

Oracle® IVR Integrator

Concepts and Procedures

Release 11*i*

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ORACLE®

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Oracle IVR Integrator Concepts and Procedures, Release 11i

Part No. A86103-01

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Oracle Corporation
CRM Content Development Manager
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

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Preface

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

This Concepts and Procedures provides information and instructions to help you work effectively with Oracle IVR Integrator.

This preface explains how Concepts and Procedures 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
- Call Center Managers and Supervisors

This guide assumes you have the following prerequisites:

1. Understanding of computer-telephony integration (CTI)
2. Understanding of call center technology
3. Understanding of the company business processes
4. Understanding of Oracle databases

Structure

This manual contains the following sections:

“Understanding Oracle IVR Integrator” provides 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.

“Implementing Oracle IVR Integrator” provides general descriptions of the setup and configuration tasks required to implement the application successfully.

“Administering Oracle IVR Integrator” provides 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:

- *Installing Oracle IVR Integrator*

Oracle IVR Integrator

Oracle IVR Integrator is a server-based solution that integrates Oracle CRM applications with data collected by your interactive voice response (IVR).

This document covers the following sections:

[Understanding Oracle IVR Integrator](#)

Provides background information that you will need to understand the application and perform the tasks within the application.

[Implementing Oracle IVR Integrator](#)

Provides setup and configuration information.

[Administering Oracle IVR Integrator](#)

Provides information about modifying and managing settings within the application.

Understanding Oracle IVR Integrator

This topic group provides 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.

This topic group covers the following topics:

[Overview of Oracle IVR Integrator](#)

[Oracle IVR Integrator Processes and Business Flows](#)

[Calls Connect to Switch Before Connecting to IVR System](#)

[Data Packet is Sent to IVR Integrator When Call is Transferred](#)

[Switch Sends Call to Agent's Telephone and CTI Message to Agent's Workstation](#)

[Agent Workstation Uses the Data Packet to Retrieve the Customer Record](#)

[When a Matching Customer Record is Found](#)

[About the Oracle Campaign Database](#)

[Overview of Oracle IVR Integrator Architecture](#)

[Architecture for an IVR System That Passes the Originating Call ID](#)

[Architecture for an IVR System That Does Not Pass the Originating Call ID](#)

[About Monitoring IVR Port Tables](#)

[Matching IVR CTI Events to IVR Data Packets](#)

Overview of Oracle IVR Integrator

IVR systems collect caller data, such as account information entered by the caller or data retrieved by the IVR system from a database, like account balance, name, address, etc. When a caller requests to be transferred from the IVR system to a live agent, Oracle IVR Integrator makes the data collected by the IVR system accessible to the application on the agent's workstation.

The Oracle CRM applications can use the IVR data to retrieve customer information from the database and automatically display a customer profile (that is, a screen

pop). IVR data can also be saved to the customer record in the Oracle CRM application database via additional desktop programming.

Oracle IVR Integrator Processes and Business Flows

Click one of the following to view the process:

[Calls Connect to Switch Before Connecting to IVR System](#)

[Data Packet is Sent to IVR Integrator When Call is Transferred](#)

[Switch Sends Call to Agent's Telephone and CTI Message to Agent's Workstation](#)

[Agent Workstation Uses the Data Packet to Retrieve the Customer Record](#)

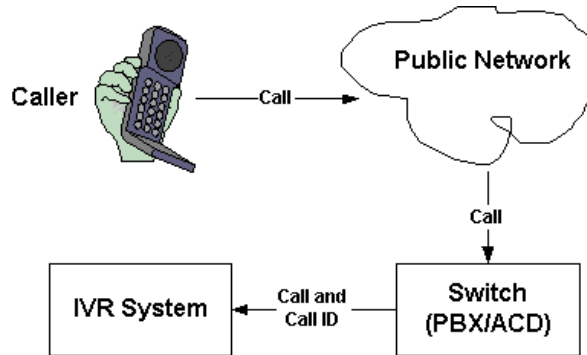
[When a Matching Customer Record is Found](#)

Calls Connect to Switch Before Connecting to IVR System

Your voice network should be set up so that calls to your IVR system connect to the switch before connecting to the IVR system. This setup is sometimes referred to as placing the IVR system "behind the switch".

The switch assigns a unique call ID to each call. The call ID assigned to the call that originates the contact with your voice network is referred to as the originating call

ID. The following diagram shows a call connecting to a switch before connecting to an IVR system.

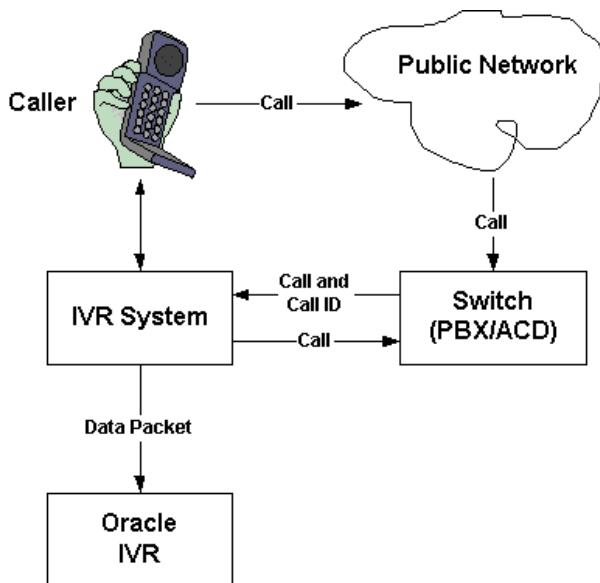


Data Packet is Sent to IVR Integrator When Call is Transferred

Oracle IVR Integrator communicates with your IVR system by receiving information (data packets) via a TCP/IP link. Oracle IVR Integrator is configured to monitor a TCP/IP port from the IVR. Your IVR system should be configured to generate an ASCII file (also called a data packet) containing caller data and then send the data packet to the Oracle IVR Integrator TCP/IP port, whenever a call is transferred from the IVR system to a live agent.

