-face conversation, or over various media channels (such as telephony), the following patterns are true:

- A touch point is recorded as an interaction

- An interaction is composed of a set of one or more business activities

- An interaction is historical record, once created it cannot be altered or modified

- Business activities can be related to a media item (such as phone, e-mail, or fax)

Prerequisites

Interaction History is part of the Oracle CRM Foundation product suite. After CRM Foundation is installed, clients can access the Interaction History graphical interface, Administration, and public APIs to test and use Interaction History functionality.

Steps

Step Number	Required?	Oracle Interaction History Setup Step Description	Window Name(s)	AIW Reference
1	Optional	Define additional Outcome Codes required by the application in addition to the initial seeded values. Modify or delete existing Outcome Codes.	Outcomes Tab	CRM Administrator Interaction History Administrator
2	Optional	Define additional Result Codes required by the application in addition to the initial seeded values. Modify or delete existing Result codes.	Result Tab	CRM Administrator Interaction History Administrator
3	Optional	Define additional Reason Codes required by the application in addition to the initial seeded values. Modify or delete existing Reason Codes	Reason Tab	CRM Administrator Interaction History Administrator
4	Optional	Define additional Action Item Codes required by the application in addition to the initial seeded values. Modify or delete existing Action Item Codes.	Action Item Tab	CRM Administrator Interaction History Administrator
5	Optional	Define additional Action Codes required by the application in addition to the initial seeded values. Modify or delete existing Action codes.	Action Tab	CRM Administrator Interaction History Administrator
6	Optional	Define the Outcome, Result, and/or Reason codes as required for specific campaigns and promotions.	Wrap Up Tab	CRM Administrator Interaction History Administrator
7	Optional	Define unique pairs of Outcome-Results from existing Codes in the Outcome and Result tables.	Outcome Results	CRM Administrator Interaction History Administrator
8	Optional	Define unique pairs of Result-Reason from existing Codes in the Result and Reason tables.	Result Reasons	CRM Administrator Interaction History Administrator

Guidelines

All applications that have a touch point between a customer and resource must record this event as an interaction via Oracle Interaction History or another application serving as a proxy that uses Interaction History (for example, Universal Work Queue). Interaction History records can be browsed and retrieved by directly using its graphical interface, integrating its graphical interface into an application, or using its views. Use the Administration tool to modify setup data; do not modify Interaction History tables directly.

Browsing and retrieval of interactions can be integrated by invoking the Interaction History graphical interface directly from an application, integrating the Interaction History graphical interface into an application, or using Interaction History views and displaying the results as needed by the application.

Upon initiating a touch point, an interaction is created to serve as a repository for a set of business activities that will occur during the lifetime of the touch point. When a business activity is initiated, it is added to the interaction. After all business activities for the interaction are completed the interaction is closed, making it a historical record. Interactions can be browsed and retrieved during future active touch points or for business intelligence analysis. Media items associated with a business activity of an interaction are created before the interaction.

Concerns

Oracle Interaction History does not have any organizational constraints on operations or relationships. Oracle Interaction History does not have any multi-organizational tables.

Oracle Interaction History schema does not contain any table columns that are related to currency. Interaction History does have five translated tables which are used by applications for creating interactions and activities: JTF_IH_OUTCOMES; JTF_IH_RESULTS; JTF_IH_REASONS; JTF_IH_ACTION_ITEMS; JTF_IH_ACTIONS.

Troubleshooting Implementation of Oracle Interaction History

The following problems may result in incorrect behavior for Interaction History:

- **Cannot create an interaction** – mandatory parameters that must be validated. To create an interaction, a valid party_id (customer), resource_id (agent), outcome_id, and handler_id (application) are required. If any of these parameters are invalid or missing, the create interaction APIs will fail.

- **Cannot create an interaction** – optional parameters that must be validated. To create an interaction, the following optional parameters must be valid: result_id, reason_id, and campaign.

- **Cannot create an activity** – mandatory parameters that must be validated. To create an activity, a valid interaction_id, action_item (business activity type) and outcome_id are required. If any of these parameters are invalid or missing, the create activity APIs will fail.

- **Cannot create an activity** – optional parameters that must be validated. To create an activity, the following optional parameters must be valid: result_id, reason_id, action_id (sub-level detail related to business activity), media_id, task_id, cust_account_id, and campaign.

- **Cannot create a media item** – mandatory parameters that must be validated. To create a media item, a valid media item type and media data are required. If any of these parameters are invalid or missing, the create interaction APIs will fail.

- **Cannot create an interaction, activity, or media item** – failure to load mandatory parameter seed data.
  It is impossible to create an interaction if one of the following tables does not cannot seed data: outcomes and action items. These parameters must be validated.

- **Cannot create an interaction, activity, or media item** – failure to load optional parameter seed data. It is impossible to create an interaction if one of the following tables does not cannot seed data: results, reasons, and actions. It these parameters are set, then they must be validated.

References

Oracle CRM Foundation Components - Interaction History High-Level Design Document

Oracle CRM Foundation Components - Concepts and Procedures, Release 11*i*, April 2000, Part No. A83642-01

Setting Profile Options

Oracle Interaction History does not use profiles.

Workflows in Oracle Interaction History

Oracle Interaction History does not use workflows.

