Oracle® Marketing Encyclopedia System

Concepts and Procedures

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Understanding Oracle Marketing Encyclopedia

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Overview of Oracle Marketing Encyclopedia

Oracle Marketing Encyclopedia stores information and classifies the information using a hierarchy of categories that contain channels. Channels are the lowest level on the hierarchy of categories that contain published items. Content is published to specific channels via a push method or matching method. Channels are assigned to categories or subcategories.

Channels can be classified as *content* or *group* and their access can be set to *public,* or *private.* If you do not know the correct channel to use when publishing a document, then Oracle Marketing Encyclopedia assigns the document to the correct channel by matching the document attributes to the channel attributes.

The information is published and distributed in a controlled manner through the use of *groups.* Extensive search capabilities including the use of keywords, author, and description means published items are easily found.

A user becomes a member of one or more groups and relationships are established between groups and channels. For example, user 1 is a member of group 1 and automatically receives any new publications to group 1. Channel 4 is a required channel for user 1 so documents published to channel 4 are automatically sent to user 1. User 1 also can look for or subscribe to information in channels 2 and 3, which are available to group 1, but not required. User 1 also can access any publication that is available to everyone.

You will find Oracle Marketing Encyclopedia in a tab labeled **MES** located in Oracle Marketing, where you can publish marketing collateral.

Any type of file can be published in Oracle Marketing Encyclopedia.

Understanding Channels

A channel is a repository of files that is classified according to attributes assigned to the channel. Channels and categories are organized into a hierarchy.

There are three types of channels:

- Public: All users can see these channels
- Group: Only group members can view or publish to these channels
- Private: A user can view his own private channels

You have access to the following channels:

- Required

  All members of a particular group receive information from channels that are required for the group.

- All Available

  All channels that are public or that you have rights to because of membership in groups are available.

- Subscribed

  You can select from all available channels those channels you want to view in My Channels. You can also subscribe from within My Channels.

- Private

  You can create your own channel that is available only to you.

Implementing Oracle Marketing Encyclopedia

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

Implementing Oracle Marketing Encyclopedia

The tasks you need to perform to implement and administer Oracle Marketing Encyclopedia are listed in the following table.

Tasks

The following tasks must be done to use Oracle Marketing Encyclopedia. The tasks are listed in a workable, but not required, sequence.

	Task	Description
1.	Create User Privileges	Assign publishing privileges to users set up in Resource Manager
2.	Create groups	Create groups and assign users to the groups
3.	Edit Group Attributes	Assign publishing privileges to groups
4.	Create categories and subcategories in hierarchies	A category groups channels of information. Categories are grouped into hierarchies.
5.	Create perspectives	A perspective is a method of categorizing content information
6.	Create content types	Add user-defined content types
7.	Create channels	See Adding Channels for information on how to add channels.
8.	Assign channel access	Use the Channel Access Manager to assign access privileges to users and groups by channel
9.	Set workflow time out	Time out is set in workflow definition. The workflow time type name is AMV_APPR. This sets the time limit for an item to remain in an approver's queue.

Integrating with OneSource

OneSource provides extensive news information that appears on your home page. Use this procedure to implement your integration with OneSource.

Prerequisites

You must have licenses for the following applications:

- Oracle Oracle Marketing Encyclopedia
- OneSource. Contact a OneSource representative.

Steps

1. Set the profile option AMV_PROFILE_USER_STOCKS with the default stock symbols to be used for displaying the news and stock price for new users until users create their own ticker to subscribe. Enter a list of

comma delimited stock symbols with no spaces. If this profile option is left blank, then a new user will see no company news or stock price information on the home page.

2. Users set their own profile option AMV_PROFILE_NEWS_ITEMS. Set from 1 to 20 news items to be shown on the home page. Also set stock ticker symbols to be shown on the home page, in ascending order by stock ticker symbol. Enter the symbols in comma delimited format with no spaces.

3. Load stock symbols. A list of companies traded in NYSE and NASDAQ as of 11/10/1999 is provided in the seed data. As new companies are listed in these exchanges for trading, the list of companies must be bought from your vendor such as Reuters or Quotes.com and loaded to the table. Use the SQL*Loader control file to load these data into the appropriate table. Note: As the input file content may slightly change between different vendors, you should change the control file provided to suit the vendor's data.