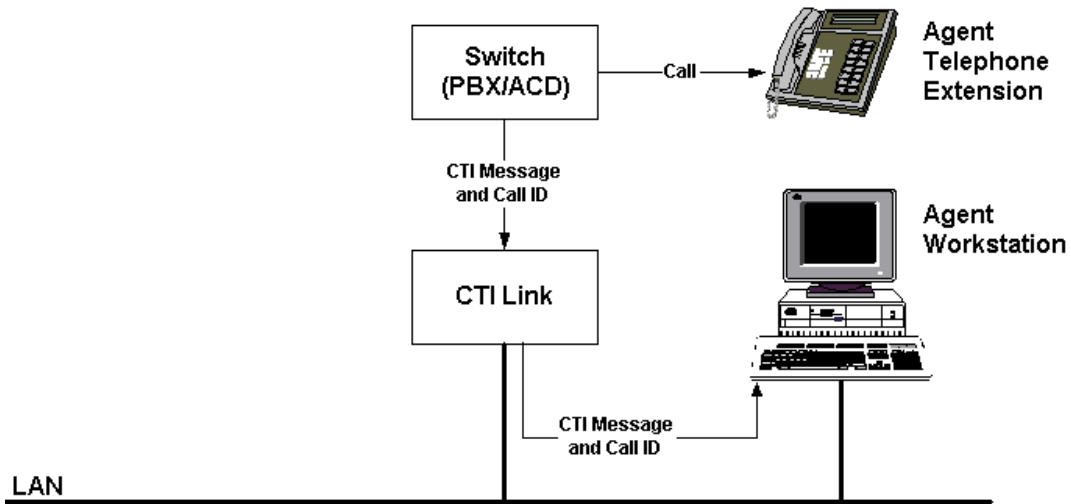
The call flow begins when a caller calls the telephone number for your IVR system. The call enters the switch and the switch assigns a call ID to the call and transfers the call to your IVR system. The caller interacts with the IVR system (for example, by entering an account number). When the caller requests to be transferred to a live agent, the IVR system sends the call to the switch and sends a data packet containing caller data to the Oracle IVR Integrator TCP/IP port. When Oracle IVR Integrator detects a connection at the TCP/IP port, it retrieves the waiting data packet and stores the data packet in a log. IVR Integrator also stores an Identifier (typically a call ID) for the data packet. The following diagram shows an IVR

system sending a data packet to Oracle IVR Integrator when a call is transferred to an agent's extension.



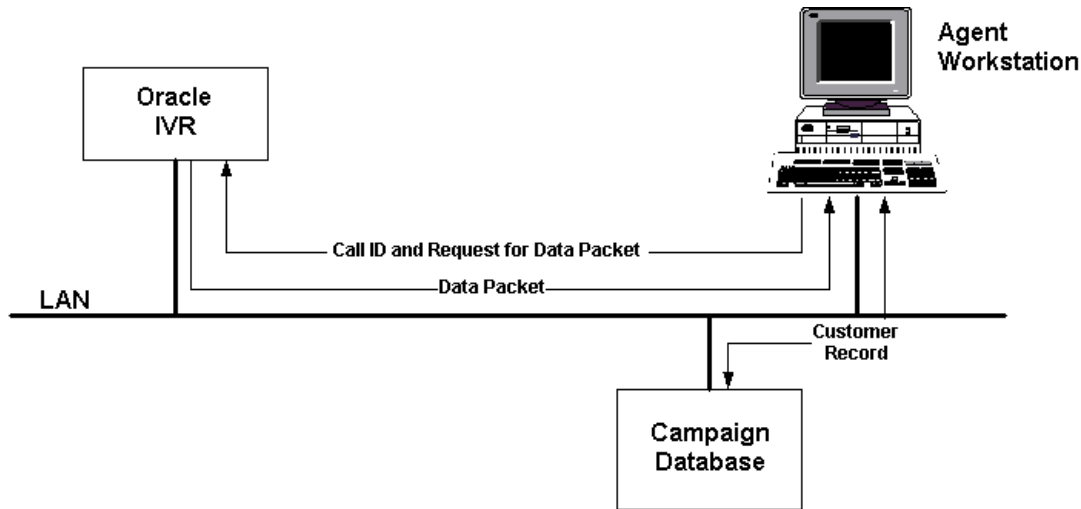
Switch Sends Call to Agent's Telephone and CTI Message to Agent's Workstation

The switch transfers the call to an agent's telephone extension. The switch also sends a CTI message containing the call ID to the agent's workstation. The following diagram shows a switch sending a call to an agent's extension and a CTI message to the agent's workstation.



Agent Workstation Uses the Data Packet to Retrieve the Customer Record

The Oracle CRM application uses the call ID to retrieve the data packet from the Oracle IVR Integrator log. An Oracle IVR Integrator data map matches the call ID at the agent workstation with the call ID at the IVR. The Oracle CRM application uses the data map and the data in the data packet to find a customer record in the Oracle CRM database. The following diagram shows the Oracle CRM vertical application retrieving the data packet from Oracle IVR Integrator and the customer record from the Oracle application database.



When a Matching Customer Record is Found

If a matching customer record is found, a screen pop is produced on the agent's workstation by the time the caller's voice arrives at the agent's telephone extension. Depending on the details of the Oracle IVR Integrator data map and desktop programming to move data into the customer record, the data from the data packet may also be saved to the customer record.

About the Oracle Campaign Database

The Oracle IVR data map associates data in the IVR data packet with fields in the CUSTOMER table of the Oracle campaign database. Your IVR system determines what data is captured to the data packet that is presented to the CRM application.

The Oracle IVR data map, configured in the Oracle system database, determines how that data is mapped to fields in the Oracle campaign database. The IVR data packet consists of pairs of data labels and data delimited by a separator character (such as a semicolon). Each entry in the data map provides the following information.

Label: The label for the IVR data.

Position: The character position of the start of the data in the IVR data packet.

Length: The length, in number of characters, of the IVR data.

DB_Field_Name: The name of a field in the CUSTOMER table of the Oracle campaign database that corresponds to the IVR data. The Oracle Telesales/Teleservice client application uses the IVR data to find a customer record in the Oracle campaign database and provide a screen pop (account number, name, phone number, etc.).

VTT_Field_Name: The name of the field in the CUSTOMER table of the Oracle campaign database to which the IVR data should be stored.

You can use the IVR data in more than one data map entry (for example, account number and Zip code) to locate a customer record. The Oracle Telesales/Teleservice client application will evaluate all data map entries with a field name selected. You can use Boolean operators (AND or OR) between data map entries to define your selection criteria.

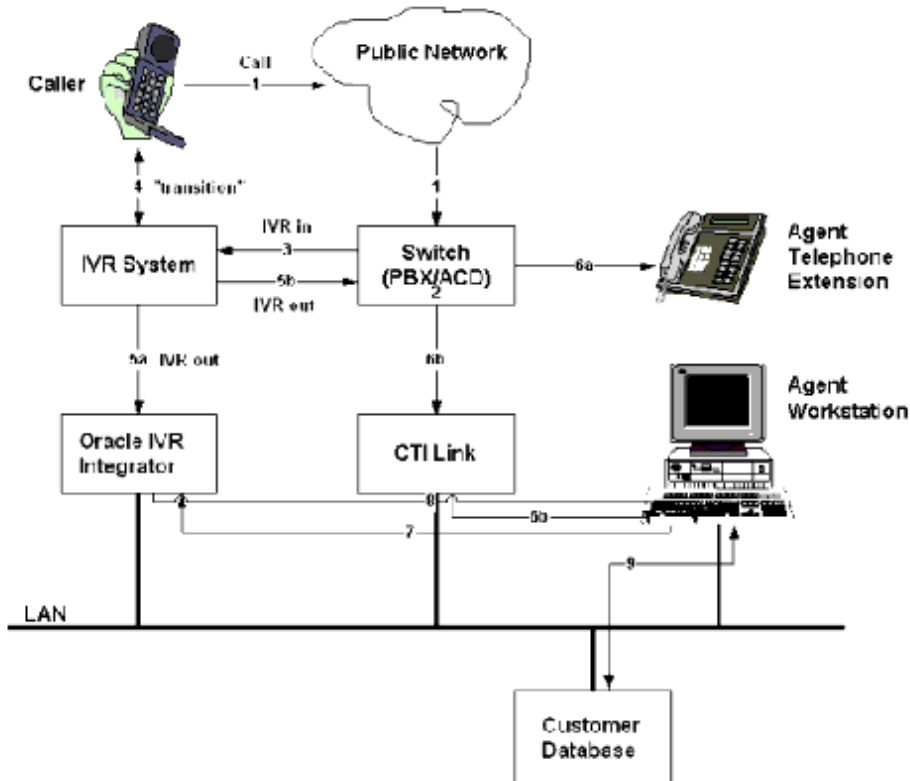
Overview of Oracle IVR Integrator Architecture

