Oracle® CRM Foundation

Implementation Guide

Release 11*i*

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Oracle CRM Foundation Implementation Guide, Release 11*i*

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Send Us Your Comments

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via the postal service.

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Preface

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

This Implementation Guide provides information and instructions to help you work effectively with Oracle CRM Foundation.

This preface explains how this 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 implementation topics in the online help for Oracle CRM Foundation conpoments. It provides general descriptions of the setup and configuration tasks required to implement the Oracle CRM Foundation components successfully.

Related Documents

For more information, see the following manuals:

- *Oracle CRM Foundation Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Implementing Oracle CRM : ERP Functional Checklist* (available on Oracle MetaLink)
- *Implementing Oracle CRM : Foundation Functional Checklist* (available on Oracle MetaLink)

Implementing Oracle Foundation HTML Stack

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.

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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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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 Oracle Foundation HTML 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

Installation must be complete.

Steps

Perform the following steps to setup the HTML Stack.

Step Number	Required?	Oracle Foundation HTML Stack Setup Step Description	Window Name(s)
1	Yes	Log in as the System Administrator	Welcome
2	Yes	Set up a Guest user account.	Advanced > Properties
3	Yes	Register the guest user as a valid user.	Users > Create
4	Optional	Define new roles for the guest user.	Security> Permissions Security > Roles
5	Yes	Assign roles to the guest user.	Users > Assign Roles

Step Number	Required?	Oracle Foundation HTML Stack Setup Step Description	Window Name(s)
6	Yes	Assign Default Responsibilities to Business user and End user Assign Default Roles to Business User and End User	Setup > Default Responsibilities Setup > Default Roles

Logging in as System Administrator

The system administrator is the only pre-defined user that is provided with Oracle CRM Applications. Use this procedure to login to Oracle CRM Applications.

Steps

1. Open the Welcome window by entering its URL,
   http://<host>:<port>/<docroot>/JTFdefaultlogin.jsp

   host = where Apache Server is installed

   port = the port on which the Apache Web listener is configured

   docroot = the document root defined for the Apache Server
2. Enter sysadmin in the User ID field.
3. In the Password field, enter sysadmin.
4. Click **GO**.

Setting up a Guest User and Registering a Guest User

Oracle Marketing owns an API that sends news items to the login page of the System Administrator Console. This API delivers the news to the login page after you have defined at least one guest user. Perform the following steps to setup a guest user.

Note: The guest user's User Type must be either End User or Business User. When you select End User, the user id and password is automatically approved. When you select Business User, the System Administrator must approve the user id and password.

Steps

1. Login to the System Administrator Console as the sysadmin user.
2. Select the Advanced tab and click **Properties**.
3. Create the guest_username key with value set to the guest user's username.
4. Create the guest_password key with value set to the guest user's password.
5. Select the Users tab and click **Create**.

   The Create User page opens.
6. Enter information in the appropriate fields to identify the guest user and the guest user's password.
7. Click **Create** to complete the process.

   At this point you can assign a role to the guest user.

See also

Defining a New Role

Defining a New Role

You can define roles in addition to the pre-defined roles that come with the Oracle System Administrator Console. Use this procedure to define a role and map it to permissions.

Steps

1. Select the Security tab and click **Roles**.

   The Roles window displays all roles that have been defined. Role names are displayed in alphabetical order. The first two or three letters of the role name indicates the name of the module that the activity is associated with. Click **Next**, **Last**, **First** or **Previous** to review all the roles
2. Enter a new role name in an empty Name field.

The first two or three letters of the name should correspond to the two- or three-letter code of a module. Each role name must be unique.

3. Enter a description of the role in the Description field.
4. Click Update to complete the definition.

   The new role name is automatically filed in alphabetical order.
5. Find the new role is the list of role names and click the role name.

   The Role Mapping window opens to display two lists: Available Permissions and Assigned Permissions. The Role Name appears above the lists.
6. Select a permission from one list and click > or < to move it to the opposite list.
   - Click >> to move all Available Permissions onto the Assigned Permissions list.
   - Click << to move all Assigned Permissions onto the Available Permissions list.
7. Click **Update** to complete the role mapping.

