Oracle® Marketing Online

Implementation Guide

Release 11*i*

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Oracle Marketing Online Implementation Guide, Release 11*i*

Part No. A87328-01

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Implementing Oracle Marketing Online

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Preface

This Implementation Guide provides information and instructions to help you implement Oracle Marketing Online, Release 11*i*.

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

Intended Audience

This guide is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle ERP applications only. You must have an understanding of Oracle ERP applications before proceeding.

How Implementation Topics are Organized

The implementation topics in this guide are grouped in a multi-level hierarchy giving different levels of detail on the steps of your implementation.

The Major Implementation Steps topic lists the major steps in your implementation. Many of the steps are linked to procedures that give you more detail. The steps in these linked procedures may, in turn, be linked to yet other more detailed procedures.

Each step in major procedures is labeled as either optional or required. Required steps are those you must perform for the application to run properly.

The topics are optimized for online delivery. This means that this guide is best read in the PDF format. Printing this document makes it impossible for you to follow the hyperlinks between topics.

Related Documentation and Resources

The following documents are referenced in this manual.

Oracle Applications User Interface Standards for Forms-based Products (A75395-01)

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Applications Concepts (A82932-01)

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind and major issues for applications-wide features such as Business Intelligence (BIS), languages, character sets, and self-service applications. It also describes Forms-based and HTML-based products.

Oracle Applications System Administrator's Guide (A75396-02)

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing. It also includes information relevant for setting up dbc files for Oracle Web Discoverer.

Oracle Pricing User's Guide (A77032-01)

You will need this guide to set up pricing features of the Oracle Marketing Online.

Oracle System Administrator's Guide (A75396-01)

The Implementation Appendix of this guide gives valuable information on implementing Oracle applications.

Implementing CRM Applications Release 11i (A85301-01)

This guide outlines the steps required for implementing the Oracle Marketing Encyclopedia System.

CRM Foundation Implementation Guide (A86122-01)

This guide outlines the steps required to implement the foundation components of the CRM suite of applications.

Oracle Inventory User's Guide (A83505–01)

This guide outlines the implementation steps required to set up Oracle Inventory.

Discoverer 3i Installation & Administration Guide Release 3.3 for the Web (A66104-02)

This guide outlines the implementation steps for Oracle Web Discoverer.

BIS11i Implementation Guide (A77481-02)

This guide outlines the steps required to create the End User Layer (EUL) and import EUL Export File (EEX) for Oracle Web Discoverer.

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Implementing Oracle Marketing Online

The implementation topics in this chapter explain how to set up and customize Oracle Marketing Online.

Some of the ways you can customize Oracle Marketing Online are by setting up system profile options, which control the overall behavior of the product, and by setting up lists of values (LOVs) and drop-down lists for individual fields within the product.

The choices users see in the LOVs and drop-down lists come from two sources:

- Lookups you set while logged in to the Oracle Forms interface under the Oracle Marketing Administrator responsibility.

- Setups you perform in the Admin tab of Oracle Marketing Online.

For this reason, you must log into both Oracle Applications under the Oracle Marketing Administrator responsibility (this is the Forms-based interface) and the Oracle Marketing Online application (HTML interface).

Major Implementation Steps

Below are the major steps to complete an Oracle Marketing Online implementation. Use this procedure to plan out your implementation. Each step indicates whether it is required or not. Follow links to more detailed procedures.

Prerequisites

Complete installation of the CRM suite as described in:

- *Oracle System Administrator's Guide* (A75396-01), Implementation Appendix

- *Implementing CRM Applications Release 11i* (A85301-01), Marketing Applications

Steps

1. Set up an implementation user. (Required)

2. If you are implementing a new installation of Oracle Marketing Online in an environment where Oracle ERP applications are not implemented, then you must set up basic ERP functions before implementing the application itself. (Required)

3. Log into Oracle Applications under the Oracle Marketing Administrator responsibility (this is the Forms-based interface). (Required)

4. Log into the Oracle Marketing Online application (this is an HTML interface accessed through your browser). (Required)

   Throughout the implementation you will be switching between the Forms-based Oracle Marketing Administration application, which you use to set up system profiles and lookups and the HTML-based Oracle Marketing Online application itself, where most of the setup is done in the Admin tab.

5. Set up CRM foundation modules. (Required)

6. Create Oracle Marketing Online users. These users are the owners of different objects in the application. Objects include events, collateral, and campaigns.

7. Set Oracle Marketing Online lookups. (Required)

8. Set up status classifications. These are the drop-down lists that can be used to classify most Oracle Marketing Online objects, including campaigns, events, and deliverables. (Required)

9. Create category and subcategory classifications for campaigns, deliverables, events, budgets, metrics, and costs. (Optional)

10. Enable the budget tab. (Required)

11. Set up the campaign tab. (Required)

12. Set up metrics and costs for your campaigns and events. (Required)

13. Create venues for your events. (Required)

14. Set up the data fields to restrict the number of columns available for list generation. (Optional)

15. Set up deduplication rules. (Required)

16. Set up word replacement rules. These are lists of similar words used to identify duplicate records in lists. (Required)

Setting Up the Implementation User (Required)

Use this procedure to set yourself up as a user for the implementation.

Prerequisites

None

Steps

1. Log in as Sysadmin.

2. Navigate to **Security > User >Define**.

3. Create a user. (For example: <IMPLEMENT>)

4. Assign the following responsibilities to the user:

- General Ledger Super User
- US HRMS Manager
- Inventory
- CRM Administration
- Oracle Marketing Administration
- Oracle Marketing Super User (Self Service)
- Preferences (Self Service)
- System Administrator

5. Log out and log in as <IMPLEMENT>.

6. Change your password.

Setting Up ERP Applications for New Installations (Required)

Use this procedure to set up ERP applications for use with Oracle Marketing Online in new installations. This procedure covers only steps required to make ERP applications work with Oracle Marketing Online, not the steps required to implement those applications.

Steps

1. Set up Oracle General Ledger. (Required)

2. Set up Oracle Human Resources. (Required)

3. Set up Oracle Inventory. (Required)

4. Set up Advanced Pricing following the instructions specified in *Oracle Pricing User's Guide* (A77032-01). (Required)

Implementing Oracle General Ledger (Required)

Prerequisites

Knowledge of setting up Key Flexfields is a must.

Steps

1. Log in as the <IMPLEMENT> user.

2. Choose the General Ledger responsibility.

3. Set up accounting calendar types (**Setup > Financials > Calendars > Types**).

4. Set up the accounting calendar (**Setup > Financials > Calendar >Accounting**)

5. Set up currencies (**Setup > Currencies > Define**) that are needed for your implementation.

6. Set up exchange rates. (**Setup > Currencies > Rates > Daily**)

7. Set up accounting flexfields (**Setup > Financials > Flexfields > Key > Segments**).

   Make sure the concurrent process for flexfield compilation is complete before proceeding further.

8. Define a set of books (**Setup > Financial > Books > Define**).

9. Use SqlPlus to check your Set of Books (SOB) under table GL_SETS_OF_ BOOKS.

Implementing Oracle Human Resources (Required)

Prerequisites
You must complete your implementation of Oracle General Ledger.

Steps
1. Switch Responsibility to US HRMS Manager.

2. Define Org Types (**Other Definitions > Lookup Tables**). Org Types can be Business Group, Department, HQ, or any other types suited to your business needs.

3. Define locations (**Work Structures > Location**). These are used to set up organizations in the next step.

4. Define organizations (**Work Structures > Organization > Description**). In the Organization Classifications region, assign business groups.

5. Use SqlPlus to check your work and make a note of your ORGANIZATION_ID and BUSINESS_GROUP_ID from table HR_ALL_ORGANIZATION_UNITS.

6. Switch responsibility to System Administrator.

7. Set the site level value for profile option HR: Business Group to one of the new business groups defined above.

8. Set the responsibility-level (US HRMS Manager) value for profile option HR: Business Group to one of the new business groups defined above.

9. Set the site-level value for profile option HR: Security Profile to one of the new business groups defined above.

10. Set the responsibility-level (US HRMS Manager) value for profile option HR: Security Profile to one of the new business groups defined above.

11. Switch responsibility to US HRMS Manager.

> **Note:** A single Organization can act as a business group, a legal entity and an operating unit. Please be very clear before starting this setup.

12. Define Legal Entity (**Workstructure > Organization >Description**):

   a. Associate the GRE/Legal Entity classification with your organization and continue with additional setups as needed.

   b. Enter the set of books.