The call ID assigned to the call that originates the contact with your voice network is referred to as the originating call ID. The Oracle CRM application uses the originating Call ID to retrieve the IVR data packet for a call from Oracle IVR Integrator and also associates IVR data to the call. The architecture that is appropriate for your network will depend on how your switch and IVR system handle the originating call ID.

The most common architectures for an Oracle CRM system using Oracle IVR Integrator involve a single switch and an IVR system comprising one or more IVR units. If your voice network uses multiple switches or cannot accommodate the architectures describes in the following sections, please contact your Oracle consultant.

Architecture for an IVR System That Passes the Originating Call ID

When the IVR system passes the originating call ID in the data packet, the data packet can be sent from the IVR system directly to the Oracle IVR Integrator log. The following diagram shows the preferred architecture.

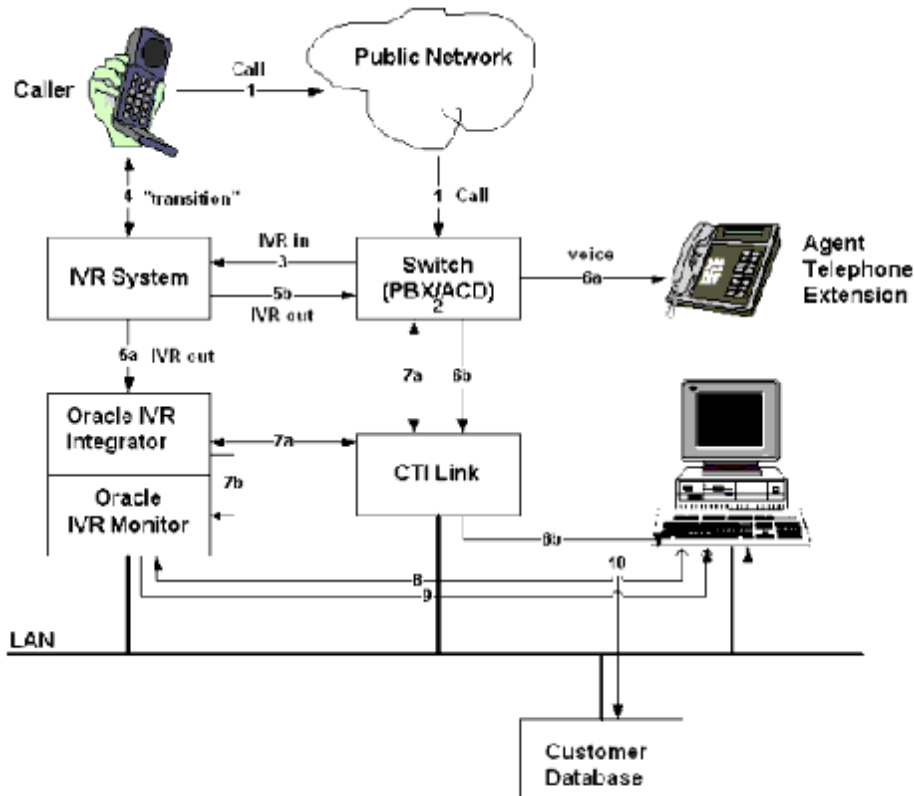


The call flow begins when a caller calls the telephone number for your IVR system. The call enters the switch (1) and the switch generates a unique call ID to the call (2) and transfers the call with the call ID to the IVR system (3). The caller interacts with the IVR system and request to be transferred to a live agent (4). The IVR system sends the data packet with the call ID to Oracle IVR Integrator (5a) and sends the call to the switch (5b). The switch transfers the call to an agent's telephone extension (6a) and sends a message containing the call ID to the agent's workstation (6b).

The Oracle CRM vertical application uses the call ID to retrieve the data packet from the Oracle IVR Integrator log (7). Oracle IVR Integrator sends the data packet to the Oracle CRM vertical application (8). The Oracle CRM vertical application uses the data in the data packet to retrieve a customer record from the Oracle application database or update a customer record (9).

Architecture for an IVR System That Does Not Pass the Originating Call ID

When the IVR system does not pass the originating call ID in the data packet (for example, the switch assigns a new call ID when the call is transferred to the IVR system or the IVR system is incapable of passing any call ID), the originating call ID must be retrieved from the switch and inserted into the data packet before the data packet is sent to the Oracle IVR Integrator log. This is achieved using a monitor for Oracle IVR Integrator. The following diagram shows the preferred architecture.



The call flow begins when a caller calls the telephone number for your IVR system. The call enters the switch (1) and the switch generates a unique call ID to the call (2) and transfers the call to the IVR system (3). The caller interacts with the IVR system and request to be transferred to a live agent (4). The IVR system sends the data

packet with the IVR port number for the call to Oracle IVR Integrator monitor (5a) and sends the call to the switch (5b). The switch transfers the call to an agent's telephone extension (6a) and sends a message containing the call ID to the agent's workstation (6b).

Oracle IVR Integrator monitor retrieves the CTI information for the call from the switch (7a) and sends the data packet with the call ID to Oracle IVR Integrator (7b). The Oracle CRM vertical application uses the call ID to retrieve the data packet from the Oracle IVR Integrator log (8). Oracle IVR Integrator sends the data packet to the Oracle CRM vertical application (9). The Oracle CRM vertical application uses the data in the data packet to retrieve a customer record from the Oracle application database or update a customer record (10).

About Monitoring IVR Port Tables

When the IVR system does not pass the originating call ID in the data packet, the originating call ID must be retrieved from the CTI event message for the originating call and inserted into the data packet before the data packet is sent to the Oracle IVR log. Oracle IVR Monitor monitors the CTI event messages for the IVR ports and attempts to match the IVR data packet received from the IVR system with the CTI event message for the originating call.

The Oracle IVR Monitor port table, configured in the Oracle system database, lists the IVR ports to be monitored. Each entry in the Oracle IVR Monitor port table provides the following information.

PBX Name: The logical name of the CTI link between the CTI server and the switch.

Port Name: The name of the IVR port to be monitored. The port name comprises the IVR host name (also called the IVR identifier) and the IVR port number. For example, if the IVR host name is 01 and the IVR port number is 0001, then the port name is 010001. The IVR host name can be found in the IVR data packet.