   Below are some of the requirements while loading stock symbols (AMV_STOCKS):

   - Stock_symbol and stock_ric should not have any trailing white spaces. Use rtrim and ltrim if required
   - Stock_symbol should be loaded in upper case
   - Mandatory columns while loading stocks:

     stock_id

     stock_symbol

     stock_ric

     stock_desc

     exchange

4. The stock price information must also be bought from these vendors and loaded into the application to show the latest stock price and the changes. Below are some of the requirements while loading stock prices (AMV_STOCK_PRICE):

   - Stock_ric should not have any trailing white spaces. Use rtrim and ltrim if required.
   - Timestamp should be loaded. Latest stocks are retrieved based on the time entered in this timestamp.
   - Mandatory columns while loading stock price:

     Stock_price_id

Stock_ric

Stock_price

Change

Time_stamp

- Stock_ric is a key unique for every stock and it is used for joining the tables AMV_STOCKS and AMV_STOCK_PRICE. This should be taken into consideration while loading stocks and stock price data.

5. Obtain Key IDs from OneSource using a program called KeyDaemon. A key ID is a unique identifier for a company. The KeyDaemon program can be run on any machine that:

   - Has jdk 1.1.6 or later JVM
   - Has network access to the database

   The KeyDaemon should not be run until the AMV_STOCKS table has been populated (see Loaders).

   If you load your own stock data, then the KeyDaemon should be run once to pre-seed the AMV_VENDOR_KEYS table. It works by attempting to look up One Source Key IDs for every stock symbol in the AMV_STOCKS table.

   Once shipped, the KeyDaemon should be set to run with an update interval of less than or equal to 24 hours. This will allow new One Source KeyIDs to be found for companies in the AMV_STOCKS table, which weren't originally there.

6. Obtain news items from OneSource using a program called NewsDaemon. KeyDaemon must be run at least once before NewsDaemon can be run. NewsDaemon can be run at any time and on any machine that:

   - Has jdk1.1.6 or later JVM
   - Has network access to the database

   Never run two separate NewsDaemon processes for the same Database at the same time. This will cause problems, the most common that of duplicate News Items.

   There are two functions of the NewsDaemon:

   - Updating news for ALL keys in the AMV_VENDOR_KEYS table on a minimum of a weekly basis. NewsDaemon can update a maximum of 10 News Items per company.

- Updating news for keys selected by users (in the AMV_USER_TICKERS table) on a minimum of an hourly basis. NewsDaemon can update a maximum of 50 News Items.

Guidelines

Stocks from only one country or exchange can be loaded.

Oracle Marketing Encyclopedia provides additional APIs you can use to retrieve selected company news and stock quotes:

1. Boolean updateStocks(Connection c, int userid, String syms): This API allows users to specify the companies for which they want to receive both news and stocks. The syms argument should be a comma or space delimited string of stock ticker symbols, and the connection a java.sql.Connection to a database. This function returns true if the update was successful, false otherwise.
2. Vector getNews(Connection c, int userid, AppsContext ctx): This API retrieves news items for a user based on the companies that user has selected. If the user has never specified any companies, then news items for the AMV_PROFILE_USER_STOCKS profile set of companies will be returned. Note that this API will also return stock information for each company returned if and only if that stock information is available. If there was an error attempting to retrieve news, then null will be returned.
3. Vector getStocks(Connection c, int userid): This API retrieves stock information for a user based on the companies that user has selected. If the user has never specified any companies, stock info for the AMV_PROFILE_USER_STOCKS profile set of companies will be returned. If AMV_PROFILE_USER_STOCKS is not specified, then no data will be returned.

In summary, these are the possible cases of display:

- Company Name only
- Company Name + Stock Data
- Company Name + Stock Data + News
- Company Name + News

Using Oracle Marketing Encyclopedia

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Publishing

You can use the Publishing page to publish the following items:

- Messages
- Files
- URLs

Creating a Message

You can create a text message and send it to selected groups. Use this procedure to create a message.