13. Double check your work:

   a. Under **Help > Diagnostics,** examine for block HOU1 and field BUSINESS_GROUP_ID.

   b. Verify the value of BUSINESS_GROUP_ID for block $PROFILES$ and field PER_BUSINESS_GROUP_ID,

   c. Verify the value of BUSINESS_GROUP_ID.

14. Define your operating unit (**Workstructure > Organization >Description**)

   a. Associate the Operating Unit classification with your organization and continue with additional setups needed.

   b. Enter the legal entity.

   c. Switch to the Sysadmin responsibility.

   d. Change the site level profile option for MO: Operating Unit to the operating unit you defined.

15. Switch to the HR responsibility.

16. Define the HR Organization (**Workstructure > Organization > Description**)

   a. Associate the HR Organization classification with your organization.

17. Define Inventory Organization (**Workstructure > Organization > Description**)

   a. Associate the Inventory Organization classification.

   b. Click **Others**.

   c. In Accounting Information, enter the legal entity, the set of books, and the operating unit created earlier.

   d. Use SqlPlus to double-check data in tables HR_ALL_ORGANIZATION_UNITS, HR_ORGANIZATION_INFORMATION, HR_LEGAL_ENTITIES, and HR_OPERATING_UNITS.

18. If you wish to enable multi-organizational features for new installations, then run the Adadmin concurrent program to enable Multi-Org at site level. Adadmin will pick the MO: Operating Unit profile value set at the site level.

19. If you are implementing a new installation you must create employees:

    a. Define the employee. (**People > Enter and Maintain**)

    b. Define the manager of the employee by clicking **Assignment**. This step also assigns the employee to an organization. The manager's organization must be one of an HR business groups you have defined previously.

> **Note:** You must enter the manager for an employee for Oracle Marketing Online Workflow approval to work correctly. If you are creating a new business group instead of using the seeded business group, and if you receive the flexfield error (Code = GRP), then you must set up the People Group flexfield.

20. Set up a Business Unit:

    a. Navigate to **US HR MANAGER->Other Definitions->Look Up Tables.**

    b. In the Look Up Tables form, search for and set up values for ORG_TYPE.

    c. In the CODE field for ORG_TYPE, enter the value `BU` (This is the key).

    d. In the meaning field enter the value `Business Unit` and a free-form description.

    e. As an option, you may also define Company with the code `COMP` and Department with the code `DEPT`.

    f. After you have defined your ORG_TYPE, you must describe your ORG_TYPE. This is done by navigating to **US HR MANAGER->Work Structures->Org.-> Description**.

    g. Once you have opened the Description form, select the New tab.

    h. In the Name field, enter the business unit name. For example, Business Computer Organization.

    i. Using the Type list of values, select the Business Unit that you defined previously.

    j. Enter an address.

    k. Save the record.

Implementing Inventory (Required)

You must implement Oracle Inventory using this procedure if you wish to make marketing deliverables and events available through other CRM applications, including Oracle iStore and Oracle TeleSales.

Only the steps listed here are required to set up Oracle Marketing Online for use with Oracle Inventory. For more details on how to carry out these steps, please see *Oracle Inventory User's Guide* (A83505–01).

Prerequisites

You must complete your implementation of Oracle General Ledger.

Steps

1. Switch Responsibility to Inventory.

2. Define the Item Flexfield (**Setup > Flexfields > Key > Segments**).

3. Make sure you compile each flexfield before preceding to the next step.

4. Define the Item Categories flexfield (**Setup > Flexfields > Key > Segments**).

5. Define the Item Catalog Group flexfield (**Setup > Flexfields > Key > Segments**).

6. Define the Stock Locator flexfield (**Setup > Flexfields > Key > Segments**).

7. Define Sales Orders flexfield (**Setup > Flexfields > Key > Segments**).

8. Define locations (**Setup > Organization > Location**).

9. Define the organization calendar (**Setup > Organization > Calendar**).

10. Switch responsibility to System Administrator.

11. Set the value at the responsibility level for Profile Option (HR:User Type) to `HR User`.

12. Switch responsibility to Inventory.

13. Define the inventory organization (**Setup > Organization > Organization**).

14. Define the organization parameters (**Setup > Organization > Organization Parameter**). You can do this by clicking **Others** in the previous step).

15. Change the organization (**Setup > Change Organization**).

16. Define Unit of Measure Classes (**Setup > Unit of Measure > Classes**).

17. Define the Unit of Measure (**Setup > Unit of Measure > Unit of Measure**).

18. Define Unit of Measure conversions (**Setup > Unit of Measure > Conversions**).

19. Define category codes **(Setup > Items > Categories > Category Codes**).

20. Define category sets (**Setup > Items > Categories > Category Sets**).

21. Define default category sets (**Setup > Items > Categories > Default Category Sets**).

22. Log in as a System Administrator.

23. Set the following system profile options at the application level:

    - INV: Default Primary Unit of Measure

    - INV: Accounting Category Set

    - INV: Item Master Flexfield

    - INV: Product Family Item Template Name

24. Log in under the Marketing Administrator responsibility.

25. Set the following system profile options at the site level:

    - AMS: Item Validation Master Organization

    - AMS: Pricelist Header Name for Events.

    - AMS: Should Call to Inventory Module. Set to Y.

    - AMS: Should Call to Pricing Module. Set to Y.

Setting Up CRM Foundation Modules (Required)

1. You must set up the following modules in CRM Foundation:

- **Resource manager types:** You must set up people and venues.

- **Resource manager roles**: These are used in execution events for the Resource check-list attribute.

- **Note types**: These are used in the Notes check-list attribute in the field Note Types.

- **Source to Note-Type Mapping**: This determines which notes show up in the Note check-list attribute under campaigns, events, deliverables, messages, and all of the other Oracle Marketing Online objects.

- **Task types**: These appear in the Task Type drop-down list.

- **Task status:** The values you add here determine what appears in the Status drop-down list for tasks.

- **Task priority**: This determines the values that appear in the Priority drop-down list for tasks.

2. Import geographic hierarchies (Required):

    a. Log into Oracle Applications under the CRM Administration responsiblity.

    b. Run the concurrent program Load Geographic Hierarchies.

Guidelines

Refer to the corresponding topic in *CRM Foundation Implementation Guide* (A86122-01). You can find relevant information in these topics:

Information Sources for CRM Setups

CRM Foundation Module	CRM Foundation Concepts Topic
Resource Manager Roles	Understanding Resource Manager
	Implementing Resource Manager
Note Types	Implementing Notes
Task Type	Implementing Task Manager
Task Status	
Task Priority	

Creating Oracle Marketing Online Users (Required)

Use this procedure to create users for Oracle Marketing Online. These are referred to in the application as owners. The procedure for creating users requires two additional steps beyond the usual procedure of setting up users in the Oracle Human Resources application.

Prerequisites

None

Steps

1. Log on as the implementer.

2. Choose the responsibility: Human Resources.

3. Create an employee.

    a. Navigate to **People > Enter and Maintain**.

    b. Make sure Person Type is Employee.

    c. Enter all other required fields.

4. Switch to the System Administrator responsibility.

5. Create Oracle Marketing Online users:

    a. Create a user.

    b. Assign Oracle Marketing Super User as the responsibility.

    c. Assign the newly created person in the Person field.

    d. Open the System Profile Values window.

    e. Set up the following Profile options for the user:

        *   ICX_LANGUAGE. Must be set to your language, for example, American English.

        *   JTF_PROFILE_DEFAULT_APPLICATION: Enter "530". This takes users directly to Oracle Marketing Online when they sign on.

        *   JTF_PROFILE_DEFAULT_RESPONSIBILITY: Enter "21706"

        Note: The DEFAULT_APPLICATION and DEFAULT_ RESPONSIBILITY values are important because they determine the menu structure that is displayed when the user logs in. If you want your application menus to launch when the user logs in, then you must set the default application to your appID and default responsibility to the respID that maps to the menu structure.

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6. Import the employee as a resource:

    a. Switch to the CRM Administrator responsibility.

    b. Navigate to **Maintain Resource > Import Resources.**

    c. In the Name field, enter the employee you have created.

    d. Click **Search.**

e. Click **Create Resource.**

f. Click **OK**.

g. Click **Save Resources.**

h. Click **Details** to verify the User ID you created.

Setting Up Oracle Marketing Online Lookups (Required)

Oracle Marketing Online includes lookups with three different levels of modification:

- **System**: The implementer can only change the wording of a list of value (LOV) choices the user sees on the screen. No deletions or additions are allowed.

- **Extensible**: The implementer can change both the wording of the LOV choices and add new choices for the user.

- **User**: The implementer can change the lookup completely, deleting and adding LOV choices at will.