Extension: The switch extension for the IVR port.

Status: The status of the IVR port (Inactive or Active). The status governs whether the Oracle IVR Monitor service monitors an IVR port. The Oracle IVR Monitor service will not monitor an IVR port with an inactive status.

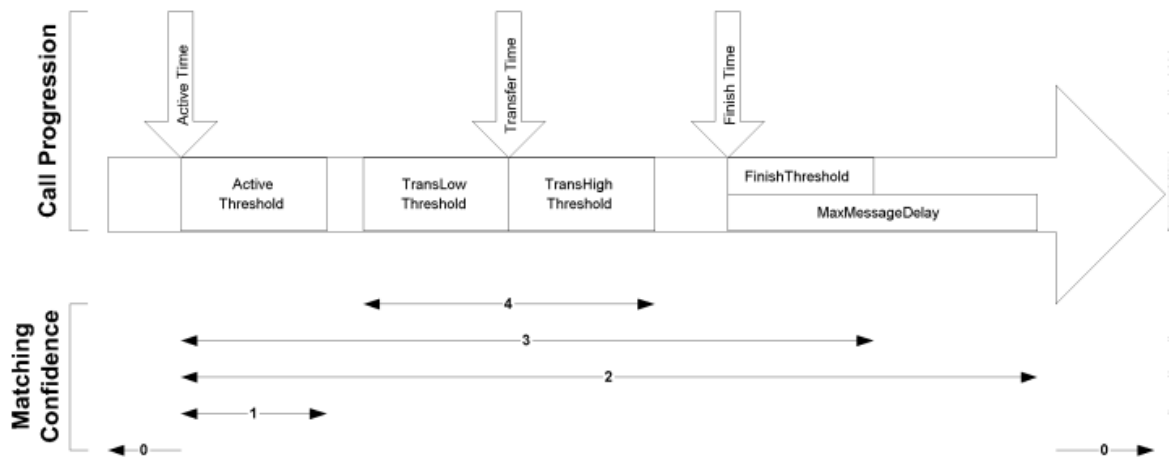
Matching IVR CTI Events to IVR Data Packets

Oracle IVR Monitor monitors the CTI event messages for the IVR ports and attempts to match the IVR data packet received from the IVR system with the CTI event message for the originating call. When there is more than one CTI message

associated with an IVR port, Oracle IVR Monitor uses a matching algorithm to select the CTI event message for the originating call.

The parameters for the matching algorithm, configured in the Oracle system database, correspond to events that occur during the progression of a call (active time, transfer time, and finish time).

The IVR Monitor service compares the time that the IVR data packet was received to various events during the progression of the call(s) and establishes a level of confidence to the possible match. The call with the highest level of confidence is considered a match.



In the diagram above, a data packet received during the TransHigh Threshold of the call would be considered a match. The following table outlines the levels of matching confidence.

Level of Matching Confidence	Description
0	Match impossible
1	Low confidence
2	Medium confidence
3	High confidence
4	Match

Implementing Oracle IVR Integrator

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

This topic group covers the following topics:

[What are Configuration Worksheets?](#)

[Worksheet for Oracle Integrated Manager Configuration](#)

[Worksheet for Virtual PBX Service Configuration](#)

[Worksheet for Oracle IVR Integrator Service Configuration](#)

[Worksheet for Oracle IVR Integrator Monitor Configuration](#)

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Modifying a Virtual PBX Service](#)

[Deleting a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

[Modifying an Oracle IVR Integrator Service](#)

[Deleting an Oracle IVR Integrator Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

[Modifying an Oracle IVR Integrator Monitor](#)

[Deleting an Oracle IVR Integrator Monitor](#)

[Setting Filters for Logs](#)

[Activating Alerts](#)

What are Configuration Worksheets?

Configuration worksheets are designed to help you gather the information required to configure IVR Integrator for use. All of the information in the worksheet must be entered in the configuration procedure. To properly configure Oracle IVR Integrator, please use the worksheet.

Select one of the following worksheets:

- [Worksheet for Oracle Integrated Manager Configuration](#)
- [Worksheet for Virtual PBX Service Configuration](#)
- [Worksheet for Oracle IVR Integrator Service Configuration](#)
- [Worksheet for Oracle IVR Integrator Monitor Configuration](#)

Worksheet for Oracle Integrated Manager Configuration

Please complete the following:

- Identify the data source name and logon parameters for the Oracle CRM database:
 - Data source name: _____
 - Database user ID: _____
 - Database password: _____
- Identify the POM server name: _____

Worksheet for Virtual PBX Service Configuration

Please complete the following:

- Identify the name of the virtual PBX service: _____

Note: The virtual PBX name is used to identify the PBX in Oracle Integrated Manager. It does not reflect or affect the actual PBX configuration.

- Identify the PBX type: _____
- If the PBX is CTI-enabled, identify the following CTI parameters:
 - The name of your CTI middleware: _____
 - The name of the machine hosting the CTI middleware: _____

- The network protocol used by the CTI server to communicate with the switch: _____

Note: The network protocol used by the CTI server to communicate with the switch should have been set as part of the logical link configuration on the CTI server. The default is ncacl_ip_tcp.

- The actual name given to the physical PBX when it was configured: _____
- If using Oracle Predictive, identify the local call data file to be used during predictive dialing: _____

Worksheet for Oracle IVR Integrator Service Configuration

Please complete the following:

- Identify the name of the new Oracle IVR Integrator service:

- Identify the machine hosting the Oracle IVR Integrator service:

- Identify the following directories and/or files on the machine where Oracle IVR Integrator is installed:
 - Oracle IVR Integrator service executable:
\\...\IVRServerbin\IVR_Service.exe
 - Oracle IVR Integrator service backup data file:
\\...\IVRSrvrData\backup.dat
 - Directory in which the IVR data packets will be stored:
\\...\IVRSrvrTrans
 - Directory in which the Oracle IVR Integrator service log files will be stored:
\\...\IVRServerLogs
- Identify the following information about the ODBC data source being used to access the Oracle CRM application database:

- Data source name: _____
- Database user ID: _____
- Database password: _____
- Identify the following information about the DCE cell:
 - DCE cell principal name: _____
 - DCE cell password: _____
- If using Oracle IVR Integrator *alone* (that is, without a monitor), identify the following parameters for the Oracle IVR Integrator service:
 - The time after which unmatched IVR data packets are purged from the Oracle IVR Integrator service: _____
 - The TCP/IP port that the Oracle IVR Integrator service will listen to when waiting for connections from the IVR system:

 - The number of receive data threads that can be allocated: _____
 - The position of the key (that is, originating call ID or the UUID) in the IVR backup data: _____
 - The length of the key in the IVR data packet: _____
 - The length of the IVR data packet: _____
 - The position of the key in the IVR data packet: _____

Note: For IVR data packets with no header, the key is typically at the start of the data packet (that is, at position 0).