Implementing Oracle 1-to-1 Fulfillment

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Release Dependencies

Before Oracle 1-to-1 Fulfillment is installed, these items must be installed and stable:

- Oracle CRM Foundation HTML Stack
- Oracle Interaction History
- Oracle Marketing Encyclopedia Foundation Component (MES)

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Oracle Workflow Guide*

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Setting Up Oracle 1-to-1 Fulfillment

The Oracle Foundation HTML Stack provides the interface for Oracle 1-to-1 Fulfillment administration.

Following is an overview of the basic steps for setting up 1-to- 1 Fulfillment.

Step	Required?	Description	Navigation Path
1	Yes	Creating an administrative user.	
		▪ Assign the JTF_FM_Admin role to the application administrator user.	▪ System Administrator: Security > User
		▪ Assign the JTF_FM_Administrator responsibility to the same user.	▪ System Administrator: Security > User > Define
2	Yes	Identify the agents and the output devices you will use with Oracle 1-to-1 Fulfillment.	N/A
3	Yes	Define the Oracle 1-to-1 Fulfillment server(s).	▪ Fulfillment Administrator: Server
4	Yes	Define the resource groups for each output device and assign groups to servers.	▪ Fulfillment Administrator: Groups
5	Yes	Create and upload Master document(s).	▪ Fulfillment Administrator: Master Document > Upload
6	No	Associate a Master document with template.	▪ Fulfillment Administrator: > Template > Master Document
7	Yes	Set up and start the Fulfillment server.	Oracle Applications

Assigning the JTF_FM_ADMIN Role to the Administrator

The JTF_FM_ADMIN role for the Oracle 1-to-1 Fulfillment administrator has been pre-defined. Use the following procedure to assign the role to the appropriate user.

> **Note:** An End user is an individual that is not representing an organization.
>
> A Business user is an individual that is representing an organization.

Prerequisites

The Oracle 1-to-1 Fulfillment administrator must be defined as a user and have a password. The administrator must have the JTF_FM_ADMINISTRATOR responsibility assignment.

Steps

1. Use the HTML environment to login as sysadmin.

2. In the System Administrator Console, select the Users tab and click **Add**.

3. In the User Registration screen, fill in the user information and click **Submit**.

4. In the System Administrator Console, select the Users tab.

5. Enter the Last Name of the Oracle 1-to-1 Fulfillment administrator in the Search field and click **Go!**

6. Click the user name to open the User Details window for that user.

7. Click **Roles** to open the User-Role Mapping window.

   The Role Mapping window displays two lists: Available Roles and Assigned Roles.

8. Select the JTF_ADMIN role from the Available Roles list and click **>** to move it to the Assigned Roles list.

9. Click Update to complete the task of assigning the Administrator role to the Oracle 1-to-1 Fulfillment administrator.

Assigning the JTF_FM_Administrator Responsibility to the Application Administrator

When Oracle CRM Applications are first installed, the sysadmin user is the only defined user. The JTF_FM_Administrator responsibility has been predefined. You must assign this responsibility to the user who is the administrator for Oracle 1-to-1 Fulfillment. Use this procedure to assign the JTF_FM_Administrator responsibility to the appropriate user.

> **Note:** To find the value of the **responsibility_id** for the jtf_fm_administrator key in your database, execute the following SQLPLUS command:
>
> SELECT RESPONSIBILITY_ID FROM FND_RESPONSIBILITY WHERE RESPONSIBILITY_KEY = 'JTF_FM_ADMINISTRATOR';
>
> To find the value of the **application_id** for JTF in your database, execute the following SQLPLUS command:
>
> SELECT APPLICATION_ID FROM FND_APPLICATION WHERE APPLICATION_NAME = 'JTF';

Prerequisites

The Oracle 1-to-1 Fulfillment administrator user must be a registered user with a password. See Assigning the JTF_Admin Role to the Administrator.

Execute SQLPLUS commands to determine two values in your database: responsibility_id for the jtf_fm_administrator key, and application_id for JTF.

Steps

1. Use Oracle Forms to login as the System Administrator and navigate to **Security > User > Define**.

2. Enter the Oracle 1-to-1 Fulfillment administrator's user ID in the User Name field.

3. Enter the Oracle 1-to-1 Fulfillment administrator's password in the Password field.

4. Choose JTF_FM_ADMINISTRATOR from the Responsibility list of values.

5. Select **File > Save and Proceed**, then close this window.

6. In the System Administrator window, navigate to **Profile > System**.

7. In the Find System Profiles window, select the User box and enter the Oracle 1-to-1 Fulfillment administrator's user name.

8. In the Profile field, enter JTF% and click **Find**.

   The System Profile Values window displays all the profiles that begin with JTF. The Oracle 1-to-1 Fulfillment administrator's user name appears at the top of the User column on the right.

9. Modify the following profiles by entering values in the User column:

   - JTF_PROFILE_DEFAULT_APPLICATION: enter the value of the application_id used in your database

   - JTF_PROFILE_DEFAULT_RESPONSIBILITY: enter the value of the responsibility_id used in your database

   - JTF_PROFILE_DEFAULT_LANG: enter US

10. Select **File > Save and Proceed** and return to the Find System Profiles window.

11. In the Profile list of values, enter ICX% and click **Find**.

12. Select ICX: LANGUAGE and set the language to your language.

13. Select **File > Save.**

    The Oracle 1-to-1 Fulfillment administrator now has been assigned the appropriate responsibility.

Define and Configure the Fulfillment Server

The fulfillment server calls on database tables to supply the fulfillment collateral, and sends the collateral to specified output devices. You need to configure the fulfillment server with specific output devices and associate the output devices with specific agent groups.