The lookup table in this section lists the three different types of lookups alphabetically. Included are their seeded values, navigation paths, and the names of the fields they affect.

About Navigation Paths in the Lookup Table

The navigation paths are included to give you an idea what areas of the application are affected by each lookup. Some lookups may affect a field that is found in multiple tabs. Not all of these are covered. Other lookups affect check-list attributes for campaigns and events and require you to navigate through a campaign or event you have created. You may not be able to navigate to that attribute through every campaign or event because which attributes appear depends on the way you implement custom setups.

Here is how to read the navigation paths in this table:

- Campaign > *any campaign* > Schedule

  Navigate to the Campaign tab, drill down on any campaign, select the Schedule check-list attribute.

- Event > Execution Event > *any execution event* > Registration

  Navigate to the Event tab, select the Execution Event subtab, drill down on any execution event, and select the Registration check-list attribute.

■ Campaign > Rollup or Execution Campaign > *any campaign* > Offers > *lump-sum offer*

Navigate to the Campaign tab, select either the Rollup Campaign or Execution Campaign subtab, drill down on any campaign that has a Offers attribute, select the Offers attribute, and create a lump-sum offer or examine the details of an existing one.

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_ACCESS_TYPE	GROUP	Team	Campaign > any campaign > Team	User/Role	System
	USER	User			
AMS_APPROVAL_TYPE	BOTH	Theme and Budget Approval	Admin > Custom Setup	Enables one or both of the following fields: Theme Approval, Budget Approval	System
	BUDGET	Budget			
	THEME	Theme			
AMS_ATTACHMENT_TYPE	FILE	File	Attachment check-list attribute used in all tabs.	Type (Classification for attachments)	Extensible
	URL	URL			
AMS_BUDGET_APPROVAL	APPROVED	Approved	Budget > any budget	Status (of budget)	User
	CLOSED	Accounting Closed			
	NEW	Planning			
	PENDING	Pending Approval			
	REJECTED	Rejected by Approver			
AMS_BUDGET_TRANS_TYPE	CREDIT	Credit	Budget > any budget	Specifies whether posting to General Ledger is a credit or a debit.	User
	DEBIT	Debit			
AMS_CAMPAIGN_PURPOSE	AWARENESS	Awareness	Campaign > any campaign > Purpose	Purpose	Extensible
	LEAD	Lead Generation			
	LEAD_MATURATION	Lead Maturation			
	SALES_READINESS	Sales Readiness			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_CAMPAIGN_ SCHEDULE_STATUS	ACTIVE	Active	Campaign > *any campaign* > Schedule	Status	System
	ARCHIVED	Archived			
	BOOKED	Booked			
	CANCELLED	Cancelled			
	COMPLETED	Completed			
	NEW	New			
AMS_CAMPAIGN_STATUS	ACTIVE	Active	Campaign > *any campaign*	Status	System
	ARCHIVED	Archived			
	AVAILABLE	Available			
	CANCELLED	Cancelled			
	COMPLETED	Completed			
	DENIED_BA	Denied - Budget Approval			
	DENIED_TA	Denied - Theme Approval			
	NEW	New			
	ON_HOLD	On-hold			
	PLANNING	Planning			
	SUBMITTED_BA	Submitted - Budget Approval			
	SUBMITTED_TA	Submitted - Theme Approval			
AMS_CHANNEL_RATING	BAD	Bad	Admin > General > Marketing Medium	Rating	Extensible
	EXCELLENT	Excellent			
	GOOD	Good			
	MODERATE	Moderate			
	VGOOD	Very Good			
AMS_CHANNEL_TYPE	EXTERNAL	External	Admin > General > Marketing Medium	Type	System
	INTERNAL	Internal			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_DELIV_STATUS	ARCHIVED	Archived	Campaign > *any campaign* > Deliverable> *any deliverable*	Status (deliverable)	System
	AVAILABLE	Available			
	CANCELLED	Cancelled			
	DENIED_BA	Denied - Budget Approval			
	NEW	New			
	SUBMITTED_BA	Submitted - Budget Approval			
	SUPERCEDED	Superseded			
AMS_DELIVERY_MEDIA_ TYPE	ISEMINAR	iSeminar	Event > Execution Event > *any execution event*	Delivery Method	Extensible
	ON_SITE	On Site			
	WEB	Web			
AMS_EVENT_AGENDA_ STATUS	CONFIRMED	Confirmed	Event > Execution Event > *any execution event* > Agenda	Status (event agenda)	System
	UNCONFIRMED	Unconfirmed			
AMS_EVENT_ ATTENDANCE_FAILURE	AGENDA_ CHANGE	Agenda Change	Event > Execution Event > *any execution event* > Registration > View Reason (View Reason is a hyperlink on the Registration attribute)	Reason	Extensible
	DISASTER	Natural Disaster			
	PERSONAL_ EMERGENCY	Personal Emergency			
	SCHEDULE_ CONFLICT	Schedule Conflict			
	SPEAKER_ CHANGE	Speaker Change			
	VENUE_ CHANGE	Venue Change			
	WORK_ EMERGENCY	Work Emergency			
AMS_EVENT_CERT_ CREDIT_TYPE	GENERAL	General	Event > Execution Event > *any execution event* > Registration	Credit Type	User

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_EVENT_DAY	FIVE	5	Event > *any rollup or executive event* > Event Agenda	Day	System
	FOUR	4			
	ONE	1			
	THREE	3			
	TWO	2			
AMS_EVENT_PAYMENT_STATUS	COMP	Complimentary	Event > Execution Event > *any execution event* > Registration	Marketing Event Payment Status	System
	FREE	Free			
	INVOICED	Invoiced			
	PAID	Paid			
	REFUNDED	Refunded			
AMS_EVENT_REG_STATUS	CANCELLED	Cancelled	Event > Execution Event > *any execution event* > Registration	Status (event registration)	System
	ENROLLED	Enrolled			
	REGISTERED	Registered			
	TARGETED	Targeted			
	WAITLISTED	Wait-listed			
AMS_EVENT_RESOURCE_TYPE	AMS_PEOPLE	People	Event > Execution or Rollup Event > *any event* > Resources	Type	System
	AMS_VENUES	Venues			
AMS_EVENT_SPEAKER_STATUS	BOOKED	Booked	Event > Execution Event > *any execution event* > Event Agenda	Status (speaker)	System
	CANCELLED	Cancelled			
	CONFIRMED	Confirmed			
	SCHEDULED	Scheduled			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_EVENT_STATUS	ACTIVE	Active	Event	Marketing Event Status	System
	ARCHIVED	Archived			
	AVAILABLE	Available			
	CANCELLED	Cancelled			
	CLOSED	Closed			
	DENIED_BA	Denied Budget Approval			
	DENIED_TA	Denied Theme Approval			
	NEW	New			
	ON_HOLD	On Hold			
	PLANNING	Planning			
	SUBMITTED_BA	Submitted Budget Approval			
	SUBMITTED_TA	Submitted Theme Approval			
AMS_EVENT_STREAM_TYPE	A	A	Event > Rollup or Execution Event > *any event* > Event Agenda	Track	Extensible
	B	B			
	C	C			
	D	D			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_EVENT_TYPE	BRIEFING	Briefing	Event	Type	System
	CONFERENCE	Conference			
	EXHIBITION	Exhibition			
	HOSPITALITY	Hospitality			
	INTERNAL_ EVENT	Internal Event			
	LAUNCH	Launch			
	SEMINAR	Seminar			
	SPEAKING_ ENGAGEMENT	Speaking Engagement			
	SPONSORSHIP_ EVENT	Sponsorship			
	TRADE_SHOW	Trade Show			
	WEB_SEMINAR	Web Seminar			
	WORKSHOP	Workshop			
AMS_EVENT_WAITLIST_ ACTION	FIRST_COME_ FIRST	First Come First	Event > Execution Event > *any execution event* > Registration	Rule (for wait list)	System
AMS_FCAST_BASE_UOL_ SOURCE			For N-tier marketing applications only. Affects budgets and claims.		
AMS_FCAST_PERIOD_ VIEW			For N-tier marketing applications only. Affects budgets and claims.		
AMS_FCAST_UOM	CS	CS	For N-tier marketing applications only. Affects budgets and claims.		Extensible
	EA	EA			
	USD	USD			
AMS_FND_ALLOC_ ALLOC_BASIS	EVEN	Even distribution	Budget > Allocation' The method of fund allocation to budgets		Extensible