- The maximum number of IVR network connections (typically corresponds to the number of IVR units): _____
- The character separator for the data pairs in the IVR data packet: _____
- Whether the TCP/IP network protocol is to be used by the Oracle IVR Integrator service to communicate with the IVR system:
 - * _____ Yes
 - * _____ No

- If using Oracle IVR Integrator *with a monitor*, identify the following parameters for the Oracle IVR Integrator service:
 - The time after which unmatched IVR data packets are purged from the Oracle IVR Integrator service: _____
 - The TCP/IP port that the Oracle IVR Integrator service will listen to when waiting for connections from the Oracle IVR Integrator monitor:

 - The number of receive data threads that can be allocated: _____
 - The position of the key (that is, originating call ID or the UUID) in the IVR backup data: _____
 - The length of the key in the IVR data packet: _____
 - The length of the IVR data packet: _____
 - The position of the key in the IVR data packet: _____

Note: For IVR data packets with no header, the key is typically at the start of the data packet (that is, at position 0).

 - The maximum number of IVR network connections (typically corresponds to the number of IVR units): _____
 - The character separator for the data pairs in the IVR data packet: _____
 - Whether the TCP/IP network protocol is to be used by the Oracle IVR Integrator service to communicate with the Oracle IVR Integrator monitor:
 - * _____ Yes
 - * _____ No
- Identify the items in the IVR data packet sent to the Oracle CRM application that you want to use to produce a screen pop and/or save to the customer database. For each data item, identify the following parameters:
 - Data label: _____

Note: The data label is only for the purpose of identifying the data in Oracle Integrated Manager and does not affect the data label in the IVR data packet.

- The position of the data item in the IVR data packet: _____
- The length of the data item in the IVR data packet: _____
- The corresponding field from the CUSTOMER table in the Oracle application production (campaign) database:

Worksheet for Oracle IVR Integrator Monitor Configuration

Please complete the following:

- Identify the name of the new Oracle IVR Integrator monitor:

- Identify the machine hosting the IVR service: _____
- Identify the following directories and/or files on the machine where Oracle IVR Integrator is installed:
 - Oracle IVR Integrator monitor executable:
 \\...\IVRMonitorbin\IVR_Monitor.exe
 - Directory in which the Oracle IVR Integrator monitor log files will be stored:
 \\...\IVRMonitorLogs
- Identify the following telephony parameters:
 - The name of the machine hosting the CTI middleware:

 - The name of the logical link from CTI server to the switch:

 - The network protocol used by the CTI server to communicate with the switch: _____
 - Identify the following DLL parameters:

Note: The network protocol should have been set as part of the logical link configuration on the CTI server. The default is ncacl_ip_tcp.

-
- The name of the CTI DLL files used by the switch to communicate with the CTI server.
 - * ____ Accept the default: ivr_ctcenb.dll
 - * ____ Choose a different DLL file: _____
 - The name of the TCP/IP DLL file used by the switch to communicate with the IVR system interface.
 - * ____ Accept the default: ivr_tcpip.dll
 - * ____ Choose a different DLL file: _____
 - Identify the following network parameters:
 - The machine hosting the Oracle IVR Integrator service to be monitored:

 - The TCP/IP port that the monitor will use to connect to the Oracle IVR Integrator service: _____
 - The TCP/IP port that the monitor will listen to when waiting for connections from the IVR system: _____
 - The length of the IVR port number in the IVR data packet: _____

 Note: The length of the IVR port number is usually 4 characters.

 - The position of the IVR port number in the IVR data packet: _____

 Note: The IVR port number is typically found after the host name (that is, at position 2).

 - The length of the key (that is, the originating call ID or the UUID) to be added to the IVR data packet: _____
 - The number of IVR units connected to the monitor: _____
 - Identify the following threshold parameters:

- The amount of time, in seconds, after the beginning of the call (but before the Transfer Low Threshold) for which an IVR data packet should be considered as a possible match: _____

Note: IVR data packets received before the beginning of the call are not considered a possible match.

- IVR data packets received before the beginning of the call are not considered a possible match.
- The amount of time, in seconds, after the finish of the call (but before the Max Message Delay Time) for which an IVR data packet should be considered as a possible match: _____
- The amount of time, in seconds, before the transfer of the call for which an IVR data packet should be considered as a possible match:

- The amount of time, in seconds, after the transfer of the call for which an IVR data packet should be considered as a possible match:

- Identify the following data parameters:

- The position of the IVR host name (that is, the IVR identifier) in the IVR data packet: _____

Note: The host name is typically at the start of the data packet (that is, at position 0).

- The length of the IVR host name in the IVR data packet: _____

Note: The length of the host name is typically 2 characters.

- The length of the host name is typically 2 characters.
- The number of receive data threads that can be allocated: _____
- The length of the IVR data packet: _____
- Whether a return data packet is being sent back to the IVR system:

- * ____ Yes
- * ____ No
- The position of the return data (if a return data packet is being send back to the IVR system):_____
- The length of the return data (if a return data packet is being send back to the IVR system):_____
- Identify the following CTI parameters:
 - The Oracle PBX Type:
 - * ____ Meridian: 1
 - * ____ Lucent: 2
 - * ____ Other: _____
 - The PBX type:
 - * ____ Meridian: M
 - * ____ Lucent: A
 - * ____ Other: _____
 - The time, in seconds, after which the monitor will delete an IVR data packet for which a call match cannot be found on the switch:

 - The amount of time, in seconds, after the finish of the call for which an IVR data packet should be considered as a possible match:

Note: The Max Message Delay Time should be greater than the Finish Threshold. IVR data packets received after the Max Message Delay Time are not considered a possible match.

 - The time, in seconds, after which the monitor will restart the CTI interface when the Retry Limit is exceeded:

 - The time, in seconds, after which the monitor will reinitialize the CTI extension when CTI initialization fails:_____

- The maximum number of times the monitor should attempt to initialize the CTI interface before restarting the CTI interface:

- Whether the UUID (rather than an originating call ID) is to be added to the IVR data packet:

- * Yes

- * No

- The time, in seconds, after which old calls and CTI messages are cleared:

- The total number of IVR ports: _____

- Identify the IVR ports to be monitored by the Oracle IVR Integrator monitor. For each IVR port, identify the following parameters:

- Data label: _____

Note: The data label is only for the purpose of identifying the data in Oracle Integrated Manager and does not affect the data label in the IVR data packet.

- The logical name of the CTI link from the PBX to the switch:

- The name of the port.: _____

Note: The port name should comprise the IVR host name and the IVR port number. For example, if the IVR host name is 01 and the IVR port number is 0001, then the port name should be 010001. The IVR host name can be found in the IVR data packet.

- The switch directory number of the IVR port: _____

- Whether the port is currently in service:

- * Yes

- * No

Configuring Oracle Integrated Manager

Use this procedure to configure Oracle Integrated Manager.

Prerequisites

None

Steps

1. Start the Registry Configuration Console for Oracle Integrated Manager.
2. In the System Database Information area, specify the data source name, user ID, and password for the Oracle CRM application database.
3. In the Campaign Database Information area, specify the data source name, user ID, and password for the Oracle CRM production (campaign) database.
4. In the POM Server Name box, select the desired server name.
5. Click **Apply** and then close the Registry Configuration Console.

