

Oracle® Applications

Supplemental CRM Installation Steps

Release 11i

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This document provides instructions for completing your installation of Oracle CRM applications. Perform the supplementary steps described here **after** the general installation procedures described in *Installing Oracle Applications, Release 11i*.

Note: The Oracle CRM applications not listed in this manual do not require additional installation tasks.

This manual details the supplementary installation tasks for the Oracle CRM applications listed in the following table:

Product Family	Application(s)
CRM Tools and Technology	■ HTML Stack
Internet Business Applications	■ Oracle eMail Center
Call Center Applications	■ Oracle Telephony Manager
Communications and Utilities Applications	■ Oracle Network Logistics - NATS
	■ Oracle SDP Provisioning
	■ Oracle CRL Financials

1 CRM Tools and Technology

This section includes the supplemental installation tasks for the following Oracle CRM Foundation components:

- [HTML Stack](#)

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1.1 HTML Stack

1.1.1 Supplemental Installation Steps

If your Apache server is running on a UNIX platform, then set the file handle limit before restarting the Apache server. Depending on the UNIX shell you are running, the command will be a variation of the *ulimit* or *limit* command:

1. At the command line, verify the limit for descriptors (for example, *ulimit -n* or *limit*).
2. Set the limit for descriptors to 1024 (for example, *ulimit -S -n 1024* or *limit descriptors 1024*).
3. Verify your changes.

2 Internet Business Applications

This section includes the supplemental installation tasks for the following Oracle CRM applications:

- [Oracle eMail Center](#)

2.1 Oracle eMail Center

2.1.1 Supplemental Installation Steps

1. Install Oracle Email Server (OES) 5.2. Follow the instructions provided in the *Oracle Email Server Installation Guide* (Installing Oracle Email Server section). Oracle Email Server was formerly known as Oracle Internet Messaging (IM).

In the post-install Email Server configuration (imconfig), do not select the checkbox that says Enable LDAP. Your Oracle Email Server need not have an LDAP server running. Oracle eMail Center does not use LDAP server. For more information on this step, refer to the *Oracle Email Server Installation Guide* (Configuring Oracle Email Server section).

When the installation process is complete, you can configure the Oracle Email Server instance to communicate with the Oracle Applications Instance.

2. Create a sqlnet tnsnames entry on the Oracle Email Server machine to point to the Oracle Applications Instance.
3. Create a Database Link to the CRM instance from the Oracle Email Server instance. You need the following:

- Password for the Oracle Applications APPS schema
- Password for the Oracle Email Server OO schema

Use SQL*Plus to connect to Oracle Email Server database instance as the user **OO** and use the following syntax to create the database link:

```
CREATE DATABASE LINK <link name> CONNECT TO <APPS username>
IDENTIFIED BY <APPS password> USING <tns / service name>;
```

Note: The name of the above mentioned database link <link name> is used later to configure other eMC components.

2.1.2 Email Server Installation

Install Oracle Email Server either in the same APPS database or in a separate database on a different machine. Perform steps 1-4 in both scenarios.

Scenario 1: OES Installed in the APPS Database

1. The following OES components must be installed per the instructions provided in the OES installation manual.
 - Oracle Email Server 5.2
 - IMAP4 and POP3 protocol servers 5.2
 - Email Administrator 5.2
2. Email Server Post-Installation Tasks
 - a. Login as root and run root.sh from \$ORACLE_HOME.
 - b. Change the ownership of \$ORACLE_HOME/bin/ofcpsl file to root.
 - c. Modify the imconfig file to point to the correct JRE_HOME (JRE1.1.8) directory.
3. IM configuration
 - a. Login as oracle (OS user).
 - b. Set the DISPLAY environment variable according to your UNIX shell.

e.g., setenv DISPLAY <local terminal>:0.0

The following table shows examples.

Shell	Example
csH	setenv DISPLAY crmops.us.oracle.com:0.0
sh, ksh	DISPLAY= crmops.us.oracle.com:0.0; export DISPLAY

- c. Run imconfig under \$ORACLE_HOME/bin.
- d. Use the following table to enter the required information at the configuration prompts:

Prompt	Recommended Values or Guideline
Enter DomainName	Example: BARRACUDA_DOMAIN
Email Server Node	Choose either default node or custom node. (If uncertain, use the default email server node.)
First Oracle Email Server Node	yes
Enter Node name	Example: BARRACUDE_NODE
Set Password for User admin Password	Example: BARRACUDA
Set Password for Database Users	<ul style="list-style-type: none"> ■ OO password (ex: OO) ■ oraoffice password (ex: oraoffice) ■ OO_DS user password (ex: OO_DS) ■ OO_MAIL user password (ex: OO_MAIL) ■ OO_PUBLIC user password (ex: OO_PUBLIC) ■ OO_SCHED user password (ex: OO_SCHED)
Do you Want to Enable IMAP4 for Default SMTP Gateway?	yes
New Gateway Name	Use the default (smtp)
Enter Email Domain Name	Example: <db machine name>.us.oracle.com
ldap	no

4. Sendmail Configuration (UNIX side)
 - a. Copy the sendmail.cf file to /etc/mail.
 - b. Edit sendmail.cf to modify ORACLE_HOME, ORACLE_SID to OES database home, and database SID.
 - c. Use the following commands to check the ClassID:

```
cd $ORACLE_HOME/bin (OES DB)
ofcguard start (start/status/stop)
oomgr admin/<password> (ex: BARRACUDA)
IOFCMGR> show gateway all;
```

The ClassID appears.