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_FND_ALLOC_UOM	USD	USD	Unit of measure for fund allocations		Extensible
AMS_FORMULA_TYPE	ALLOCATION	Allocation	For N-tier marketing applications only. Affects budgets and claims.		Extensible
	HOLDBACK	Hold Back			
AMS_FUND_SOURCE	CAMP	Campaign	Campaign > *any campaign* > Budget	Type	System
	EVEH	Rollup Event			
	EVEO	Execution Event			
	FUND	Budget			
AMS_IMPORT_STATUS	ARCHIVED	Archived	Audience>Import	Status	System
	AVAILABLE	Available			
	NEW	New			
	PROCESSED	Processed			
	PROCESSED-INCOMPLETE	Processed - Incomplete			
AMS_IMPORT_TYPE	EVENT	Event	Audience > Import > *any list*	Type	System
	LEAD	Lead			
	RESPONSE	Response			
	SOURCE	Rented List			
AMS_IMP_DELIMITER_ TYPE		"Double Quotation	Audience > Import > Create	Field Enclosed by	System
		'Single Quotation			
	,	Comma			
	;	Semi-colon			
	FIXED	Fixed Length			
	SPACE	Space			
	TAB	Tab			
AMS_LIST_ROW_SELECT_ TYPE	NTH_RECORD	Nth Record	Audience > Audience > *any list*	Selection Size	System
	RANDOM	Random			
	STANDARD	Standard			
AMS_LIST_SEARCH	A	All lists	Audience > Audience	View	System
	U	My lists			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_LIST_SELECT_ ACTION	EXCLUDE	Exclude	Audience > Audience > *any list* Selection criteria for Action fields	Action	System
	INCLUDE	Include			
	INTERSECT	Intersect			
AMS_LIST_SELECT_TYPE	CELL	Target Segment	Audience > Audience > *any list*	Type	System
	DIWB	WorkBook			
	LIST	Existing List			
AMS_LIST_STATUS	ARCHIVED	Archived	Audience > Audience > *any list*	Status	System
	AVAILABLE	Available			
	LOCKED	Locked			
	NEW	New			
	PENDING	Pending			
	RESERVED	Reserved			
AMS_LIST_TYPE	TARGET	Target	Audience > Audience > *any list*	Type	System
	TEMPLATE	Template			
AMS_MARKET_ELIG_ TYPE	GEO_AREA	Geographic Area	Budget > *any budget* > Allocation	N-tier marketing use only	System
	MARKET_ SEGEMENT	Market Segment			
	TERRITORY	Territory			
AMS_MEDIA_TYPE	BROADCAST	Advertising	Admin > Activity (affects all Activity Type fields in campaigns)	Activity Type	System
	DEAL	Deal			
	DIRECT_ MARKETING	Direct Marketing			
	EVENTS	Events			
	INTERNET	iMarketing			
	IN_STORE	In-store			
	PUBLIC_ RELATIONS	Press and Analyst Relations			
	TRADE_ PROMOTION	Trade Promotion			
AMS_MESSAGE_TYPE	BRAND	Product Family	Message	Type	Extensible
	PRODUCT	Product			
	VISION	Vision			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_METRIC_ACCRUAL_ TYPE	FIXED	Fixed	For internal system use only. Does not affect UI		System
	VARIABLE	Variable			
AMS_METRIC_VALUE_ TYPE	N	Numeric	Admin > General > Metrics	Return Value	System
	R	Ratio			
AMS_MKT_SEGMENT_ TYPE	CELL	Target Segment	Audience > Segment > Create	Type	System
	MARKET_ SEGMENT	Market Segment			
AMS_OBJECT_USAGE_ TYPE	CREATED	Created	Campaign > Rollup or Execution Campaign > *any campaign* > Deliverable	Usage	System
	USED_BY	Used By			
AMS_OFFER_LUMPSUM_ PAYMENT	ACCRUE	Accrue	Campaign > Rollup or Execution Campaign > *any campaign* > Offers > *lump-sum offe*r	Payment Type (in Lumpsum offers only)	Extensible
	CHECK	Issue Check			
AMS_OFFER_STATUS	ACTIVE	Active	Campaign > *any campaign* > Offer	Status	System
	CLOSED	Closed			
	DRAFT	Draft			
	PENDING	Pending			
	REJECTED	Rejected			
AMS_OFFER_TYPE	ACCRUAL	Accruals	Campaign > *any campaign* > Offer	Type	System
	LUMPSUM	Lump Sum			
	OFF_INVOICE	Off Invoice			
	OID	Promotional Goods			
	ORDER	Order value			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
AMS_PRIORITY	FAST_TRACK	Fast Track	Campaign > *any campaign*	Priority	Extensible
	HIGH	High			
	STANDARD	Standard			
	LOW	Low			
	MEDIUM	Medium			
	VERY HIGH	Very High			
AMS_PRODUCT_LEVEL	FAMILY	Product Family	Campaign > *any campaign* > Products	Level	System
	PRODUCT	Product			
AMS_RESOURCE_STATUS	BOOKED	Booked	Event > Execution Event > *any event* > Resources	Status	System
	CONFIRMED	Confirmed			
AMS_TRIGGER_ FREQUENCY_TYPE	DAILY	Daily	Campaign > *any campaign* > Trigger > Setup	Frequency	System
	HOURLY	Hourly			
	MONTHLY	Monthly			
	NONE	None			
	QUARTERLY	Quarterly			
	WEEKLY	Weekly			
	YEARLY	Yearly			
AMS_TRIGGER_TYPE	DATE	Date	Campaign > *any campaign* > Trigger	Comparison Type	System
	METRIC_ METRIC	Metric to Metric			
	METRIC_VALUE	Metric to Value			
	METRIC_ WORKBOOK	Metric to Workbook			
AMS_VENUE_TYPE	CONVENTION_ CENTER	Convention Center	Admin > General > Venue	Venue Type	User
	HOTEL	Hotel			
	KIOSK_BOOTH	Kiosk/Booth			
OZF_FUND_REQUEST_ STATUS	APPROVED	Approved	Campaign > *any campaign* > Budget	Status	System
	PENDING	Pending Approval			
	REJECTED	Rejected			

Oracle Marketing Online Lookups

Lookup Type	Code	Meaning	Affected areas	Field	Access Level
OZF_FUND_STATUS	ACTIVE	Active	Budget> Budgets > Create	Status	System
	CLOSED	Closed			
	DRAFT	Draft			
	PENDING	Pending Approval			
OZF_FUND_TYPE	FIXED	Fixed	Budget> Budgets > Create	Type	System
	FULLY ACCRUED	Fully Accrued			
	STATISTICAL	Statistical			
OZF_PAYMENT_METHOD	ADJUSTMENT	Adjustment	N-tier marketing use only. Affects budgets and claims.		System
	CHECK	Check			
	CREDIT_MEMO	Credit Memo			
	DEBIT_MEMO	Debit Memo			
	REJECT	Reject			
	WRITE_OFF	Write Off			
OZF_UTILIZATION_TYPE	ACCRUAL	Accrual	N-tier marketing use only. Affects budgets and claims.	Utilization Type	System
	ADJUSTMENT	Adjustment			
	UTILIZED	Utilized			

Setting Up Status Classifications (Required)

Use this procedure to set up the status classifications used to categorize objects ranging from deliverables to speakers. The statuses you set up appear in the Status drop-down lists in each object.

You can use this procedure to set up status designations for the following objects:

- List import

- Campaign schedules

- Campaigns

- Deliverables

- Marketing event agendas

- Marketing event registration

- Marketing event speakers

- Marketing events

For example, you may want to classify deliverables as draft or approved, and speakers as contacted, confirmed, or cancelled.

Steps

1. Navigate to **Admin > General >User Status**.

2. From the Activity drop-down list, select the type of classification you wish to set up.

3. Use the System Status drop-down list select the status you want to map the classification to.

4. In User Status, enter the status.

5. If you wish to make this classification available only for a limited period of time, then enter a range of dates in the Start Date and End Date fields.

6. Click **Update**.

Creating and Editing Categories and Subcategories (Required)

Use this procedure to create both the Category and Subcategory drop-down lists used to classify campaigns, deliverables, events, budgets, metrics, and costs. The only difference between creating a category and a subcategory is that you specify a parent for a subcategory.

Prerequisites

If you are creating a subcategory, then you must create the parent category first.

Steps

1. Navigate to **Admin > General >Category.**

2. If you wish to create a new category or subcategory, then click **Create**. The Create Category subtab appears.

3. If you wish to edit a previous entry, then select the existing category or subcategory. The Category Details subtab appears.

4. Enter the name of the new category or subcategory. This name will appear in the Category or Subcategory drop-down list.

5. From the Created For drop-down list, select the object for which you are creating this category or subcategory.

6. If you are creating a subcategory, then, in Parent Category, click **Go** and use the list of values to enter the parent category.