When creating a new fulfillment server, you can follow the procedures that are listed on the screen in the Servers column. The procedures are listed in sequence, from top to bottom.

You must define the Time format as *yyyy-MM-dd HH:mm:ss.S*, where:

- yyyy is the year in four digits

- MM is the month in two digits (06)

- dd is the day in two digits (04)

(Enter a space between dd and HH)

- HH is the hour, in two digits (from 01–24)

- mm is the minutes in two digits

- ss is the seconds in two digits

- S is milliseconds in one digit

Prerequisites

None

Steps

1. In Oracle 1-to-1 Fulfillment, choose the Server tab.

    The Server screen opens.

2. Choose the **Create** button.

    The General screen opens.

3. Enter the **Server Name** and other information as necessary.

    - In **Start Time**, enter the current date and the time of day that 1-to-1 Fulfillment should begin operations. The Start time should occur after the date and time that the server is created.

    - In **Shut Down Time**, enter a date and the time of day that 1-to-1 Fulfillment should end operations.

    - The Description is optional.

4. Click **Continue**.

See Also

- Configuring E-mail Servers
- Configuring File Servers

Defining Resource Groups and Assigning Groups to Servers

A resource group is a group of people. Each resource group must be assigned to a Oracle 1-to-1 Fulfillment server. Use the following procedure to define a group and assign it to a server.

Prerequisites

A Oracle 1-to-1 Fulfillment server must be defined and configured. Agents must be registered users.

Steps

1. In the 1-to-1Fulfillment Administrator Console, choose the Server tab and then click **Groups** > **Create**.

    The Create Group window displays the fields you need to create a resource group.

2. Enter the Group Name and Description. Select the appropriate Server from the list.

3. In the list of Agents, click **Go** to begin a search of Agents.

    The Select Agent window.

4. In the Select Agent window, enter the initial letter of the agent's name with % and click **Search**.

5. Click the agent name to add the agent to the group. Repeat steps 3 and 4 for each of the agents you want to include in the group.

6. When the list of agents is complete, click **Create**.

Configuring E-mail Servers

The second step in configuring the fulfillment server is to associate the e-mail servers with the fulfillment server.

Prerequisites

You must have already created the server. To begin, see Creating a New Fulfillment Server.

Steps

1. In the E-mail Servers screen, choose the **Add** button to add a new e-mail server.

    The Create E-mail Server window opens.

2. In the fields on the Create E-mail Server window, enter the information required to describe the e-mail server that you are adding. In the Incoming and Outgoing server fields, enter the IMAP or SMPT server names.

3. Choose **Save**.

The E-mail Servers window appears.

4. To add more E-mail servers, repeat steps 1, 2 and 3.

Configuring Fax Servers

WARNING: Screens relating to fax functionality or capability are not supported at this time, and should not be used.

Configuring File Servers

WARNING: Screens relating to file server functionality or capability are not supported at this time, and should not be used.

Configuring Printers

WARNING: Screens relating to print functionality or capability are not supported at this time, and should not be used.

Creating Groups for Servers

The last step in configuring the fulfillment server is to associate agent groups with the fulfillment server, and associate output devices with the groups. By associating a group to an output device, you indicate that the group will use that device. You must create an association for each agent group to each output device for which the group needs access. Use this procedure to associate an agent group to one or more output devices.

> **Note:** When a group is associated to a fulfillment server, that server's file server is automatically available for the group. You do not need to associate a file server to a group or its agents.

Prerequisites

You must have already created the fulfillment server. See Define and Configure the Fulfillment Servers.

Steps

1. To add a group, in the Groups screen, choose the **Add** button.

   The Select Group screen opens.

2. From the Group Name drop-down list, choose a group to associate with the fulfillment server.

3. Choose **Go**.

   The Output Devices screen opens to display a list of output device types. You must create an association with each output device to which the group needs access.

4. From the list of values for one type of output device, choose one or more devices that you want to associate to the group.

5. Click **Create** to create the association. Or click **Clear** to clear associations that you have selected but have not yet created.

6. Repeat step 5 and 6 for each type of output device you want to associate to the group.

7. Click **Save** to complete the association of the group to output devices.

See also

Creating New Groups

 Adding Agents to a Group

Creating a New Template

A template is a pre-defined package of brochures, newsletters, or other customer-oriented information that an agent can direct to customers in response to a fulfillment request. Text found in a template is associated to one or more master

documents. For more information on templates and how to use them, see Understanding Fulfillment Templates.

To create a new template, use the following procedure.

Prerequisites

You must first create Master documents and upload them. Collateral must already be stored in the database.

Steps

1. Choose the Template tab and then choose **Create**.

    The General screen opens.

2. Enter a **Template Name**.

3. In the Status drop-down list, choose either:

    - **Active** to make the template available to requests.

    - **Inactive** to make the template unavailable to requests.

4. Optionally, in the Description field you may enter a description of the template.

5. Click **Save**.

    The Template Master Document screen opens.

Adding a Master Document to a Template

To add a master document to a template, use the following procedure.

Prerequisites

The template must already exist. See Creating a New Template.

Steps

1. Choose the Template tab.

    The View Template screen opens.

2. Choose the name of the template that you want to add.

    The template details screen opens.

3. Choose the Master Document link in the left frame.

The View Template, Master Documents screen opens.