- d. Check the ClassID from the database and put the same ClassID in the sendmail.cf.
5. Add user group aliases in the /etc/aliases file.

Scenario 2: OES Installed in a Separate Database

Perform the following steps when you install Oracle Email Server in a separate database.

1. A tns-service entry for the APPS database needs to be added in tnsnames.ora file (in /etc or /var/opt/oracle) in OES DB machine.
2. A tns-service entry for the OES database needs to be added in tnsnames.ora file (in /etc or /var/opt/oracle) in the APPS DB machine.
3. Verify that the SQL*Net connections from both databases work correctly.
4. Create the following database links in your Oracle Applications database:

- a. Using SQL*Plus login as the APPS user.

- b. Create the database link <IMLINK>:

```
connect to oraoffice identified by <oraoffice password> using
'<tns service name of OES dbname >';
```

- c. Create a database link to the <OOLINK>:

```
create database link <OOLINK> connect to <OO schemaname>
identified by <OO password> using '<tns service name of OES
dbname>';
```

5. Create the following database link in OES database:
 - a. SQL*Plus login as OO, using OO password that was entered during OES installation.
 - b. Create a database link <appslink> connecting to apps identified by <apps pas word> using <tns/ service name of APPS dbname>.
6. SQL*Plus login to OES DB as user OO_MAIL using OO_MAIL password that was entered during OES installation.

```
grant select on om_imt_msgpart to oraoffice;
```

3 Call Center Applications

This section includes the supplemental installation tasks for the following Oracle CRM applications:

- [Oracle Telephony Manager](#)

3.1 Oracle Telephony Manager

Implementation Requirements

Oracle Telephony Manager uses the Oracle Universal Installer to perform additional configuration steps on the web server node. You will need the *Oracle Call Center Applications Setup* CD in order to perform these steps.

Modules on the *Oracle Call Center Applications Setup* CD include:

- Oracle Scripting Author
- Oracle Telephony Manager and subcomponents (Telephony Media Control, Inbound Telephony Server, Routing Server, and Server Monitor)
- Oracle Email Center
- Oracle Universal Work Queue
- Oracle Interaction Blending

Refer to *Oracle Call Center Applications Setup* on the Oracle Call Center Applications Setup CD-ROM for additional implementation documentation.

4 Communications and Utilities Applications

This section includes the supplemental installation tasks for the following Oracle CRM applications:

- [Oracle Network Logistics - NATS](#)
- [Oracle SDP Provisioning](#)
- [Oracle CRL Financials](#)

4.1 Oracle Network Logistics - NATS

Using Oracle Network Logistics requires enabling triggers CUN_MASS_ADDITIONS_ARU and CUN_FA_RETIREMENTS_ARI. Accomplish this by running the cuntrg03.sql script on the admin tier.

Using SQL*Plus, run the script cuntrg03.sql against each APPS user:

```
sqlplus <APPS username>/<APPS password> @$CUN_  
TOP/patch/115/sql/cuntrg03.sql
```

4.2 Oracle SDP Provisioning

Oracle Provisioning interactive adapter uses a third-party software called Expect. Expect is a tool used primarily for automating and testing interactive applications such as telnet, ftp etc. Expect is packaged as a set of utilities that can be used as interpreted scripts and as a library that can be linked with the 'C' objects to form an executable. Additionally, Expect is free and in the public domain.

Oracle Provisioning interactive adapter uses Expect APIs and is required to be linked with the Expect and Tcl libraries. Expect uses Tcl, a general purpose scripting language, internally. Expect libraries are not distributed platform-wise. Instead, Expect comes packaged as a compressed TAR or ZIP file. Expect is supported on most Posix-compliant operating systems. Most UNIX and other popular platforms conform to Posix standards. The Expect package must be uncompressed on the target platform, and its library must be built using the installation notes which are included in the package.

Oracle does not distribute Expect related libraries along with its products. You are required to download, build, and optionally install Expect and Tcl libraries at your site. After required libraries are successfully built, the interactive adapter executable should be built using the steps documented in this section.