Prerequisites

User type must be other than Viewer.

Steps

1. In the MES tab, choose **Publish.**
2. Select an Item Type of **Message.**

   The Publish page for messages appears.
3. Assign a title to your message and enter the name of the author.
4. Write your text.
5. Choose the groups to receive your message.
6. Enter a start date and duration.
7. Assign a priority that will place your message in the receiver's queue in relation to other messages.
8. Optionally, enter keywords to assist in content categorization and retrieval.
9. Click **Publish.**

   Confirmation of your publication appears.

If approval is required, then the message is sent to the correct person for approval.

If approval is not required, then the message is sent to the selected groups.

Publishing a File

You can publish any file and send it to selected groups and channels. Use this procedure to publish a file.

Prerequisites

User type must be other than Viewer.

Steps

1. In the MES tab, choose **Publish.**
2. Select an Item Type of **File.**

   The Publish page for files appears.
3. Enter a title and other header information.
4. Click **Upload File.**

   The Upload File page appears.
5. For each file, enter the file path and name or browse and choose the file and then click **Attach File.**
6. Optionally, select perspectives.
7. If you know the correct publishing channels for your file, then choose them from the list.
8. Optionally, choose the groups to receive your publication. The groups have their own channels in the My Channels page.
9. Optionally, enter keywords to assist in content categorization and retrieval.
10. Click **Publish.**

    Confirmation of your publication appears.

If you did not select a channel, then a channel is assigned that has attributes to match your publication's attributes, such as perspectives and keywords.

If approval is required for a channel, then the publication is sent to the correct person for approval. If approval is not required for a channel, then the file is sent directly to the channel.

Guidelines

In the author field enter the actual author of the file, not the publisher.

A higher priority file will be placed ahead of lower priority files in the queue awaiting publication.

Specify the channel name to publish to that channel. You do not need to match the attributes of the file to the attributes of the channel in order to publish to your specified channel.

Publishing a URL

A URL can be published and sent to selected groups and channels. Use this procedure to publish a URL.

Prerequisites

User type must be other than Viewer.

Steps

1. In the MES tab, choose **Publish.**
2. Select an Item Type of **URL.**

   The Publish page for URLs appears.
3. Assign a title for your URL.
4. Either enter or paste the full URL.
5. Enter a description, and other header information.
6. Optionally, select perspectives.
7. If you know the correct publishing channel for your URL, then enter it.
8. Choose the groups to receive your publication. The groups are assigned publishing channels.
9. Optionally, enter keywords to assist in content categorization and retrieval.
10. Click **Publish.**

    Confirmation of your publication appears.

If you did not select a channel, then a channel is assigned that has attributes to match your publication's attributes, such as group and keywords.

If approval is required for a channel, then the URL is sent to the correct person for approval (usually the channel creator). If approval is not required for a channel, then the URL is sent directly to the channel.

Guidelines

Specify the channel name to publish to that channel. You do not need to match the attributes of the URL to the attributes of the channel in order to publish to your specified channel.

Approving Items

An item published by a user without approval rights is automatically routed to the approver for the publication channel assigned to the item. Use this procedure to approve items for distribution.

Prerequisites

User type must be Group Administrator, Senior Group Administrator, or System Administrator.

Group Administrators can approve items published from their groups.

Senior Group Administrators can approve items published by any of the groups for which they have responsibility.

A System Administrator can approve any publication.

The timeout setting determines when an item and approval rights change to the next approver. Time out is set in workflow definition. The workflow time type name is AMV_APPR. The default approver for the channel can approve items published in the channel. When an item times out for that approver, then the approval rights move to the secondary approver for the channel. When the item times out with the secondary approver, then the approval rights move to the application level approver who can approve items published in any channel.

Steps

1. In the MES tab, choose **My Approvals.**

   A list of publications awaiting approval appears.

2. Select an **item to review the content in read-only form.**
3. If you want to approve the item for publication, then click **Approve.**

   The publication is released to its associated channels.

4. If you want to refuse publication, then click **Reject.**

   A message is sent to the originator of the publication.