4. Choose **Go** to add more master documents.

5. Choose **Update** to save.

Inserting Collateral into a Template

To add collateral to a template, use the following procedure.

Prerequisites

None

Steps

1. Choose the Template tab.

   The View Template screen opens.

2. Choose the name of the template that you want to update.

   The template details screen opens.

3. Choose the Collateral link in the left frame.

   The View Template, Collateral screen opens.

4. Choose **Go** to add more collateral.

5. Choose **Update** to save.

Setting Up and Starting the Fulfillment Server

Use the following procedure to set up the server.

> **Note:** Perform the following procedure in either a UNIX or Windows-NT environment.

Prerequisites

You must be able to log on to the System Administration Console as JTF_FM_ADMIN, or in a similar role, to perform the following steps.

For details on this account, see Assigning the JTF_FM_ADMIN Role to the Administrator, and Assigning the JTF_FM_Administrator Responsibility to the Application Administrator.

Steps for creating a Fulfillment server using the SysAdmin Console

1. Log on the System Administration Console as an administrative user. (For example, log on as JTF_FM_ADMIN.)

2. Navigate to the Server tab, and create a new fulfillment server.

3. Note the ID number of the server.

   This number is needed in the start-up script for the server. Usually, the first time a server is created, it's ID is 10000. After that, it increments by one with each new server.

4. Create an e-mail server to associate with the fulfillment server that you created in step 3.

   This is an e-mail server associate-mailted with the fulfillment server, not any other e-mail server. This e-mail server will need to have the outgoing e-mail server set.

   For many UNIX environments, you simply need to give the name of the UNIX box that is to run the fulfillment server. For example, this could be similar to AP102SES.COMPANY.COM.

5. In the Group tab, create a group and associate a fulfillment server to that group. (This should preferably be the same one that you just created.)

6. Assign a user to that group.

   Note the ID of the user, since you may be submitting requests with that user.

7. Return to the Server tab and find the server that you created in step 2.

8. Double click the server name to open the general information screen.

9. Select Groups at the left hand side of the screen.

   The Select Group screen opens.

10. Associate the group you created with this server, and select **Go**.

    The Output Devices screen opens.

11. Associate an e-mail server with this server, and select **Create**.

12. Select **Save**.

13. Select the Template tab, then the Master document subtab, then select **Upload**.

14. Follow the upload steps to upload master documents to the server.

Steps for setting up the shell or batch script

1. Modify the classpath so that it points to both apps.zip and 3rdparty.zip

2. Create a simple batch file, or UNIX shell script, from which the server can be configured and executed.

Here is a batch file example:

```
java-ms32m-mx64m-nojit (for UNIX shell script, add exec to the beginning of the
                                 line)
-Dengine.OutputDir=output
-Dengine.CommandPromptEnabled=true
-Dengine.ServerID=999
-Dengine.AOLJ.config= <path>\jtf.dbc
oracle.apps.jtf.fm.engine.processor.Processor
```

Parameters

- `engine.OutputDir` is the output directory to be used by the Fulfillment Dispatcher. Early versions of Fulfillment Server may not have this feature.

- `engine.CommandPromptEnabled` must be set to true if you want to interact with the Fulfillment Server via the command prompt.

- `engine.ServerID` specifies the ID of the server.

- `engine.AOLJ.config` is the location of the 'jtf.dbc' file that the server needs to be able to communicate with the database.

- `engine.refreshrate` (optional) is the number of milliseconds between the status checks that the processor performs.

3. Execute the batch file or UNIX shell script to start the fulfillment server.

Guidelines: Use the following Fulfillment server commands:

- `stat` – Prints statistics on the current state of the fulfillment processor

- `stop` – Stops the fulfillment processor

Testing Your Setup

Test your server setup by submitting a request and verifying that it shows up as successful in the logs.

System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these profile options in any order you like.

- JTF_FM_TEMP_DIR
- JTF_FM_OUT_DIR
- JTF_FM_EVENTS_LOG
- JTF_FM_ERROR_LOG
- JTF_FM_LOG_LEVEL
- JTF_FM_NUM_PROCESSES
- JTF_FM_MIN_PROCESSES
- JTF_FM_MAX_PROCESSES
- JTF_FM_PROCESS_IDLE
- JTF_FM_MAX_PROCESS_IDLE
- JTF_FM_REFRESH_RATE

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option JTF_FM_TEMP_DIR

Sets the temporary directory for the fulfillment engine. (This is not a full path.)

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_OUT_DIR

Sets the output directory for the fulfillment engine.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_EVENTS_LOG

Sets the events log name for the fulfillment engine.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_ERROR_LOG

Sets the error log name for the fulfillment engine.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_LOG_LEVEL

Sets the level of logging detail.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_NUM_PROCESSES

Sets the number of engine processes at the start up of the fulfillment engine.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_MIN_PROCESSES

Sets the minimum number of processes available at any given time in the fulfillment engine.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_MAX_PROCESSES

Sets the maximum number of processes available at any given time in the fulfillment engine.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_PROCESS_IDLE

The number of milliseconds a process is allowed to remain idle before the processor starts reducing to the minimum.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_MAX_PROCESS_IDLE

The number of milliseconds a process is allowed to remain idle before needing a refresh.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_REFRESH_RATE

Description of profile option.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Implementing Assignment Manager

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*

- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*

- *Oracle CRM Foundation Components Concepts and Procedures*

- *Oracle CRM Foundation Technical Reference Manual*

- *Oracle Workflow Guide*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process

Document	Purpose
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11i Overview of CRM Foundation, Course Description ID 8831.