Assigning Roles to the User

Use this procedure to assign roles with their associated permissions to the Guest user.

Steps

1. Select the User tab and click **Assign Roles**.

   A Search field appears on the window.
2. Enter the first one or two letters of the Guest user's name in the Search field and click **Search**.

   The search results show a list of user names that begin with the letters you entered. Click **Next**, **Last**, **Previous** or **First** to review all the user names in the list.
3. Click the user name to which you want to assign roles.

   The Role Mapping window opens to display two lists: Available Roles and Assigned Roles.
4. Select a role from one list and click > or < to move it to the opposite list.

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

5. Click Update to complete the task of assigning roles.

Assign Default Responsibilities and Default Roles

Registration allows two types of user:

- Business users– individuals who represent an organization
- End users–individuals who are not associated with an organization

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.

Steps

1. Select the Setup tab and click **Default Responsibilities**.

   The Register Default Responsibility window opens.

2. Choose a user type and enter the appropriate IDs.
3. Click **Submit** to complete the Default Responsibility setup.
4. Select the Setup tab and click **Default Roles**.

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

   Always use CRM_DOMAIN as the domain.

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

   The Groups window displays two lists: Available Roles and Assigned Roles.

6. 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 selected in step 3.

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

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

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_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.

	User can		**Admin Setting Levels**			
Required	**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	App	Site
X	X	X	X			X

Setting	Description and Usage Considerations
	The default value is JTFUCSS.CSS at sitelevel.

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.

	User can		Admin Setting Levels			
Required	**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.

	User can		Admin Setting Levels			
Required	**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.

	User can		Admin Setting Levels			
Required	**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.

	User can		Admin Setting Levels			
Required	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.

	User can		Admin Setting Levels			
Required	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.

	User can		Admin Setting Levels			
Required	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.

	User can		Admin Setting Levels			
Required	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

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

Workflows in Oracle Foundation HTML Stack

There are no Workflows associated with the HTML Stack.

Implementing Oracle Resource Manager

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.

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Related Documentation

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Implementing CRM Applications	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 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 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 Resource Manager responsibility, navigate to **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 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 Resource Manager responsibility, navigate to **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

Resource Role Boxes

Check Box	Action
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 Resource Manager Navigator, double-click CRM Resources to expand the node.
2. Select Groups and click **Open**.

   The Dynamic Groups window opens.
3. Define and enter a group name in the Name field.
4. Select a group usage from the Usage field.
5. Select the effective dates for the group from the list of values in the Start and End fields.
6. Enter a brief description of the group name and usage in the Description field.
7. 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

Setting 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 Oracle Notes

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*

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- *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 so that the user has a limited selection of task types. When you provide a list of values for the Note Type fields, note creators cannot enter an incorrect value because all note type options are pre-defined. Use this procedure to define note types.

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

To enable a note type, select Enabled for the corresponding note type row. Initially you can create the complete set of note types and enable 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.

- JTF_NTS_NOTE_STATUS

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

Profile Option JTF_NTS_NOTE_STATUS

Sets the default note status.

	User can		Admin Setting Levels			
Required	**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*

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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 in CRM Foundation online Help 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 Oracle Territory Manager

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

Document	Purpose
Implementing CRM Applications	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 Oracle Territory Manager

Prior to using Oracle Territory Manager, 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 Manager.