References

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

Creating a Virtual PBX Service

Use this procedure to create a virtual PBX service.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Click **PBX Configuration** and then click **Action**, then **New**, then **Virtual PBX Service**. The Create PBX Wizard appears.
3. Click **Next**.

4. Type the name of the virtual PBX service and then click **Next**.
5. Select the PBX type and then click **Next**.
6. If the PBX is CTI-enabled, specify the following CTI parameters:

Parameter	Description
CTI enabler	Select the name of your CTI middleware.
CTI server name	Type the name of the machine hosting the CTI middleware.
CTI network type	Select the network protocol used by the CTI server to communicate with the switch. This should have been set as part of the logical link configuration on the CTI server. The default is <code>ncacn_ip_tcp</code> .
Actual PBX name	Type the actual name given to the physical PBX when it was configured.

7. Click **Next**.
8. If using Oracle Predictive, use the **Browse** button to select the local call data file to be used during predictive dialing.
9. Click **Finish** to create the monitor for the virtual PBX service based on the parameters entered in the wizard.

The virtual PBX service appears in the scope pane of the Microsoft Management Console under the PBX Configuration node for Oracle Integrated Manager.

References

- [Configuring Oracle Integrated Manager](#)
- [Creating an Oracle IVR Integrator Service](#)
- [Creating an Oracle IVR Integrator Monitor](#)

Modifying a Virtual PBX Service

Use this procedure to modify a virtual PBX service.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **PBX Configuration** node.
3. Click the virtual PBX service that you want to modify and then click **Action**, then **All Tasks**, then **View Properties**. The PBX Properties dialog box appears.
4. Use the PBX Properties dialog box to edit the properties of the virtual PBX service.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

Deleting a Virtual PBX Service

Use this procedure to delete a virtual PBX service.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **PBX Configuration** node.
3. Click the virtual PBX service that you want to delete and then click **Action**, then **All Tasks**, then **Delete PBX Service**.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

Creating an Oracle IVR Integrator Monitor

Creating an Oracle IVR Integrator Service

Use this procedure to create an IVR Integrator service.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **Inbound** node.
3. Click **IVR Services** and then click **Action**, then **New**, then **IVR Service**. The **Create New IVR** wizard appears. Click **Next**.
4. Type the name of the IVR service (for example, `IVR_Service`), select the machine hosting the IVR service, and then click **Next**.
5. Click the **Browse** button to the right of the Path to executable and name box. The Browse for Folder dialog box appears.
6. Select the executable file for the Oracle IVR Integrator service (for example, `\\...\IVRServerbin\IVR_Service.exe`) and then click **OK**. The selected path and file will appear in the **Create New IVR** wizard.
7. Use the **Browse** buttons to select the path and, where appropriate, file for the following items:
 - Oracle IVR Integrator service backup data file (for example, `\\...\IVRSrvrData\backup.dat`)
 - Directory in which the IVR data packets will be stored (for example, `\\...\IVRSrvrTrans`)
 - Directory in which the Oracle IVR Integrator service log files will be stored (for example, `\\...\IVRServerLogs`). Click **Next**.
8. Select a create option and then click **Next**.
9. Select the ODBC data source name being used to access the Oracle application database.
10. Type the database logon and password, and then click **Next**.

11. Type the DCE cell principal name and password, and then click **Next**.

12. Specify the following service parameters:

Parameter	Description
Data Queue Purge Time	Select the time after which unmatched IVR data packets are purged from the Oracle IVR Integrator service.
Net Listen Port	Select the TCP/IP port that the Oracle IVR Integrator service will listen to when waiting for connections from the IVR system (or Oracle IVR Integrator monitor, depending on your Oracle architecture).
Receive Data Thread	Select the number of receive data threads that can be allocated.
Hash Key Position	Select the position of the key in the IVR backup data. This is the originating call ID or the UUID, depending on the configuration of the IVR system.
Hash Key Size	Select the length of the key in the IVR data packet. This is the originating call ID or the UUID, depending on the configuration of the IVR system.
Data Size	Select the length of the IVR data packet.
Message Key Position	Select the position of the key in the IVR data packet. For IVR data packets with no header, the key is typically at the start of the data packet (that is, at position 0).
Maximum Connections	Select the maximum number of IVR network connections. This usually corresponds to the number of IVR units.
Data Separator	Type the character separator for the data pairs in the IVR data packet.
Run With Monitor	Select this checkbox if the Oracle IVR Integrator service is begin used with an Oracle IVR Integrator monitor.
User TCP/IP	Select this checkbox if the TCP/IP network protocol is to be used by the Oracle IVR Integrator service to communicate with the IVR system (or the Oracle IVR Integrator monitor, if used).

13. Click **Next**.

14. Do one of the following:

To...	Do This...
Add an item to the data map	<ol style="list-style-type: none"> Specify the following parameters: <ul style="list-style-type: none"> Data Label: Type the label for the data item in the IVR data packet. Data Position: Type the position of the data item in the IVR data packet. Data Length: Type the length of the data item in the IVR data packet. Oracle Name: To store this item in a customer record in the CUSTOMER table of the Oracle CRM production (campaign) database, select the name of the Oracle Name field in which the item should be stored. <p>Note: The Oracle Name fields available in the list are defined in the IVR_VTT_VARIABLES lookup table using Oracle CRM application Administrator. Use the TM_LKLEN data maintenance routine in Oracle CRM application Administrator to define a code length of 60 for the IVR_VTT_VARIABLES table.</p> DB Field Name: To produce a screen pop based on this item, select the name of the corresponding field from the CUSTOMER table in the Oracle CRM production (campaign) database. <p>Note: A screen pop will be produced based on all data map items with a selected database field name.</p> Click Add.
Edit an item in the data map	<ol style="list-style-type: none"> Click a line in the data map. Edit the parameters for the item and then click Edit.
Delete an item in the data map	Click a line in the data map and then click Delete .

15. Click **Next**.

16. Click **Finish** to create the Oracle IVR Integrator service based on the parameters entered in the wizard.

The Oracle IVR Integrator service appears in the scope pane of the Microsoft Management Console under the IVR Service node for Oracle Integrated Manager.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

Modifying an Oracle IVR Integrator Service

Use this procedure to modify an IVR Integrator service.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **Inbound** node and then expand the **IVR Services** node.
3. Click the Oracle IVR Integrator service that you want to modify and then click **Action->All Tasks->View Properties**. The IVR Service Properties dialog box appears.
4. Use the IVR Service Properties dialog box to edit the properties of the Oracle IVR Integrator service.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

Deleting an Oracle IVR Integrator Service

Use this procedure to delete an IVR Integrator service.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **Inbound** node and then expand the **IVR Services** node.
3. Click the Oracle IVR Integrator service that you want to delete and then click **Action->All Tasks->Delete IVR Service**.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

Creating an Oracle IVR Integrator Monitor

Use this procedure to create an IVR Integrator Monitor.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **Inbound** node.
3. Click IVR Services and then click **Action->New->IVR Monitor**. The **Create New IVR Monitor** wizard appears.
4. Click **Next**.
5. Type the name of the new Oracle IVR Integrator monitor (for example, **IVR_Monitor**).
6. Click the **Browse** button to the right of the Path to the IVR monitor executable box. The Browse for Folder dialog box appears.
7. Select the executable file for the Oracle IVR Integrator monitor (for example, `\\...\IVRMonitorbin\IVR_Monitor.exe`) and then click **OK**. The selected path and file will appear in the **Create New IVR Monitor** wizard.