Setting System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these options in any sequence.

- ACTIVATE_AUTO_SELECT
- ACTIVATE_CONTRACTS_PREFERRED_ENGINEERS
- ACTIVATE_IB_PREFERRED_ENGINEERS
- ACTIVATE_WORKFLOW_NAME

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option ACTIVATE_AUTO_SELECT

Set to activate the auto-selection of resources by the Assignment Manger engine.

The Assignment Manager engine uses this profile option setting to determine whether the user needs to make a selection from the provided list of resources, or if this task is performed automatically by the Assignment Manager engine itself.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X	X	X	X

Setting	Description and Usage Considerations
Y/N	Default is Yes.

Profile Option ACTIVATE_CONTRACTS_PREFERRED_ENGINEERS

Set to retrieve the preferred resource information from the Contracts module.

The Assignment Manager engine uses this profile option setting to determine whether the Contracts Preferred Engineers are picked automatically by the Assignment Manager engine or not.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X	X	X	X
Setting	Description and Usage Considerations					
Y/N	Default is No.					

Profile Option ACTIVATE_IB_PREFERRED_ENGINEERS

Set to retrieve the preferred resource information from the Installed Base module.

The Assignment Manager engine uses this profile option setting to determine whether the Installed Base Preferred Engineers are picked automatically by the Assignment Manager engine or not.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X	X	X	X
Setting	Description and Usage Considerations					
Y/N	Default is No.					

Profile Option ACTIVATE_WORKFLOW_NAME

Set to a user-defined workflow procedure name.

This workflow procedure is user-programmed code for further filtering the resources. The Assignment Manager engine retrieves the procedure name from this profile option and uses it to process the user's request.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X	X	X	X

Setting	Description and Usage Considerations
None	The name of a user-defined procedure.
	There is no default. This is a user-defined procedure; it may or may not exist.

Implementing Escalation Management

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*

- *Installing Oracle Applications, Release 11i*

- *Implementing CRM Applications*

- *Oracle CRM Foundation Components, Concepts and Procedures*

- *Oracle CRM Foundation Technical Reference Manual*

- *Oracle Workflow Guide*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process

Related Documentation

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Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
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Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11*i* Overview of CRM Foundation, Course Description ID 8831.

Setting Up Escalation Management

The Escalation Manager provides two types of escalation management:

- Reactive, or activity in response to a customer behavior

- Proactive, or an automated response to a violation of business rules

A Workflow process controls the Business Rule Monitor, which in turn periodically checks the business rules that have been defined. The user that owns this Workflow process receives notifications when the process starts and stops, and also when errors are detected. The user must be defined to ensure that an owner of the Workflow process exists and that the notifications can be sent successfully. This user is typically the System Administrator.

Escalation Management provides pre-defined business rules. You may design your own rules that have been customized for your enterprise.

Escalation Implementation Steps

Step	Required?	Steps to Implement Escalation Manager
1	Yes	Setting the system profile options
2	Yes	Setting the Escalation lookup codes
3	Yes	Starting the Escalation Manager workflow process
4	Optional	Defining new, customized escalation statuses
5	Optional	Defining new, customized escalation reference codes

Escalation Implementation Steps

Step	Required?	Steps to Implement Escalation Manager
6	Optional	Defining new, customized escalation reason codes

Setting System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these profile options in any order you like.

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Escalation Management Profile Settings

Profile Option	Value
Default Escalation Status	Opened
Default Escalation Level	Level 1
Default Escalation Reason	Slow Progress
Default Document Type	Service Request
Default Reference Type	Escalation
Default Contact Type	Customer
Default Contact Notify (Y/N) Checkbox	Notify Checked
Default Contact Point	Phone
Default New Note Type	General

Setting the Escalation Lookup Codes

Another required task in implementing the Escalation Manager is to set the following lookup codes:

- JTF_TASK_ESC_LEVEL

- JTF_TASK_REASON_CODE

- JTF_TASK_CONTACT_TYPE

- JTF_TASK_REFERENCE_CODES

Lookup Code JTF_TASK_ESC_LEVEL

This lookup code sets escalation levels.

Code	Meaning
DE	De-escalated
L1	Level 1
NE	Never escalated

Lookup Code JTF_TASK_REASON_CODE

This lookup code sets escalation reasons.

Code	Meaning
SLOW-PROG	Slow Progress
UNACCEPTABLE_SOLUTION	Unacceptable Solution
UNRES_OWN	Unresponsive owner
IMP_FAILING	Implementation failing

Lookup Code JTF_TASK_CONTACT_TYPE

This lookup code sets contract types.

Code	Meaning
CUST	Customer
EMP	Employee

Lookup Code JTF_TASK_REFERENCE_CODES

This lookup code sets reference codes for the task.

Code	Meaning
ESC	Escalation
FYI	For your information

Starting the Background Workflow Process

Start the workflow process listed in the following table to ensure proper operation of the Escalation Manager.

Escalation Management Workflow

Workflow Name	Description	User
JTFEC	Reactive Escalation Notification	Escalation Manager

Use the following procedure to start the required background process.

Prerequisites

None

Steps

1. In the System Administrator responsibility, navigate to **Requests > Run**.

    The Submit a New Request window opens.

2. Select Single Request and click **OK**.

3. In the Submit Requests window, type **W** in the Name field and press the Enter key on the keyboard.

    The Reports window opens and displays report names that begin with w.