Guidelines

You can have a bin that lists publications awaiting approval.

In your user profile you can set the number of approval notifications to be shown in the bin or in My Approvals.

Viewing Messages

Messages consist of text entered by the author and sent for publication. Use this procedure to view your messages.

Prerequisites

None

Steps

1. In the MES tab, choose **My Channels** and go to **the My Messages section.**
2. Optionally, use a bin to list messages that were published to My Messages.
3. Click the message title.

   The body of the message appears.

Guidelines

In your user profile you can set the number of messages to be shown in bins or in My Channels.

Viewing Notifications

Notifications appear when new items you submit for publication are approved or rejected. You also receive notification when your subscription to a channel is approved or rejected. Use this procedure to view your notifications.

Prerequisites

None

Steps

1. You can view a list of notifications in more than one way:
   - In the MES tab, choose **My Channels** and go to the **My Notifications section.**
   - Use a bin to list notifications.
2. Click the notification to review the information.

Guidelines

In your user profile you can set the number of notifications to be shown in a bin or in My Channels.

Viewing Published Items

Files are published in hierarchies of categories. Use this procedure to drill down to a desired file and view it.

Prerequisites

You must be granted access rights to the channel where the content resides.

Steps

1. In the MES tab, choose **Categories.**

   A hierarchy of categories and subcategories that are available to you appears.

2. Select a subcategory.

   A list of channels within the subcategory appears.

3. Select a channel.

   A list of published items appears for the selected channel.

4. Select the item to view.

   The published item appears.

Guidelines

You can also perform a search to find the file to view.

You can also view documents using My Channels.

Viewing My Channels

My Channels provides a customized view of the hierarchy of published items as well as your messages and notifications. Use this procedure to view information in My Channels.

Prerequisites

You must be granted access rights to channels.

Steps

1. In the MES tab, choose **My Channels.**

   My Channels displays the following:

   - Channels for groups of which you are a member
   - Channels that are pushed to you because they are required
   - Channels to which you have subscribed
   - Your private channels (information only available to you)
   - Your messages
   - Your notifications
   - Published items awaiting your approval

2. Select the item to view.

   The published item or message appears.

Guidelines

Drill down through the hierarchy of categories as needed.

References

See Subscribing for information on how to subscribe to available channels.

Adding Channels

Channels are needed to classify information and the distribution of that information. Use this procedure to add a new channel.

Prerequisites

A System Administrator can create any channel.

If you are not the system administrator, then you must have the setup channel privilege.

Steps

1. In the MES tab, choose **Administration > Create Channel.**

   The Create Channel page appears.

2. Choose a parent category for the new channel.
3. Assign a unique name to the channel and other definition information.
4. Choose whether the channel access is public or private.

5. Enter the content subscription criteria.
6. Enter approval information.
7. Click **Create** to save your new channel.

Guidelines

Message channels can only contain messages.

A channel belongs to a category.

You create a channel with private access to publish information that will only be available to you.

You create a channel with group access to grant access only to members of the assigned groups.

A group channel is automatically created when a group is created.

A channel will be matched with items based on its attributes (authors, keywords, content types, perspectives and item types).

Subscribing

You subscribe to a channel or subcategory by adding it to My Channels. Use this procedure to add or remove channels.

Prerequisites

You must be granted access rights to channels.

Steps

1. In the MES tab, choose **My Channels.**

   The My Channels page displays your current list of channels and subcategories.

2. In the Find a Channel to Add field, optionally enter search criteria, and then click **Go.**

   The Add a Channel to My Channels page displays the results of your query.

3. Select the desired channels and subcategories
4. Click **Subscribe.**

   The channel is added to your My Channels page immediately if no approval is required, or after required approval is given.

Guidelines

You can also perform a search to find the channel or subcategory to add.

Use the Remove button to remove a channel from your channels.

You can also add channels and subcategories to My Channels while you are viewing categories and channels. Click the plus next to the channel or subcategory that you want to add. A check mark appears next to channels and subcategories that you have already added. If you chose a subcategory, then a pencil icon appears next to the subcategory. Click the pencil icon and choose the channels.