7. Leave Liability Account and Adjustment Account blank. These are used by N-tier marketing implementations only.

8. Enter an optional description.

9. Make sure the Enabled check box is selected. Deselecting removes this category or subcategory from use.

10. Click **Update**.

Enabling the Budget Tab (Required)

Use this procedure to enable the budget tab.

Prerequisites
None

Steps
1. Log on to Oracle Applications under the Application Developer responsibility.

2. Navigate to **Applications > Menu**.

3. From the View menu, choose **Find**.

4. Find "Oracle Marketing Root Menu".

5. In the Navigator Prompt column, locate Budget.

6. In the Budget record, use the list of values to make the following entries:

   a. For Submenu, enter OZF_BUDGET_SUBMENU.

   b. For Function, enter OZF_BUDGET_OVERVIEW.

7. Save the record.

8. Bounce your Apache Server.

Setting Up the Campaign Tab (Required)

Use this procedure to set up the Campaign tab.

Prerequisites

Log into Oracle Marketing Online.

Steps

1. Set up the marketing mediums used to execute campaign activities. Please note that once a marketing medium is associated with an activity, it cannot be associated with another activity in the same time period. (Required)

2. Set up activities.(Required)

3. Create custom setups that will be used in campaigns and events. (Required)

Setting Up Marketing Mediums for Campaigns (Required)

Use this procedure to create or edit marketing mediums you use to execute the marketing activities for your company. A marketing medium can be a magazine or a television station you advertise in, an email server that sends out email promotions, or a telemarketing center. A marketing medium can have only one marketing activity associated with it at one time.

Prerequisites

Optional entry in Preferred Vendor, Party, and Managed By fields requires setup in Oracle financial applications.

Steps

1. Navigate to **Admin > General > Marketing Medium.**

2. If you are creating a new entry, then click **Create**. Otherwise select the name of the marketing medium you wish to edit**.**

   The Create Marketing Medium or Marketing Medium Detail subtab appears.

3. Enter or edit the name for the marketing medium.

4. Optionally, enter the other fields. The list of values for Preferred Vendor, Party, and Managed by come from ERP setups.

5. If you have not yet set up activities, then leave the Activity field blank. You can associate marketing mediums to activities while creating activities.

6. Click **Create** or **Update.**

   You are now ready to set up activities.

Guidelines

The optional fields include:

Field Name	Description
Preferred Vendor	Company name set up in Oracle Accounts Payable
Managed By	Individual name set up in Oracle Human Resources
Party	Party from the Oracle Customer Model
Active From and Active To	Dates this marketing medium can be used
Internal, Outbound, and Inbound check boxes	Specifies which type of campaigns the marketing medium can be used for
Activity	Lets you assign a marketing medium to an activity. If you have not yet created your activities, then leave this field blank. Instead, do the assignment while creating your activities.
Description	Free text description

Setting Up or Editing Activities for Campaigns and Events (Required)

Use this procedure to set up the activities for your campaigns and events. Each activity must be associated with one or more marketing mediums through which it is carried out.

For example, if you are running print ads in two newspapers, the Wall Street Journal and the Washington Post, and broadcasting a spot on one television station, then you may want to create two separate activities, one named "Print Advertising and another named "Television Advertising". The Print Advertising activity will have two marketing mediums associated with it: The Wall Street Journal and the Washington Post. The Television Advertising activity will have the television medium associated with it.

Prerequisites

You must set up marketing mediums before you can complete this procedure.

Steps

1. Navigate to **Admin > General > Activity**

2. If you are creating a new activity, then click **Create.**

3. If you are editing an existing activity, then select the name of the activity you wish to edit.

    The Create Activity or Activity Details subtab appears, depending on whether you are creating or editing the activity.

4. Enter or modify the name of the activity. This activity name appears in the Activity drop-down list in campaigns and events.

5. Use the Activity Type list of values (LOV) to select an activity type for this activity. The activity appears in the Activity list of values, when users select this activity type only.

6. Select the Active check box.

7. Enter a description.

8. In the Marketing Mediums region, enter one or more media that can be used for this activity:

    a. Use the Name drop-down list to select the marketing medium.

    b. In Active From and Active To fields enter the date range for this activity. The dates must fall between the effective dates for the marketing medium you have chosen.

9. Click **Create** or **Update.**

Guidelines
The optional fields include:

Field Name	Description
Active, Response check boxes	Lets you classify if an Activity is related to outbound or inbound marketing activities.
Description	Free text.
Marketing Medium Name	List of values with the marketing mediums you have set up previously.

Creating Custom Setups for Campaigns and Events (Required)

Use this procedure to create custom setups that customize what information users must enter for campaigns and events. A setup type specifies:

■   Which check-list attributes appear during campaign and event creation

- Which of these must be filled in by users before they can make a campaign or an event active

- The order in which the attributes are listed in the check list

When users create campaigns and events, they select one of the custom setups you create from the Setup Type drop-down list.

Prerequisites

Before you carry out this procedure, you must set up:

- Marketing mediums

- Activities

Steps

1. Navigate to **Admin > General> Custom Setup.**

2. Click **Create.**

   The Create Custom Setup subtab appears.

3. In Setup Name, enter a name for this setup type. This is the name that appears in the Setup Type drop-down list during campaign and event creation and above the list of check-list attributes.

4. From the Associated With drop-down list, select whether you want to use this template for execution campaigns, rollup campaigns, execution events, or rollup events.

5. Use the Activity Type drop-down list to select an activity where this custom setup will appear.

6. If you wish to limit the use of this setup type further, then select an activity for the activity type. If you do not select an activity type, then this setup type can be used for all activities for the activity type.

7. In the Components region, select the Show check box for attributes you wish to appear on the check list for the campaign or event using this setup type.

8. If you wish to make any of the attributes mandatory for a campaign, then select the Mandatory check box next to each attribute. If a user does not make an entry in a mandatory attribute of a campaign, then the campaign cannot be used.

> **Note:** Making a check-list attribute mandatory requires users to make an entry in the attribute but does not require them to fill in all the information requested. Any entry satisfies the requirement and marks the attribute with a check mark.

9. If you wish to modify the order in which the attributes appear on the check list then modify the numbering in the Sequence field.

10. If you wish to enable campaign theme approval using the default Oracle Marketing Online workflow, then select the Show check box for Theme Approval.

11. If you wish to enable campaign budget approval using the default Oracle Marketing Online workflow, then select the Show check box for Budget Approval.

12. Click **Create.**

Guidelines

The optional fields include:

Field Name	Description
Active check box	Deselecting this check box removes this template from use.
Source Code Suffix	Enter a suffix for the source code that is generated automatically whenever an agent creates a campaign.
	This source code becomes the primary reference to the campaign and is referred to by the Oracle Telesales and Oracle Order Capture applications. It can be used to track the effectiveness of a campaign through consumer activity. When a campaign is defined, a source code may be manually entered by the user, or if none is entered, the source code will be system generated
Marketing Medium Name	LOV of Marketing Mediums you have set up previously.

Setting Up Metrics (Required)

Use this procedure to set up all metrics. This includes cost metrics as well as those metrics used to track the performance of your campaigns, events, and deliverables.

Prerequisites

None

Steps

1. Navigate to **Admin > General > Metrics.**

2. If you wish to create a new metric, then click **Create**.

3. If you wish to edit an existing metric, then select the metric to edit from the list.

   The Metrics Definition subtab appears.

4. Enter the metric name.

5. Optionally, select the metric category and subcategory.

6. From the Used With drop-down list, select what object will use this metric.

7. Enter an optional description.

8. In the Calculation region, select the radio button that describes how this metric is getting its values:

- If users are entering values in this metric, then select the **Enter Value Manually**.

- If this metric is getting its values from another metric then select **Accrue through summarization**. Use this selection both for metrics that summarize other metrics at the same level in the campaign or event hierarchy and those that summarize values from levels down the campaign or event hierarchy.

- If the metric is to get its value using an external program, then select the **Calculate using Program** and enter the path in the text box provided.

- If you wish the metric to be calculated using another metric, select **Calculate using Metric**, click **Go** and use the list of values (LOV) to enter the metric.

9. In the Summarize to region, enter information about where the metric is passing its values. Select one of the three radio buttons:

- If the metric is not passing its value to another metric, then select **None**.

- If the metric is passing its value to a metric in a parent rollup campaign or parent rollup event, then select **of the Parent,** click **Go,** and use the list of values (LOV) to enter the metric. The destination metric must be of type **Accrue through summarization**.