4. Select Workflow Background Process and click **OK**.

    The Parameters window opens.

5. Type **re** in the Item Type field and press the Enter key on the keyboard.

    The Item Type window opens and displays items that begin with the letters "re."

6. Select Reactive Escalation Notification and click **OK**.

    Leave the Minimum Threshold and Maximum Threshold fields empty.

7. Enter **Yes** for both the Process Deferred and the Process Timeout fields and click **OK**.

    The Submit Request window appears in front.

8. Click **Schedule** on the Submit Request window.

    The Schedule window appears in front.

9. Select **Run the Job…Periodically**.

   More options appear for defining the time period.

10. Define the Start time and the End time.

   > **Warning:** Be sure to define an end time. When the end time field is blank, the process runs indefinitely and cannot be shut off.

11. In the Rerun Every fields, enter the number of minutes that defines the interval between job runs.

12. Select the From the Completion of the prior run box and click **OK**.

13. Repeat this entire procedure for each of the four workflow background processes

Guidelines

Set up Notifications in Oracle Workflow to ensure that notifications are sent to e-mail.

Setting Up Escalation Status

There are three pre-defined Escalation Statuses:

- Open
- Working
- Closed

You may add your own user-defined statuses to these available statuses. Use the following procedure to add user-defined statuses.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Task and Escalation Manager > Setup > Define Escalation Level**.

2. Enter a user-defined status in a blank field in the Status column.

3. Enter a brief description of the status type in the Description field.

4. Enter the effective dates in the From and To fields.

5. Select escalation status flags.

   For a detailed list of status flag options, see the Escalation Status Flag Definitions table in the References section of this procedure.

6. Click the Save icon to finish defining the Escalation status.

References

Escalation Status Flag Definitions

Flag	Definition
Assigned	Assigned to an individual
Working	In progress
Schedulable	Scheduled or re-schedulable
Accepted	Accepted by owner
Rejected	Rejected by owner
On Hold	Temporarily not active
Approved	Approved by management
Completed	Completed by owner
Cancelled	Cancelled by owner, creator, or management
Delete Allowed	Delete acceptable without cancellation
Closed	Completed and closed
Seeded	Pre-defined task status

Defining Escalation Reference Codes

A document or task may be combined with several other documents or tasks, such as when fulfilling a service request requires a series of tasks to be performed and related documents to be completed. In such a scenario, if one particular document or task needs to be escalated, the escalation might not apply to the other related items.

When you associate an Escalation Reference to the escalated item, you point to the other related items and indicate their relation. There are two pre-defined Escalation Reference types: FYI and Escalation.

- Use **FYI** (for your information) to indicate the task or document is related to the escalated item, but is not escalated.

- Use **Escalation** to indicate the task or document is related to the escalated item and also is escalated.

You can add other Escalation Reference types to customize your escalation references. Use the following procedure to define customized reference types.

Prerequisites
None

Steps
1. In the CRM Administrator responsibility, navigate to **Task and Escalation Manager > Setup > Define Reference Code**.

2. Enter the name of the new reference type in the first available row in the Code column.

3. Continue entering information in the remaining cells of the row to describe the escalation reference type and the effectivity dates.

4. Select the Enabled box to make the escalation reference type available.

5. Save the new Escalation Reference and close the form.

Defining Escalation Reason Codes

You can add other escalation Reason Codes to customize your escalation reasons. Use the following procedure to define customized reason types.

Prerequisites
None

Steps
1. In the CRM Administrator responsibility, navigate to **Task and Escalation Manager > Setup > Define Reason Code**.

   The Escalation Reasons Lookup window appears.

2. Select the first blank line.

3. Enter a code, meaning, and description.

4. Enter the effective dates in the From and To fields.

5. Select the Enabled flag.

6. Click the Save icon to finish defining the Escalation reason.

Implementing the Business Rule Monitor

This topic group provides general descriptions of the setup and configuration tasks required to implement the module successfully.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components, Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Oracle Workflow Guide*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process

Related Documentation

Document	Purpose
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11*i* Overview of CRM Foundation, Course Description ID 8831.

Setting Up The Business Rule Monitor

Oracle Escalation Manager provides two types of escalation management:

- Reactive, or activity in response to a customer behavior

- Proactive, or an automated response to a violation of business rules

A workflow process controls the Business Rule Monitor, which in turn periodically checks the business rules that have been defined. The user that owns this workflow process receives notifications when the process starts and stops, and also when errors are detected. This user must be defined to ensure that an owner of the workflow process exists and that the notifications can be sent successfully. Usually, the workflow owner is the system administrator.

The Business Rule Monitor provides pre-defined business rules. You may design your own rules that have been customized for your enterprise.

Step	Required?	Steps to Implement Escalation Manager
1	Yes	Define the owner of the workflow process.
2	Yes	Set the Business Rule Monitor system profile option.
3	Yes	Start the four background Business Rule Monitor workflow processes
4	Yes	Start the Business Rule Monitor.
5	Optional	Define new, customized business rules.

Step	Required?	Steps to Implement Escalation Manager
6	Yes	Verify that an Escalation Territory has been created and contains at least one resource

Defining the Owner of the Workflow Process

The owner of the workflow process is assigned to an existing user. This is typically the system administrator or the workflow administrator.

Prerequisites

The designated workflow owner must already exist in order to assign the workflow process. If no workflow owner exists, then the account must first be created.