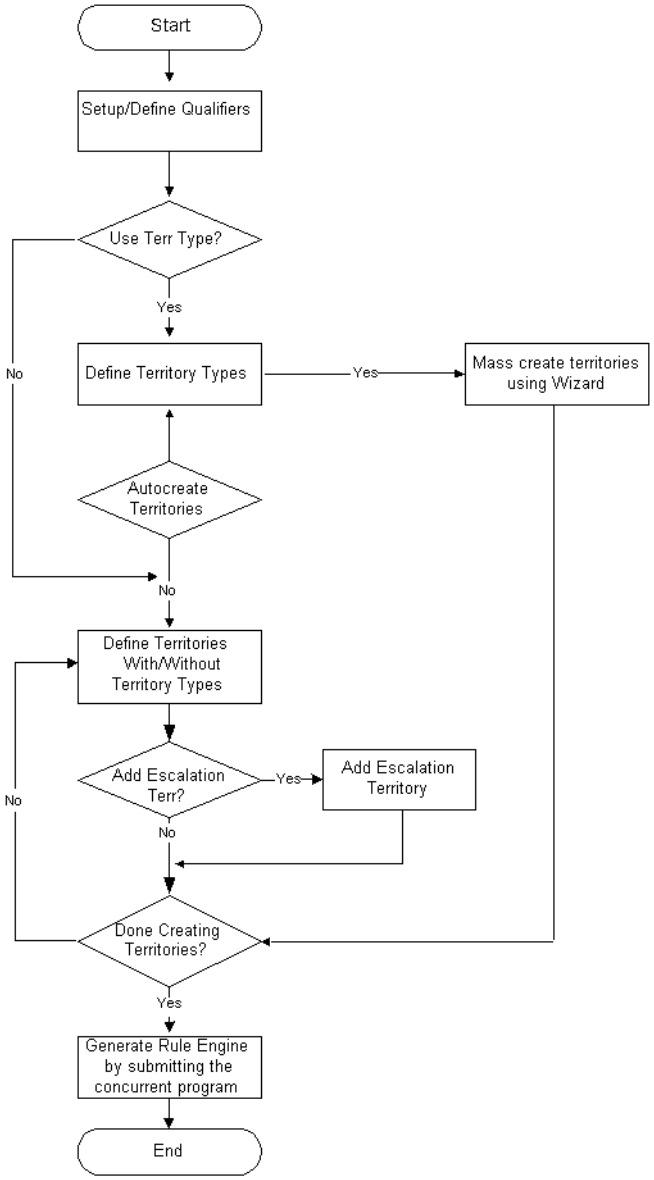
Step	Required?	Action	Window Name(s)
1	Yes	Set up and/or define qualifiers. By default, all qualifiers are disabled. Before you use a qualifier to define territories, you must enable the qualifier. Use the Setup Qualifier window to enable or disable qualifiers. You may also create your own qualifiers.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

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 Manager.

Territory Manager Set Up Flow Chart



Before setting up all your territories, set up two or three first. Genreate 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.

System Profile Options

Oracle Territory Manager 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 options sets the number of qualifying territories to return.

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

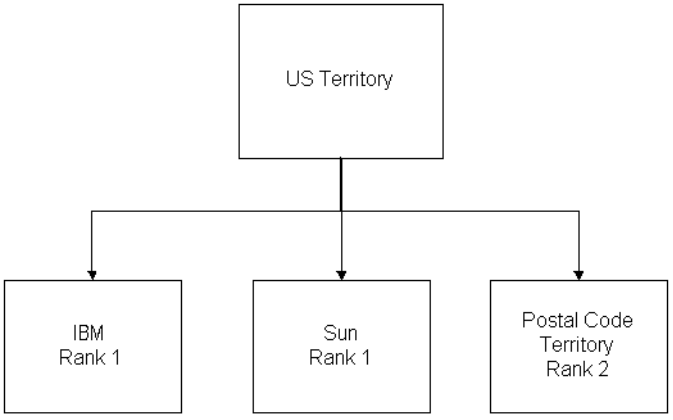
Setting	Description and Usage Considerations
Single Winner	Select the most qualifying territory.
Multiple Winner	Select all qualifying territories.
Note that selecting the Multiple Winner option can impact performance.	

The system profile option TERR: Multiple Winning Territories controls how Oracle Sales 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**: Oracle Sales assigns a transaction to all winning territories.
- **Single (the** default setting): Oracle Sales 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 Oracle Sales assigns the transaction to both territories.

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

Implementing Oracle Tasks

This topic group provides general descriptions of the set up 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*

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

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Implementing CRM Applications	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.