- If this metric is sending its values to another metric at the same level in the campaign or event hierarchy, then select **at same level,** click **Go**, and use the LOV to enter the name of the metric to which you are passing data.

10. Click **Update**.

Setting Up Geographical Regions (Required)

Use this procedure to set up geographical regions that are used to target campaigns.

Prerequisites

None

Steps

1. If you wish to change the names of geographical levels the user sees in the Level drop-down list, then:

    a. Navigate to **Admin > Geography > Location Type.**

    b. For each level, you can modify the existing Location Name. The user sees the Location Name in the Campaign Geography attribute list of values (LOV). You cannot add any additional locations or modify the preset levels.

    c. Enter an optional description.

    d. Click **Update**.

2. Navigate to **Admin > Geography > Geographic Area.**

3. Enter the geographical hierarchy for your campaigns:

    a. Click **Create**.

    The Geographic Areas dialog appears.

    b. Use the Parent list of values (LOV) to enter a parent region for the child region you are creating. For example, if your company is targeting campaigns by different counties, then you will enter a specific state as a parent.

    The Type field is filled in automatically.

    c. In the Child region, use the Type drop-down list to enter the type of area you are creating. In our example, county.

    d. Enter a name and optional short name for the area.

    e. Enter a start date.

    f. If you wish for this geographical area to expire, then enter an end date.

    g. Click **Update**.

Creating Venues (Required)

Venues describe the physical location where an event is being held. Use this procedure to set up venues for your events.

Prerequisites

None

Steps

1. Navigate to **Admin > General > Venue**

2. Click **Create**.

The Create Venue subtab appears.

3. Enter the venue name, venue type, and other appropriate information about the venue.

4. Select the Active check box.

5. Click **Create**.

Guidelines

Make sure to use a unique name to identify a venue. For example, the name Hyatt Regency covers hotels in many locations. Use Hyatt Regency San Francisco instead.

Mapping Your Customer Model on to Oracle Marketing Online (Optional)

You can map your existing customer model to Oracle Marketing Online. Contact Oracle Consulting for further information.

Setting Up Data Fields for Lists (Optional)

Use this procedure to determine which AMS_LIST_ENTRIES and AMS_IMPORT_ SOURCELINES table columns are available for list generation. Both tables contain 256 user definable columns. By default, all columns are available. Use caution if you choose to carry out this procedure. If you make some of the columns unavailable, then you cannot make them available for list generation later on.

Prerequisites

None

Steps

1. Navigate to **Admin > List > Data Fields.**

2. Use the View drop-down list to select a table.

3. Deselect the Active check box for any field you wish to disable.

4. Click **Update**.

Setting Up Deduplication Rules (Required)

Use this procedure to determine which field(s) (table columns) will be used for deduping. The software uses the logical AND for deduping. This means that if you use multiple fields for deduping in a rule, then all of the fields have to match.

Prerequisites

None

Steps

1. Navigate to **Admin > List > Deduplication Rules**

2. If you wish to create a new deduplication rule, then:

    a. Enter the rule name in the empty text box in the Rule Name column.

    b. Enter an optional description.

    c. From the Type drop-down list, select what type of list this rule will apply to.

    d. Click **Update**.

       The new rule appears in the list.

3. Select the name of the rule you just created or you wish to edit.

    The List Rule subtab appears.

4. If you wish to add a column that will be used for deduplication, then:

    a. Click **Go** in the Column Name field and use the list of values to enter the name of that column.

    b. In Data Length, enter the number of characters to be matched. For example, if you specify 5 on a last name, then any two last names with the first five matching characters will be considered duplicates.

    c. Click **Update**.

5. If you wish to remove a field from the rule, then:

    a. Select the Remove check box next to the rule you wish to remove.

    b. Click **Update**.

Setting Up Word Replacement Rules (Required)

The Word replacement rules you enter using this procedure tell the application what words may be potential duplicates of each other. For example, a customer with the name of Robert Smith may be the same customer with the name of Bill Smith. Use this procedure to set up potential duplicate words for specific tables and columns.

Steps

1. Navigate to **Admin > List > Word Replacement**

    The Create Word Replacement subtab appears.

2. In the Original Word field, enter the target word, for example, Robert.

3. In the Replacement Word field, enter the duplicate word, for example, Bob.

4. Click **Update**.

5. Click the Details link for the word you just entered.

    The List Word Replace Fields region appears.

6. Use the Field Table Name drop-down list to select the table for which you wish to use for this entry.

7. Use the Field Column Name list of values to enter the name of the column you wish to use.

8. Click **Update**.

9. If you wish to apply this entry to multiple columns, make additional entries in the Field Table Name and Field Column Name fields.

Setting Oracle Marketing Online System Profile Options (Required)

You can set the following system profile options:

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_AUTO_REGISTER_FLAG	If set to Yes, the profile automatically registers an individual on a wait list for an event when an enrollee cancels.
	Can be set at: Site, Application

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_CALL_CENTER_ ENABLED	Setting this system profile option to Yes enables the transfer of data into Oracle Call Center.
	Can be set at: Site, Application
AMS_CAMPAIGN_DISPLAY_ VERSION	AMS: Campaign Display Version
	Can be set at: Site
AMS_CAMPAIGN_DEFAULT_ CALENDER	AMS: Marketing Calendar
	Can be set at: Site
AMS_CONF_CODE_PREFIX	This prefix is added to the generated confirmation code for event registrations. The code can be alphanumeric, for example, a company name.
	Can be set at: Site, Application
AMS_COPY_EVH_TO_EVO	Enables copying Rollup Event information to its Execution Events.
	Can be set at: Site
AMS_CURR_CONVERSION_ TYPE	This profile is used to specify the Oracle General Ledger conversion type that is used for Oracle Marketing Online transactions. For example, the currency conversion rate can be determined by a corporate conversion rate or a daily spot rate.
	Can be set at: Site, Application
AMS_DEFAULT_CURR_CODE	Determines the currency used for price list creation.
	Can be set at: Site
AMS:DEFAULT_TASK_RULE	AMS: Default Task Rule
	Can be set at: Application, Site
AMS:DEFAULT_TIMEOUT	AMS: Default Time Out Use For
	Can be set at: Site
AMS_HZ_DEDUPE_RULE	Specifies which rule is used to control unwanted duplicates when customers are saved in the customer master table HZ_PARTIES.
	Can be set at: Site, Application

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_IMP_CTL_PATH	Specifies the path to the SQL*Loader control file used for importing data. You must set this profile to run the AMSIPROC concurrent program.
	Can be set at: Site
AMS_IMP_DATA_PATH	Specifies the path for the data file to be imported. You must set this profile to run the AMSIPROC concurrent program.
	Default = /amsdev/ams/11.5/bin/
	Can be set at: Site
AMS_IMP_DEDUPE_RULES	Specifies the rule the application follows to search for duplicates in the imported file itself. You must set this profile to run the AMSIPROC concurrent program.
	Can be set at: Site, Application
AMS_INV_API_CALLOUT	AMS: Should Call to Inventory
	Can be set at: Site
AMS_ITEM_ORGANIZATION_ ID	Determines the inventory organization (Master Organization) for the inventory items created for collateral and events in Oracle Marketing Online.
	Can be set at: Site, Application
AMS_LOWEST_ NOTIFICATION_LEVEL	AMS: Lowest importance level f
	Can be set at: Site
AMS_NEWS_PER_COMPANY	Determines the number of news items to be displayed for each company listed on a user's home page. Users set this profile using the Preferences tab in the application.
	Can be set at: Site, Application
AMS_NUM_BIN_ITEMS	Determines the number of items to be displayed in each of the bins on the home page. Users can set this profile using the Preferences tab in the application.
	Can be set at: Site, Application
AMS_PRICELIST_HEADER_ NAME	All Events pricing will align under this price list header.
	Can be set at: Site
AMS_QP_PRICING_CALLOUT	AMS: Should Call to Pricing Mo
	Can be set at: Site

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION
AMS_SRCGEN_DATE_ PATTERN	AMS: Source Code Date Format
	Can be set at: Site
AMS_SRCGEN_SEQUENCE_ LENGTH	AMS: Source Code Sequence Length
	Can be set at: Site
AMS_SRCGEN_USER_CITY	AMS: User country.
AMS_STOCK_SYMBOLS	Determines which stock information displays on the home page. Enter the desired stock symbols. Users can set up this list using the Preferences tab in the application.
	Can be set at: Site, Application
AMS_SYSTEM_TIMEZONE_ID	Enter the time zone for the system that runs system the Concurrent Manager. This profile option is required only for organizations working across multiple time zones.
	Can be set at: Site
AMS_TIME_FORMAT	Controls the format in which time is displayed in Oracle Marketing Online.
	Can be set at: Site, Application
AMS_USER_DEFAULT_TEAM	AMS: Default Team for User
	Can be set at: Site, Application, Responsibility, User
AMS_USER_TIMEZONE_ID	User's time zone. This profile option is required only for organizations working across multiple time zones.
	Can be set at: Site, Application
AMV_PROFILE_DEFAULT_ TICKER	Can be set at: Site
AMV_PROFILES_NEWS_ITEMS	Can be set at: Site, User
OZF_AP_SOURCE	OZF: AP Source for N-Tier Marketing
	Can be set at: Site
OZF_ARCM_BATCH_SOURCE	OZF: Credit Memo Batch Source for N-Tier Marketing
	Can be set at: Site
OZF_ARDM_BATCH_SOURCE	OZF: Debit Memo Batch Source for N-Tier Marketing
	Can be set at: Site

Oracle Marketing Online System Profile Options

PROFILE NAME	PROFILE DESCRIPTION

Implementing Oracle Discoverer (Required)

Use this procedure to install and implement Oracle Discoverer.