8. Use the **Browse** button to select the directory in which the Oracle IVR Integrator monitor log files will be stored (for example, \\...\IVRMonitorLogs), and then click **Next**.

9. Specify the following telephony parameters:

Parameter	Description
CTI Server Name	Use the Browse button to select the machine hosting the CTI middleware.
CTI Logical ID	Type the name of the logical link from CTI server to the switch.
CTI Network Type	Select the network protocol used by the CTI server to communicate with the switch. This should have been set as part of the logical link configuration on the CTI server. The default is ncaen_ip_tcp.

10. Click **Next**.

11. Specify the following DLL parameters:

Parameter	Default	Description
CTI DLL Name	ivr_ctcemb.dll	Type the name of the CTI DLL files used by the switch to communicate with the CTI server.
TCP/IP DLL Name	ivr_tcpip.dll	Type the name of the TCP/IP DLL file used by the switch to communicate with the IVR system interface.

12. Click **Next**.

13. Specify the following network and data parameters:

Parameter	Description
Application Host Name	Use the Browse button to select the machine hosting the Oracle IVR Integrator service to be monitored.
Application Host Port	Select the TCP/IP port that the monitor will use to connect to the Oracle IVR Integrator service.
Host Name Data Position	Select the position of the IVR host name (that is, the IVR identifier) in the IVR data packet. The host name is typically at the start of the data packet (that is, at position 0).
Host Name Data Length	Select the length of the IVR host name in the IVR data packet. The length of the host name is typically 2 characters.

14. Click **Next**.

15. Specify the following network parameters:

Parameter	Description
Monitor Listen Port	Select the TCP/IP port that the monitor will listen to when waiting for connections from the IVR system.
Monitor Port Length	Select the length of the IVR port number in the IVR data packet. The length of the IVR port number is usually 4 characters.
Monitor Port Data Position	Select the position of the IVR port number in the IVR data packet. The IVR port number is typically found after the host name (that is, at position 2).
Monitor Key Data Size	Select the length of the key to be added to the IVR data packet. This is the originating call ID or the UUID, depending on the configuration of the IVR system.

16. Click **Next**.

17. Specify the following threshold and CTI parameters:

Parameter	Description
Active Threshold	Select the amount of time, in seconds, after the beginning of the call (but before the Transfer Low Threshold) for which an IVR data packet should be considered as a possible match. IVR data packets received before the beginning of the call are not considered a possible match.
Finish Threshold	Select the amount of time, in seconds, after the finish of the call (but before the Max Message Delay Time) for which an IVR data packet should be considered as a possible match.
Transfer Low Threshold	Select the amount of time, in seconds, before the transfer of the call for which an IVR data packet should be considered as a possible match.
Transfer High Threshold	Select the amount of time, in seconds, after the transfer of the call for which an IVR data packet should be considered as a possible match.
Use UUID	Select this checkbox if the UUID is to be added to the IVR data packet. If the call ID is to be added to the IVR data packet, this checkbox should be cleared.
Oracle PBX Type	Select the Oracle PBX Type. For Meridian switches, select 1. For Lucent switches, select 2.
PBX Type	Type the PBX type. For Meridian switches, type M. For Lucent switches, type A.

Parameter	Description
Max IVR Number	Select the number of IVR units connected to the monitor.
Total Port	Select the total number of IVR ports.
Retry Limit	Select the maximum number of times the monitor should attempt to initialize the CTI interface before restarting the CTI interface.

18. Click **Next**.

19. Specify the following CTI and data parameters:

Parameter	Description
Message Clean Up Time	Select the time, in seconds, after which the monitor will delete an IVR data packet for which a call match cannot be found on the switch.
Max Message Delay Time	Select the amount of time, in seconds, after the finish of the call for which an IVR data packet should be considered as a possible match. The Max Message Delay Time should be greater than the Finish Threshold. IVR data packets received after the Max Message Delay Time are not considered a possible match.
Restart Time	Select the time, in seconds, after which the monitor will restart the CTI interface when the Retry Limit is exceeded.
Connection Time	Select the time, in seconds, after which the monitor will reinitialize the CTI extension when CTI initialization fails.
Periodical Clean Up Time	Select the time, in seconds, after which old calls and CTI messages are cleared.
Receive Data Thread	Select the number of receive data threads that can be allocated.
Receive Data Size	Select the length of the IVR data packet.
Return Data Flag	Click this checkbox if a return data packet is being sent back to the IVR system.
Return Data Position	If a return data packet is being send back to the IVR system, select the position of the return data.
Return Data Size	If a return data packet is being send back to the IVR system, select the length of the return data.

20. Click **Next**.

21. Do one of the following:

To...	Do This...
Create a port table	<ol style="list-style-type: none"> 1. Click Add New. 2. Use the Edit Port Table dialog box to list the ports to be monitored. See step 23.
Edit a port table	<ol style="list-style-type: none"> 1. Select a port table and then click Edit. 2. Use the Edit Port Table dialog box to edit the ports to be monitored. See step 23.
Delete a port table	Select a port table and then click Delete .

22. If **Add New or **Edit** is selected, then the Edit Port Table dialog box appears.**

23. Do one of the following:

To...	Do This...
Add a port	<ol style="list-style-type: none"> 1. Specify the following parameters in the Port Information area: <ul style="list-style-type: none"> ■ PBX Name: Type the logical name of the CTI link from the PBX to the switch. ■ Port Name: Type the name of the port. The port name should comprise the IVR host name and the IVR port number. For example, if the IVR host name is 01 and the IVR port number is 0001, then the port name should be 010001. The IVR host name can be found in the IVR data packet. ■ Extension: Type the switch directory number of the IVR port. ■ Active: If the extension is currently in service, click Active. 2. Click Add.
Edit a port	<ol style="list-style-type: none"> 1. Click a line in the port table. 2. Edit the parameters for the selected port in the Port Information area and then click Edit.
Delete a port	Click a line in the port table and then click Delete .

24. Click **OK to close the Edit Port Table dialog box. The **Create New IVR Monitor** wizard appears.**

25. Click **Next.**

26. Click **Finish** to create the monitor for the Oracle IVR Integrator service based on the parameters entered in the wizard.