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

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 Priorityfor details.	Define Task Priorities

Step	Required?	Action	Window Name(s)
3	Optional	Create new Task Types if you want to customize task types. See Defining a Task Type for details.	Define Task Types
4	Optional	Use the status transition model to restrict the status assigned to a task depending on the responsibility. Set up the state transition model for each responsibility.	Define Task Statuses, click **Define Transition**
5	Optional	Create new task 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.	Define Date Types
6	Optional	Use templates if the same set of tasks are created repeatedly. See Designing Task Templates for details.	Define Templates

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.

Defining Task Status

Limit the user's task status choice by defining the list of status options and determining the employee type who has access to each type. Providing a list of values for the Task Status field prevents task creators from entering an incorrect

value, and gives them the flexibility to choose among a pre-defined template of status options. Use this procedure to define task status types 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

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 Type

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.

Designing Task Templates

Design a task template to assist the application user in creating tasks. When you create a template, you eliminate the user's interaction with the specific properties of a task. This 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

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*

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
Implementing CRM Applications	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 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, email, 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 crate 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 set up 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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Related Courseware

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

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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. When the HTML Stack is implemented, no further setup is required for Oracle 1-to-1 Fulfillment.

Step Number	Required?	Oracle 1-to-1 Fulfillment Setup Step Description	Window Name(s)
1	Yes	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 Oracle 1-to-1 Fulfillment server(s)	1-to-1 Fulfillment System Administration > Server
4	Yes	Define the resource groups for each output device and assign groups to servers	Fulfillment Administrator > Groups

Step Number	Required?	Oracle 1-to-1 Fulfillment Setup Step Description	Window Name(s)
5	Yes	Create and upload Master Document(s)	Fulfillment Administrator > Master Document > Upload
6	Yes	Associate Master Document with Template	Fulfillment Administrator > Template > Master Document
7	Yes	Set Up and Start the Fulfillment Server	Oracle Applications

Assign 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.

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 Consol, select the Users tab > Assign Roles.
3. Enter the user ID of the Oracle 1-to-1 Fulfillment administrator in the Search field and click **Go!**
4. Click the user ID to open the User-Role Mapping window.

   The Role Mapping window displays two lists: Available Roles and Assigned Roles.
5. Select the JTF_ADMIN role from the Available Roles list and click **>** to move it to the Assigned Roles list.
6. Click Update to complete the task of assigning the Administrator role to the Oracle 1-to-1 Fulfillment administrator.

Assign 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, exectute 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 Assign 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 select the Oracle 1-to-1 Fulfillment administrator's user ID from the list of values.
8. In the Profile list of values, enter JTF% and click **Find**.
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 Servers

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.

Note: Time format on the Server must be defined 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)
- 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

Enter a space between dd and HH.

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 Email Servers

- Configuring File Servers

Define Resource Groups and Assign 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 Email Servers

After you configure the fulfillment server, you can associate the e-mail server with the fulfillment server.

Prerequisites

You must have already created the server. To begin, see Define and Configure the Fulfillment Servers.

Steps

1. In the Email Servers screen, choose the **Add** button to add a new Email server.

   The Create Email Server screen opens.

2. In the fields, enter required information about the Email server that you want to add. In the Incoming and Outgoing server fields, enter the imap or smtp server names.

3. Choose **Save**.

   You return to the Email Servers screen.

4. To add more Email servers, repeat steps 1, 2 and 3.

Configuring Fax Servers

WARNING: Screens relating to either print or fax functionality or capability are not supported, and should not be used.

Configuring File Servers

After you create a fulfillment server you can associate a file server with the fulfillment server. Follow this procedure to configure a file server.

Prerequisites

You must have already created the fulfillment server. To begin, see Define and Configure the Fulfillment Servers.

Note: The fulfillment server creates a file for each request. The filename reflects the request identity. Do not enter a filename in the directory field.

Steps

1. On the Servers tab, click the name of the Fulfillment server to which you want to associate a file server.

   The General window opens and displays a list of server types on the left side of the window.

2. Click **File Servers**.

The File Servers window displays fields labeled Directory and Description.

3. In the Directory field, enter the full path to the server which you want to associate to the Fulfillment server.

   Optionally, you may enter a description in the Description field. The server can create any directory structure that you enter, even if it does not currently exist.

4. Click **Update** to complete the association.

Guidelines

Only one file server can be configured for a fulfillment server.