Prerequisites

None

Steps

1. Install Oracle Web Discoverer from your CD. This includes the product and the patch. Make sure that you use the Oracle installer Discoverer provides. Use default Oracle Home while installing.

2. Verify your work:

    a. Set up TNSNAMES by using oracle 8i Net8 easy configuration from your **Start > Programs >Oracle Windows NT**.

    b. Launch Discoverer Admin Edition by selecting **Start > Programs > Oracle Discoverer 3.1> Administration Edition**.

3. Install the Web Discoverer Server from your Discoverer 3i CD. Follow the installation guide *Discoverer 3i Installation & Administration Guide Release 3.3 for the Web* (A66104-02).

4. Make sure your Web server and browser are both supported by Oracle.

    Oracle supported HTTP servers are:

    ■   Oracle Application Server

    ■   Netscape Enterprise Server

    ■   Apache Server

    ■   MS Internet Information Server

    Oracle Web Discoverer supported web browsers are:

    ■   IE 3.x with JInitiator

    ■   IE 4.01 (4.72.3110.8 in the About box) and higher.

- IE 5.0

- Netscape 3.0, 4.0X with Jinitiator 1.1.7

5. Make sure that the Locator (where your http server runs), Session, and Preferences components (where Oracle Web Discoverer server runs) must all be installed on the same subnet. You can ping them to get their IP address.

6. Make sure that the applet and HTML are accessible to the web server. Set up aliases in your web server configuration file if necessary. Test it by launching Oracle Web Discoverer welcome page provided in the documentation. If you cannot launch the welcome page, your Oracle Web Discoverer installation has problems. Go back to your documentation and make sure you have followed the steps.

7. Make sure that the following parameters have been set up correctly in your preferences file (pref.txt) and apply the file:

- Machine Ips = "web server machine IP address or name"

- ShowUserTypeChoice 1

- DefaultUserTypeIsApps 1

- AppsGWYUID "APPLSYSPUB/PUB"

- AppsFNDNUM "APPS"

8. Create the End User Layer (EUL) and import EUL Export File (EEX) and Workbooks according to the steps outlined in the *BIS11i Implementation Guide* (A77481-02).

9. Verify your work:

   a. Launch your Discoverer Admin edition

   b. Open the business area Market Online.

   c. Open up Market Online to see its folders.

   d. Make sure you grant the right privileges and responsibilities to your business area.

   e. Make sure that you use the right EEX for importing. Oracle Marketing Online business area is in biseul.eex.

   f. Do not forget to refresh the business areas, the last step in the guide.

g. When creating the EUL, you must run a list of database GRANTs required by the EUL owner according to the documentation. Please make sure the following grants are run:

*   grant select on FND_APPLICATION to eul_us;

*   grant select on FND_RESPONSIBILITY_VL to eul_us;

*   grant select on FND_ORACLE_USERID to eul_us;

*   grant select on FND_DATA_GROUP_UNITS to eul_us;

*   grant select on FND_USER_RESP_GROUPS to eul_us;

*   grant select on FND_USER to eul_us;

*   grant select on FND_PRODUCT_INSTALLATIONS to eul_us;

*   **grant execute on FND_CLIENT_INFO to eul_us;**

*   **grant select on FND_SECURITY_GROUPS_VL to eul_us;**

The last two grants (highlighted in bold) are missing from the documentation. You must run these two grants or you will not be able to see Marketing Online Business Area folders.

10. Make sure that your tnsname is set up with the correct service name. (You will receive an "could not find service name" error if this is not set correctly.) To set the tnsname:

a. Run Oracle 8 easy configuration.

b. To verify, run SqlPlus to see whether you can connect to the database.

11. Create a directory. For example: `C:\mydisco`

12. Create a sub-directory named `secure` under it. For example: `C:\mydisco\secure`

13. In the secure directory, create a dbc file. A typical dbc file looks like:

```
TWO_TASK=<database name, ex: OMDB>
GWYUID=APPLSYSPUB/PUB
GUEST_USER_PWD=<An account on Oracle application, you can create one
with none responsibilities, ex: guest/guest>
FNDNAM=apps
APPS_Jdbc_DRIVER_TYPE=THIN
DB_HOST=<database host name, ex: ap030sun.us.oracle.com >
DB_PORT=<database port, ex: 1521>
```

14. For internal, you can go to unix $FND_TOP/secure directory to find a dbc template. For dbc document, refer to Appendix part in the *Oracle Applications System Administrator's Guide (*A75396-02). Without setting this correctly, you will receive a "no dbc file found" error later on.

15. After creating dbc file, set up FND_TOP environment to where your dbc file sits (For example: `C:\mydisco`).

    a. If you are running on Microsoft NT, then set this environment in **Start > Settings > Control Panel > System**. Make sure that you set up a system variable instead of a user variable. Reboot.

    b. If you are using the Unix operating system, then set up using the `setenv` command.

16. Make sure that the following ARU # 311532, 313216 have been applied to your system. The latest OMO ARU (1383055) has these ARUs in it.

17. Make sure the Form Function AMS_LAUNCH_DISCO is created in the Oracle applications instance that will use Discoverer. To check:

    a. Log on as PHP. For example: VISION\VISION98 on DOM1151.

    b. Choose the APPLICATION DEVELOPER responsibility, choose **Application > Function**

    c. Query Function Name AMS_LAUNCH_DISCO for details.

    d. If Form Function AMS_LAUNCH_DISCO is not set up, you can set it up by following instructions described in the following URL: http://www-apps.us.oracle.com/bis/development/discoverer/index.htm

       Use the navigation tree at left to navigate to **Configuration > SSWA Integration > Form Function**

18. Set the following ICX profiles in Oracle Applications:

ICX _PROFILE:	ICX_DISCOVERER_LAUNCHER
Description:	URL that points to the Web Discoverer Server
Example:	`http://ap152wgs.us.oracle.com/webdis/html/engli sh/welcome.htm?Connect=[APPS_SECURE]`

ICX_PROFILE:	ICX_DEFAULT_EUL

Description:	This in combination with the language code make up the EUL owner at run time.
Example:	EUL (not EUL_US)

19. The Oracle Applications APPS_WEB_AGENT profile must be setup and valid. Go to Oracle Application to verify.

20. Make sure that The EUL_TRIGGER$POST_SAVE_DOCUMENT function be registered and valid. This will ensure that work book SQL will be saved to the AMS_DISCOVERER_SQL table:

    a. Navigate to Discoverer Admin edition.

    b. Select **Tools > Register PL/SQL functions**.

    c. Register this function according as follows, either by using the import buttons or by manually typing them in. Make sure you enter these parameters in order:

    ```
    Name: EUL_TRIGGER$POST_SAVE_DOCUMENT
    Display Name: eul_trigger$post_save_document  (lower case)
    Owner: APPS
    Package: AMS_DISCOVERERSQL_PVT
    Database Link: <Default Database>
    Return Type: Number
    Check "Available in User Edition" check box
    ```

    For the Arguments tab

    ```
    P_WORKBOOKOWNER
    P_WORKBOOKNAME
    P_WORKSHEETNAME
    P_SEQUENCE
    P_SQLSEGMENT
    ```

    All data types are varchar except for P_SEQUENCE which has a data type of Number.

    d. All of the arguments are required, so select the **Required** check box.

    e. Click **Validate** to validate the function you just registered.

    f. Exit Discoverer Admin Edition and User Edition (if you have them running) to make sure the changes are committed.