Steps

1. In the System Administrator responsibility, navigate to **Security > User > Define**.

   The Users window opens.

2. Enter an existing user name in the Name field.

3. Enter a password in the Password field.

   Do not press Enter to move to the next field, you must move your cursor.

4. Select the following responsibility from the list of values (LOV) in the Responsibility field. This grants the responsibilities to the user.

   - Workflow Administrator

5. Select **File > Save**.

Setting System Profile Options

Use the following procedure to set the system profile option: Business Rule Monitor Workflow Administrator.

You can set these profile options in any order you like.

Prerequisites

None

Steps

1. In the System Administrator responsibility, navigate to **Profile > System**.

   The Find System Profile Values window opens.

2. Enter the following in the Profile field:

   ```
   Business Rule Monitor Workflow Administrator
   ```

3. Click **Find** to open the System Profile Values window.

4. Enter the name of the workflow administrator in the Site field.

   This user is the one that you previously named in Defining the Owner of the Workflow Process.

5. Select **File > Save**.

Starting the Background Workflow Processes

There are four predefined workflow item types. The first item type, JTFBRM, is internal to the Business Rule Monitor and has no user-defined attributes. The next three item types have specific attributes defined for each process. These attributes are maintained within the Business Rule Workbench, and can be viewed by clicking the button next to the workflow field.

Preseeded Workflow Processes

Item Types	Description
JTFBRM	Business Rule Monitor Main Process
JTFBRMDF	Business Rule Monitor Defect Process
JTFBRMPR	Business Rule Monitor Task Process
JTFBRMSR	Business Rule Monitor Service Request Process

Proper operation of the Business Rule Monitor requires that these four background workflow processes be started before starting the Business Rule Monitor. Use the following procedure to start these background processes.

Prerequisites

None

Steps

1. In the System Administrator responsibility, navigate to **Requests > Run**.

   The Submit a New Request window opens.

2. Select Single Request and click **OK**.

3. In the Submit Requests window, type **W** in the Name field and press the Enter key on the keyboard.

   The Reports window opens and displays report names that begin with w.

4. Select Workflow Background Process and click **OK**.

   The Parameters window opens.

5. Type **bu** in the Item Type field and press the Enter key on the keyboard.

   The Item Type window opens and displays the four Workflow background processes required by the Business Rule Monitor.

6. Select one of the four Business Rule Monitor processes and click **OK**.

   Leave the Minimum Threshold and Maximum Threshold fields empty.

7. Enter **Yes** in the Process Deferred field, and in the Process Timeout field and click **OK**.

   The Submit Request window appears in front.

8. Click **Schedule** on the Submit Request window.

   The Schedule window appears in front.

9. Select **Run the Job...Periodically**.

   More options appear for defining the time period.

10. Define the Start time and the End time.

    > **Warning:** Be sure to define an end time. When the end time field is blank, the process runs indefinitely and cannot be shut off.

11. In the Rerun Every fields, enter the number of minutes that defines the interval between job runs.

12. Select the From the Completion of the prior run box and click **OK**.

13. Repeat this entire procedure for each of the four workflow background processes.

Guidelines

Set up Notifications in Oracle Workflow to ensure that notifications are sent to e-mail.

Starting the Business Rule Monitor

The Business Rule Monitor monitors the workflow processes. In the Business Rule Monitor, you must indicate how often the monitor checks the rules. Once the Business Rule Monitor is started, there is no need to start it again, even after defining new business rules. Use this procedure to start the Business Rule Monitor.

See also

Starting the Background Workflow Processes.

Prerequisites

The four Workflow background processes for the Business Rule Monitor must be started before starting the Business Rule Monitor. If you have designed customized workflow background processes, they must also be started. In addition, the *Business Rule Monitor Administrator* profile option must be set.

Steps

1. In the CRM Administrator responsibility, navigate to **Business Rule Monitor > Business Rule Monitor**.

The Business Rule Monitor opens.

2. Enter the time period in the Interval field. Enter a time unit (minutes or hours) in the UOM field.

3. Click **Save.**

4. Click **Start** to activate the Business Rule Monitor.

A dialog box confirms that the Business Rule Monitor started successfully.

Click Workflow Monitor to view details of this process.

Guidelines

After the monitor is started, the Stop button appears. Click **Stop** to stop the monitor.

Click **Refresh Status** to get an immediate status on the Workflow background processes.

Defining a Business Rule

In addition to the pre-defined business rules provided with the Business Rule Monitor, you can define your own business rules. Use the following procedure to define a business rule.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Business Rule Monitor > Business Rules Monitor Workbench**.

   The Business Rules Monitor Workbench window opens.

2. Enter values for the following:

   - **Name**: The name of the new business rule

   - **Object**: The type of business rule

   - **Check Rule Every**: The time interval that you want

   - **Workflow**: Chose a workflow from the drop down menu.

   Attributes can be defined for the Workflow and an Owner for the business rule.

3. Use the fields in the Simple tab to construct a PL/SQL statement that defines the conditions under which the business rule is triggered.

4. Click **Validate** to check the syntax of the PL/SQL statement defined in the Simple tab. The syntax check verifies whether or not the syntax is correct.

   A dialog box confirms that the syntax validation was successful. Click **OK.**

   Click **Generate**. A dialog box confirms that your business rule has been generated.

5. Select **File > Save**.

Verifying Escalation Territory Creation

An escalation territory is a placeholder for resources that you want to put into service under certain conditions. Escalation territories are defined in Oracle Territory Management. Ensure that at least one resource is identified in the Catch All Escalation Territory.