If a group is associated to a a fulfillment server, all agents that belong to that group have accesss to the file server that is associated to the server. See Creating Groups for Servers.

When you resubmit a request for a file server, the new request will erase and replace the pre-existing request file.

Configuring Printers

WARNING: Screens relating to either print or Fax functionality or capability are not supported, 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.

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.

Upload Master Documents

A Master Document contains text that is used repeatedly, such as a form or a contract. You create Master Documents on a word processing application. A Master Document may have one of the following extensions:

- .zip
- .html

After you have created a Master Document, you upload it into Oracle 1-to-1 Fulfillment. Use the following procedure to upload a Master Document.

Note: If the Master Document in HTML was originally created in Microsoft Word, you must use the Notepad or an HTML text editor to remove information that is proprietary to Microsoft from the HTML header.

Prerequisites

One or more Master Documents must exist.

Steps

1. In the 1-to-1Fulfillment Administrator Console, choose the Template tab and then click **Master Document**.
2. Click **Upload** in the top of the window.

   The Upload Master Document window opens.
3. Click **Browse** to find the Master Document you want to upload.
4. When the Filename field contains the name of the Master Document, click **Upload**.

Associate a Master Document to a Template

A template is a pre-defined package of brochures, newsletters, or other customer-oriented information that an agent locates and directs to customers in answer to a fulfillment request. Use the following procedure to associate one or more Master Documents to a template.

Prerequisites

One or more Master Documents must exist be available in the list of Master Documents.

Steps

1. In the Fulfillment Administrator Console, choose the Template tab.

   The View Template window opens.
2. Click a template name.

   The template details window opens.
3. Click **Master Document** in the left frame.

The View Template, Master Documents window opens.

4. Choose **Go** to begin a search of master documents.
5. In the Master Documents window, enter the initial letter of a master document with % and click **Search**.
6. Click on the name of the Master Document.

   The selected Master Document is now associated with the Template.

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.