21. Create Workbooks:

    a. Launch Discoverer in one of two ways:

       ■ Using Discoverer User Edition (client/server version)

       ■ By clicking the hyperlink in the Oracle Marketing Online GUI

    b. After you launch Oracle Web Discoverer, select Creating Workbooks and pick the Oracle Marketing Online Business area.

       You will see a list of folders in this business area. Select the folder of your choice, click + to expand it.

    c. Each folder has one mandatory identifier item and one "Include XXX details" item (usually these are the first two items in your tree). **You must select these two items for your workbook.** You can but need not select the rest of the items.

    d. Use the wizard to specify your conditions. You can see your selections by executing the workbook.

22. Save the Workbooks into the database (not your computer). This create the SQL statement of your newly created workbook and store that into a database table.

23. If you do not see a list of workbooks from Oracle Marketing Online workbook LOV window and you do see a list of workbooks stored in your database, then your registered function is not setup correctly. You can check the function using Oracle Web Discoverer Administration Edition or you can also log in with SqlPlus to check whether there are any rows in the AMS_DISCOVERER_SQL table.

24. If you wish to share your Workbook with other users, then:

    a. In Oracle Web Discoverer, choose **File > Manage Workbooks > Sharing**.

    b. In **Workbook > User** tab, select the workbook you want to share.

    c. Select the users you want to share the workbook and add these users to the shared area.

    d. Click **OK**.

Setting Up News and Stocks for the Home Tab (Optional)

Use this procedure to set up the stocks and news feeds for users' home tabs.

Prerequisites

The table AMV_STOCKS must contain data.

You must obtain a license from OneSource. Navigate to www.onesource.com for more information.

Steps

1. Run the KeyDaemon. Allow for 3-10 hours depending on how many stock key IDs you would like it to retrieve.

   If you do not plan on updating the AMV_STOCKS table regularly, you don't need to leave the KeyDaemon running after the initial 3-10 hours. Its only purpose is to fetch key ids for companies whose stock symbols are in AMV_STOCKS, but do not have key ids assigned to them yet. This will only occur after the initial run if you are updating the AMV_STOCKS table.

2. Run the NewsDaemon. There are two kinds of updates that the NewsDaemon can perform:

   - **A User Update:** This update only fetches news for companies that are specified in specific user's profiles. This kind of update can be performed at a minimum of once per hour.

   - **A Global Update**: This update fetch news for all the companies that have key ids in the database. This kind of update can be performed at a minimum of once per week. These limitations are set due to server-load restrictions on the content provider's side. The update-interval for either type of update may be increased without limit. The NewsDaemon may be started with either type of update.

   If a user adds a company to their profile, the news for that company will only show up immediately if three conditions are met:

   - The company symbol exists in AMV_STOCKS

   - The KeyDaemon has already retrieved the content-provider key for that company

   - Another user already had that company in their profile before the last user update or a global update has been done at least once.

Java Class Usage for KeyDaemon and NewsDaemon

Following is a list of the arguments and their meanings for the KeyDaemon and the NewsDaemon

KeyDaemon

Purpose:	Specify the database host, port, alias, and log-in information.
Syntax:	`-d <db connect string> <user or schema> <password>`
Example(s):	`-d jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps`
Required:	Yes
Default	N/A

Purpose:	Specify the content provider code.
Syntax:	`-v <vendor code 1>[, vendor code 2,...]`
Example(s):	`-v ONE_SOURCE,HOOVERS, -v ONE_SOURCE (*currently only this vendor code is available)`
Required:	Yes
Default:	N/A

Purpose	Specify the interval to sleep between updates in hours minutes, seconds and milliseconds.
Syntax:	`-u <HH:MM:SS:mm>`
Example(s):	`-u 01:00:00:00` (once every hour)
Required:	No
Default:	24:00:00:00 (once every day)

Purpose:	Specify a file to log errors to.
Syntax:	`-f <logfile path>`
Example(s):	`-f /home/rjainend/keyd.log`
Required:	No
Default:	None

Purpose:	Specify a network proxy host and port.
Syntax:	`-p <proxy hostname> <proxy port>`
Example(s):	`-p www-proxy.us.oracle.com 80`
Required:	Required only for organizations behind a fire wall.
Default:	None

Purpose:	View the usage text.
Syntax:	`-h`

Purpose:	Write messages to standard output.
Syntax:	`-verbose`

Purpose:	Write debugging info to standard output.
Syntax:	`-debug`

Sample Usage

```
java oracle.apps.amv.news.KeyDaemon -d
jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps -v ONE_
SOURCE -u 4:00:00:00 -f keyd.log -p www-proxy.us.oracle.com 80
-verbose
```

Daemon News Usage

Purpose:	Specify the database host, port, alias, and log-in information.
Syntax:	`-d <db connect string> <user or schema> <password>`
Example:	`-d jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps`
Required?	Yes
Default:	N/A

Purpose:	Specify the content provider code.
Syntax:	`-v <vendor code 1>[, vendor code 2,...]`
Examples:	`-v ONE_SOURCE,HOOVERS -v ONE_SOURCE` (*currently only this vendor code is available)
Required?	Yes
Default:	N/A

Purpose:	Specify the interval to sleep between User Updates in hours, minutes, seconds and milliseconds.
Syntax:	`-su <HH:MM:SS:mm>`
Example:	`-su 1:00:00:00` (once every hour)
Required?	No
Default:	1:00:00:00 (once every hour)

Purpose:	Specify the interval to sleep between Global Updates in hours, minutes, seconds and milliseconds.
Syntax:	`-lu <HH:MM:SS:mm>`
Example:	`-lu 168:00:00:00` (once every week)
Required?	No
Default:	168:00:00:00 (once every week)

Purpose:	Specify the number of news items to fetch for each company during a User Update.
Syntax:	`-sn <number of news items>`
Example:	`-sn 20`
Required?	No
Default:	20 (This is also the maximum number of news items allowed for a User Update)

Purpose:	Specify the number of news items to fetch for each company during a Global Update.
Syntax:	`-ln <number of news items>`
Example:	`-ln 10`
Required?	No
Default:	10 (This is also the maximum number of news items allowed for a Global Update)

Purpose:	Specify a file to log errors to.
Syntax:	`-f <logfile path>`
Example:	`-f /home/rjainend/newsd.log`
Required?	No
Default:	None

Purpose:	Specify a network proxy host and port.
Syntax:	`-p <proxy hostname> <proxy port>`
Example:	`-p www-proxy.us.oracle.com 80`
Required?	No. This will be necessary for any organization behind a fire wall.
Default:	None

Purpose:	Start the NewsDaemon in User Update mode. If this argument is not specified, the NewsDaemon will start in Global Update mode.
Syntax:	`-short`

Purpose:	View the usage text.
Syntax:	`-h`

Purpose:	Write messages to standard output.

Syntax:	-verbose

Purpose:	Write debugging info to standard output.
Syntax:	-debug

Sample Usage

```
java oracle.apps.amv.news.NewsDaemon -d
jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps -v ONE_
SOURCE -su 4:00:00:00 -sn 5 -lu 200:00:00:00 -ln 5 -f keyd.log
-p www-proxy.us.oracle.com 80 -verbose -short
```

Known Problems with Oracle Discoverer

- Current release will not work if cookies are disabled.

- If you do a refresh of the database, then the applications user password must be reset before users can log into Oracle Web Discoverer again.

- Errors with text such as: "Failed to connect to database - Unable to connect to Oracle Applications database (asfcpgcs)"

  This occurs when you click on the Oracle Web Discoverer icon, bring up the Discoverer applet, but it fails to connect to the applications database.

  Cause: Discoverer dbc file in the secure directory is not set up correctly. or the TNSNAME is not set up right in Discoverer server.

- Errors such as "Wide Area Network Connection failed." often mean that you need to bounce the server.

- If you have accessed other version of Oracle Discoverer before, your browser cache may have the latest version of Discoverer objects. If you access a lower version of Oracle Discoverer, you will get the wide area network connection error in IE. For example:

  "Unable to connect to the Oracle Discoverer Application Server: -Wide area network connection failed. Locator interface incorrect.   Expecting version 3.3.3 got version 3.3.2."

  To resolve this in Internet Explorer:

  1. Navigate to **Tools > Internet Options > Settings >View Objects.**

2. Delete the Oracle Discoverer 3i and Oracle Discoverer 3i Initializer entries.

3. Exit all Internet Explorer browser windows and reconnect to the Oracle Marketing Online site.

Seeded Workflows

Application System	Workflow	File Name
AMS	Continuous Campaign	amsccamp.wft
	Marketing Approvals	amsvappr.wft
OZF	Fund Request Approvals	ozfvwreq.wft