See also

View the following topics in Territory Manager for additional information:

- Basic Territory Building Blocks
- Viewing Escalation Territories
- Creating Escalation Territories

Implementing Dynamic Tables

This topic group provides general descriptions of the setup and configuration tasks required to implement the spreadtable successfully.

Creating a New Dynamic Table

Use the Spreadtable Meta Data Administration window to design spreadtables that plug into an Oracle Forms bean area container.

- A spreadtable is the user interface component that contains rows, columns, and column headers set in a grid that can be embedded into an Oracle form.

- Oracle Forms-based CRM modules use the spreadtable to display and format dynamically retrieved data at run time. This is accomplished by predefined metadata definitions.

- Metadata is information that defines what data is retrieved at run time and how that information is presented.

Tab	Description
Database	Use to set column type and order, datatype, sequence, and default sort order.
Display	Use to set column label, visibility, display sequence, and display width.
Alignment and Formatting	Use to set type of header and cell alignment, as well as display type and format.
Custom Format Masks and Mappings	Use to set how data displays. This applies only to columns with datatype of Number. For example, it would display the values as a percent.

Tab	Description
Query	Used exclusively by Universal Work Queue. It is for internal use only.
Sort Order	Use to set the overall sort order of the columns for the spreadtable. For example, you may set the primary sort order to be alphabetical based on column A, and set a secondary sort order to be numerical based on column B.
Test	Use to test the spreadtable that you are defining.

Warning: Note the following:

Oracle does not support custom development of new forms using the spreadtable interface.

Do not delete currently existing columns when modifying an existing spreadtable. Instead, use the Freeze Visible State property in the Display tab to make the column invisible to the user.

Do not delete any existing metadata definitions.

If you modify existing metadata definitions, these changes may be overwritten by subsequent patches.

Perform the following steps to create a new spreadtable.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Spreadtable Administration**.

    The Spreadtable Meta Data Administration window opens.

2. Define a new datasource (a set of metadata) by entering the following:

    ■   **Datasource Name**: The unique name that identifies a set a metadata. It must always be <Application Prefix>_<Name>.

    ■   **Application**: The name of your product.

    ■   **Title**: A descriptive name for this set of metadata.

- **Relational View Name**: Select from the LOVs the name of the view from which information is to be retrieved to populate the spreadtable.

- **Lines/Rows**: Enter how many lines of text are to display per row.

- **WHERE Clause**: (Optional) Enter a SQL statement here if desired. Use this field to enter filtering criteria. NEVER start with the keyword WHERE, as this is automatically prepended to the statement. Always use bindvariables if the value changes at runtime.

3. Select the Database tab, if it is not already selected, and enter the following for each column that you wish to display in the spreadtable:

   - **Column Alias**: The column alias becomes part of the primary key.

   - **View Column/ Function**: Select from the LOVs the desired name of the View Column.

   - **Datatype**: Select from the LOVs either character, number, or date.

   - **Query Sequence**: The sequence value determines the order in which columns are extracted from the database. You could start with 1, but in actual practice, it is a good idea to leave gaps in the sequence for ease of row insertion later. To improve performance, begin with the columns that you will refer to in your code, typically the primary key columns to execute a query in a detail block.

   - **Sortable**: Selecting this box allows the user to sort on this column.

   - **Default Sort Order**: Sort in ascending or descending default order.

4. Select the Display tab, and enter the following for each column that you defined previously:

   - **Visible**: Select to make this column visible in the spreadtable.

   - **Freeze Visible Property**: Select if you want the end user to be able to change the visible properties (show/hide) at run time for this column.

   - **Display Sequence**: The value determines the order in which the columns display in the spreadtable.

   - **Display Width**: Sets the width (in pixels) of the displayed column. This value depends on the data that is displayed in the column.

   - The Column Alias and Label fields are supplied automatically. However, you may change these values, if desired.

5. Select the Alignment and Formatting tab, and enter the following:

- **Header Alignment**: Select from the LOVs either Center, End, Right, or Start.

- **Cell Alignment**: Select from the LOVs either Center, End, Right, or Start.

- **Display Type**: Select from the LOVs either Checkbox, Hyperlink, or Text.

- **Display Format:** (Optional) Select from the LOVs either Currency, Date, or Date Time.

6. Select the Custom Format Masks and Mappings tab.

- **Column Alias**: The column alias field is filled automatically.

- **Checkbox Mappings**: These options apply only if the display type field in the Alignments and Formatting tab is set to Checkbox.

    * **Checked**: Sets whether or not a column value is represented as a checked checkbox or as its corresponding image.

    * **Unchecked**: Sets whether or not a column value is represented as an unchecked checkbox or as its corresponding image.

    * **Other**: Sets how values other than those specified as either checked or unchecked are represented

- **Format Mask**: Use to set how columns with datatype Number display data. For example, it would display the values as a percent. Use this only in rare cases.

- **Currency Column**: Points to the database view column where the currency code for the current column is stored. This applies only if the display format is set to Currency.

7. Select the Sort Order tab, and perform the following:

- Choose the Primary Sort key from the LOVs.

- You can optionally select a second or third Sort key from the List of Values.

8. Click the Save icon on the toolbar. (The icon looks like a floppy disk.)

9. Select the Test tab, and click Test.

Your table displays. Refer to Using Dynamic Tables for additional information on spreadtables.