Steps

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
   ```

   `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 communicatelwith 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

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.

	User can		Admin Setting Levels			
Required	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.

	User can		Admin Setting Levels			
Required	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.

	User can		Admin Setting Levels			
Required	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.

	User can		Admin Setting Levels			
Required	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.

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

Profile Option JTF_FM_REFRESH_RATE

Description of profile option.

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

Workflows in Oracle 1-to-1 Fulfillment

Oracle 1-to-1 Fulfillment resides in lhe CRM Foundation area. The application that uses Oracle 1-to-1 Fulfillment can use four pre-defined workflows in jtffinwf2.wft.

Implementing Oracle Assignment Manager

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*
- *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	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.

Required	User can		Admin Setting Levels			
	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 Oracle Escalation Manager

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*
- *Oracle Workflow Guide*

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

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Setting Up Oracle Escalation Manager

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. A user called JTFBRM must be defined to ensure that an owner of the Workflow process exists and that the notifications can be sent successfully.

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

Step Number	Required?	Oracle Escalation Manager Setup Step Description	Window Name(s)
1	Yes	Define the JTFBRM user	Define Application User
2	Yes	Start the Workflow Background Processes	System Administrator > Requests > Run
3	Yes	Start the Business Rule Monitor	CRM Administrator > Business Rule Monitor > Business Rule Monitor

Step Number	Required?	Oracle Escalation Manager Setup Step Description	Window Name(s)
4	Optional	Define a Business Rule	CRM Administrator > Business Rule Monitor > Business Rule Workbench

Defining the JTFBRM User

Automated escalations in Oracle Escalation Manager are triggered by Workflow processes. JTFBRM user is the user who has responsibility for managing the Workflow processes. Escalations in Oracle Escalation Manager are triggered by Workflow processes. Use the following procedure to define the JTFBRM user.

Prerequisites

The user who will be designated as the JTFBRM user must be registered with a user ID and password.

Steps

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

   The Users window displays fields you use to define the user.

2. Enter JTFBRM in the User Name field.

   The exact user name is JTFBRM.

3. Enter the JTFBRM user's password in the Password field.

4. Choose Workflow User and Workflow Administrator from the Responsibility list of values.

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

Start the Workflow Background Processes

Proper operation of the Business Rule Monitor requires four Workflow background processes:

- Business Rule Monitor Main Process
- Business Rule Monitor Task Process

- Business Rule Monitor Service Request Process
- Business Rule Monitor Defect Process

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 Tab key on your 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 Tab key on your 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**.

7. Leave the Minimum Threshold and Maximum Threshold fields empty.

8. Enter Yes in the Process Deferred field, enter No in the Process Timeout field and click **OK**.

   The Submit Request window appears in front.

9. Click Schedule on the Submit Request window.

   The Schedule window appears in front.

10. Select Run the Job...Periodically.

    More options appear for defining the periodicity.

11. Define the Start time and the End time.

Note: Be sure to define an End time. When the End time field is blank, the process runs indefinitely and cannot be shut off.

12. In the Rerun Every fields, enter the number of minutes that defines the interval between job runs.
13. Select the From the Completion of the prior run box.
14. Click **OK.**
15. Repeat this entire procedure for each of the four Workflow background processes.

Guidelines

As a test, allow these background processes to run for a while. When you are satisfied with their performance, you can modify the parameters to adapt to the needs of your enterprise.

Set up Notifications in Oracle Workflow to ensure that notifications are sent to email.

Start the Business Rule Monitor

The Business Rule Monitor monitors the Workflow processes. In the Business Rule Monitor, you indicate how often the monitor checks the rules. Use this procedure to start the Business Rule Monitor.

Prerequisites

The four Workflow background processes for the Business Rule Monitor must be started. If you have designed customized Workflow background processes, they must also be started.

Steps

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

   The Business Rule Monitor opens.

2. Enter a number in the Interval field, enter a time unit–minutes or hours–in the UOM field.

3. Click **Save**.
4. Click **Start** to start the monitor.

   A Note tells you that the Business Rule Monitor was started successfully. The Item Key field and the Status field display values.

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.

Define a Business Rule

In addition to the pre-defined business rules provided with Oracle Escalation Manager, 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 Rule Workbench**.

   The Business Rule Workbench opens.
2. Enter values in the Name, Object, Check Rule Every, Effective, and Workflow fields to define the business rule, its effectivity dates and the action that will be carried out.

   You can also define attributes for the Workflow and an Owner for the business rule.
3. Use the Simple lines to define the conditions under which the business rule is triggered.

   The lines define a sequence of conditions.
4. Click **Validate** to check the syntax of the conditions you've defined in the Simple lines.

   The syntax check will tell you whether or not the syntax works.

5. When the syntax of the defined conditions is validated, click **Generate**.

Escalation Territories

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

Escalation Territories

Creating Individual Territories

Foundation Lookup Codes

Set up Escalation foundation lookup codes. The suggested lookup codes for Escalation Reason and Escalation Level are:

- JTF_TASK_ESC_LEVEL
- JTF_TASK_REASON_CODE
- JTF_TASK_CONTACT_TYPE
- JTF_TASK_REFERENCE_CODES

Lookup Code JTF_TASK_ESC_LEVEL

Sets escalation levels.

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

Lookup Code JTF_TASK_REASON_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

Sets contract types.

Code	Meaning
CUST	Customer
EMP	Employee

Lookup Code JTF_TASK_REFERENCE_CODES

Sets reference codes for the task.

Code	Meaning
ESC	Escalation
FYI	For your information

Setting Up Escalation Status

There are three pre-defined Escalation Statuses: Open, Working, and 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 Types

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 escalated.

You can add other Escalation Reference type 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.

Defining Escalation Reference Types

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 escalated.

You can add other Escalation Reference type 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.

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	Open
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)	Yes
Default Customer Contact Point	Phone

Escalation Management Profile Settings

Profile Option	Value
Default New Note Type	General
Default Employee Contact Point	Work
Close Only When De-escalated (Y/N)	Yes

Workflows in Oracle Escalation Manager

There are five predefined workflow item types:

- 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
- JTFEC-Reactive Escalation Notification

The first item type 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 screen. The last workflow item type is used for reactive escalation management.