The monitor appears in the scope pane of the Microsoft Management Console under the Oracle IVR Integrator service node for Oracle Integrated Manager.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

Modifying an Oracle IVR Integrator Monitor

Use this procedure to modify an IVR Integrator monitor.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **Inbound** node and then expand the **IVR Services** node.
3. Expand an Oracle IVR Integrator service node.
4. Click the monitor that you want to modify and then click **Action->All Tasks->View Properties**. The IVR Monitor Properties dialog box appears.
5. Use the IVR Monitor Properties dialog box to edit the properties of the monitor.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

Deleting an Oracle IVR Integrator Monitor

Use this procedure to delete an IVR Integrator monitor.

Prerequisites

None

Steps

1. Start Oracle Integrated Manager and expand the **Oracle Integrated Manager** node, if you have not already done so.
2. Expand the **Inbound** node and then expand the **IVR Services** node.
3. Expand an Oracle IVR Integrator service node.
4. Click the monitor that you want to delete and then click **Action->All Tasks->Delete IVR Monitor**.

References

[Configuring Oracle Integrated Manager](#)

[Creating a Virtual PBX Service](#)

[Creating an Oracle IVR Integrator Service](#)

[Creating an Oracle IVR Integrator Monitor](#)

Setting Filters for Logs

The filters determine how and when alert messages are tracked and logged for all services and servers. Use this procedure to set the logging filters.

Prerequisites

A service must have been created and exists for IVR Integrator in Oracle Integrated Manager.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Inbound**.
2. Double-click **IVR Integrator Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.

5. Select **All Tasks**.

6. Select **Set Filter**.

The Set Filters for Log/Alerts screen will display. The Set Filters for Log/Alerts screen consists of two types of filter settings: Time Filters and Other Filters.

Note: Log filters apply to all services.

7. In the Time Filter box, enter the parameters as you want them to apply to the service. You can use the time filters to identify how you want to query the results of the logging activity.

8. If you do not want to set the filtering of logs by time, select the **No Time Filter** option.

9. If you want logs to be shown for a set number of hours, select the **Show Log/Alerts for Last Hours** option.

Select the value from the LOV. You may choose any number of hours between 1 and 24. Beginning with 24 hours, the setting is incremental by 24, up to 72 hours. The default is 24.

Or, if you choose, you can enter the desired number of hours in the **Show Log/Alerts for Last Hours** field.

10. If you want to filter by a date range and time, select the **Show Log/Alerts from and To** option.

Enter the date from which to begin or select the date from the LOV. When you select the LOV, the calendar feature will display for data selection.

Enter the time from which to begin showing logs or select the time. Click the hour and choose the up or down arrows in the field to increase or decrease the time by 1 hour. When you click the minute or second values, you can increase or decrease each by 1 minute or second respectively.

11. In the Other Filters box, enter the parameters as they apply to the filters being defined.

12. You can determine the severity level to be used as a filter. There are 5 levels:

- informational
- trace
- minor

- major
- critical

If you want to filter logs and alerts by severity level, select the **Show Log/Alerts with severity level greater than** option. Next, select a level from the LOV.

13. You can also filter logs and alerts based on action ID. When the action ID is equal to the selected action, the alert will display and be logged. The filter options are:

- log
- set alert
- clear alert
- clear all

14. If you want to set the filters by action ID, select the **Show Log/Alerts with action ID equals to** option. Next, select the action from the LOV.

15. The **Show Max** option is a required field with a default setting of 100. You can modify the number as required. You may enter any number of records from 1 to 1000.

16. Click **OK**.

References

[Activating Alerts](#)

Activating Alerts

Alert messages for all services are controlled from the Logs and Alerts node in Oracle Integrated Manager. When you activate alert messages, alerts will be monitored and captured for all services. Each alert message will display in a separate window. You also can stop the alerting feature through the Logs and Alerts node. Use this procedure to activate alert messages for all services.

Prerequisites

A service must have been created and exists for IVR Integrator in Oracle Integrated Manager.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Inbound**.

2. Double-click **IVR Integrator Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.
5. Select **All Tasks**.
6. Select **View Alerts**.

Note: When you enable the viewing of alerts, as alert messages are generated, they will display in a separate window for viewing.

7. Click **OK**.

References

[Setting Filters for Logs](#)

Administering Oracle IVR Integrator

This topic group provides task-based procedures for required for ongoing system maintenance and includes information on administration tools and utilities.

This topic group covers the following topics:

[Stopping Alerts](#)

[Viewing Log and Alert Properties](#)

[Viewing Log and Alerts](#)

Stopping Alerts

When it is necessary to stop alert messages, you can do so through the Logs and Alerts node in Oracle Integrated Manager. Use this procedure to stop alert messages for all services.

Prerequisites

A service must have been created and exists for IVR Integrator in Oracle Integrated Manager and the View Alerts option from the Logs and Alerts node must have been enabled.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Inbound**.
2. Double-click **IVR Integrator Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.
5. Select **All Tasks**.
6. Select **Stop Viewing Alerts**.

Note: Oracle Integrated Manager will stop displaying alert messages for all services.

7. Click **OK**.

References

[Viewing Log and Alert Properties](#)

[Viewing Log and Alerts](#)

Viewing Log and Alert Properties

The database and alert properties can be viewed for services from the Logs and Alerts node in Oracle Integrated Manager. Use this procedure view the log and alert properties.

Prerequisites

A service must have been created and exists for IVR Integrator in Oracle Integrated Manager.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Inbound**.
2. Double-click **IVR Integrator Services**.
3. Click the appropriate service.
4. Right-click **Log and Alerts**.
5. Select **All Tasks**.
6. Select **View Properties**.
7. Click **Database** tab.
8. Displays the following database properties.
 - TNS Name
 - Database User
 - Password

Note: All services use the same log and alert database setting. The parameters on the Database tab can only be viewed. They cannot be modified.

9. Click **OK**.
10. Click **Alerting** tab.
11. The number of seconds by which the system will check for alert messages will display. The default is 5 seconds. You can modify this number if required.
12. The Advanced Queuing box contains the following properties.
 - Queue Name
 - Queue Subscriber
 - Password

References

[Stopping Alerts](#)

[Viewing Log and Alerts](#)

Viewing Logs and Alerts

Alerts provide a real-time view of what is occurring in a service. When alerts are set to view, the log and the message details can be viewed. You can view alerts from the Alerts message window or from the Logs and Alerts node in Oracle Integrated Manager.

The alert records and message specifics will display in the Oracle Integrated Manager screen. Use this procedure view logs and alerts.

Prerequisites

A service must have been created and exists for IVR Integrator in Oracle Integrated Manager and alerts must have been logged for the service.

Steps

1. From the Oracle Integrated Manager navigation tree, double-click **Inbound**.
2. Double-click **IVR Integrator Services**.

3. Click the appropriate service.
4. Double-click **Log and Alerts**.
5. Click an alert to view.

The message details will display in Oracle Integrated Manager for viewing.

The following information types will display:

- Title
- Source
- Instance
- IP
- Host
- User
- Time Stamp
- Severity
- Action
- Details
- XML Data
- Record

References

[Stopping Alerts](#)

[Viewing Log and Alert Properties](#)