4.2.1 Building the Interactive Adapter Executable

The following required steps build the interactive adapter executable, XDPNTRCT for UNIX platforms:

1. Download and build Expect and Tcl libraries, libexpect5.30.a and libtcl8.0.a, in Expect and Tcl staging areas as per installation instructions enclosed in their respective packages. More details on Expect are available at <http://expect.nist.gov>.
2. Copy the Expect and Tcl libraries to \$XDP_TOP/lib directory on the Concurrent Processing (node) Tier.
3. Uncomment the following line from \$XDP_TOP/admin/driver/xdpsub01.drv:

```
# xdp          bin          XDPNTRCT
```

so that the line reads:

```
xdp          bin          XDPNTRCT
```

4. Build the Interactive adapter executable by running adadmin.
 - a. Select the option Relink Applications Programs.
 - b. Enter the values listed in the following table at the corresponding prompts:

Prompt	Value to Enter
Enter list of products to link ('all' for all products) [all]:	xdp
Generate specific executables for each selected product [No]?	yes
Enter executables to relink, or enter 'all' [all]:	XDPNTRCT

Successful completion of above step will build the required executable in \$XDP_TOP/bin. In case of errors, contact your Oracle Support representative.

4.3 Oracle CRL Financials

4.3.1 Enabled Assets

Perform the following steps before using CRL functionality.

4.3.1.1 Post-Installation

Setup CRL Profile (Required)

If you are licensed to use CRL-FA and want to use the CRL Fixed Assets functionality, then run the following script as the apps user.

```
$CUA_TOP/patch/115/sql/FACSTPRF.sql
```

4.3.1.2 Pre-Upgrade

If you already have CRL Enabled Assets installed and wish to upgrade to Oracle Assets/CRL 11i, please do the following to ensure successful upgrade.

1. Disable any CRL Enabled Assets responsibilities and Oracle Asset responsibilities. (Required)
2. Check CRL responsibility being used.

Caution: Oracle Assets 11*i* installs CRL with a seeded responsibility as CRL Assets Manager. Make sure that a responsibility with this name does not exist on your system at the time of upgrade.

4.3.1.3 Post-Upgrade

1. Setup CRL Profile (Required)

If you are licensed to use CRL-FA and want to use the CRL Fixed Assets functionality then run the following script as the apps user.

```
$CUA_TOP/patch/115/sql/FACSTPRF.sql
```

2. Setup Key Flexfields (Required)

The new key flexfields need to be configured to match the old flexfield configuration. The following table lists the new key flexfields and the corresponding old key flexfields that need to be re-configured.

Old Key Flexfield Name	Old Application Name	New Key Flexfield Name	New Application Name
Group Asset	Oracle CRL Enabled Assets	Group Assets	Oracle Assets
Super Group	Oracle CRL Enabled Assets	Super Group	Oracle Assets

3. Setup Descriptive Flexfields (Required)

The new descriptive flexfields need to be configured to match the old flexfield configuration. The following table lists the new descriptive flexfields and the corresponding old descriptive flexfields that need to be re-configured.

Old Desc Flexfield Name	Old Application Name	New Desc Flexfield Name	New Application Name
IFA_HIERARCHY_DESC_FLEX	Oracle CRL Enabled Assets	FA_HIERARCHY_DESC_FLEX	Oracle Assets
IFA_HIERARCHY_RULE_DESC_FLEX	Oracle CRL Enabled Assets	FA_HIERARCHY_RULE_DESC_FLEX	Oracle Assets

4. Drop obsolete tables ONLY after confirming that your data was successfully upgraded. (Optional)

Use the following script to delete these tables.

```
$CUA_TOP/patch/115/sql/FACDTAB.sql
```

- ifa_books_groups
- ifa_group_assets
- ifa_group_asset_default
- ifa_group_asset_rules
- ifa_group_deprn_detail
- ifa_group_deprn_rates
- ifa_group_deprn_summary
- ifa_super_groups
- ifa_super_group_rules
- ifa_mass_external_transfers
- ifa_mass_ext_retirements
- ifa_ext_inv_retirements
- ifa_mass_ext_ret_excepts
- ifa_parallel_workers
- ifa_system_controls
- ifa_asset_hierarchy
- ifa_asset_hierarchy_values
- ifa_hierarchy_rule_set
- ifa_hierarchy_rule_details
- ifa_exclude_hierarchy_levels
- ifa_asset_hierarchy_purpose
- ifa_mass_update_batch_headers
- ifa_mass_update_batch_details
- ifa_hr_retirement_headers
- ifa_hr_retirement_details
- ifa_hierarchy_controls
- ifa_hierarchy_distributions

- ifa_life_derivation_info
 - ifa_mc_group_deprn_summary
 - ifa_mc_group_deprn_details
 - ifa_mc_books_groups
 - ifa_mass_additions
5. Drop obsolete views ONLY after confirming that your data was successfully upgraded. (Optional)

Use the following script to delete these views.

```
$CUA_TOP/patch/115/sql/FACDVWS.sql
```

- IFA_ASSET_HIERARCHY_Dfv
- IFA_ASSET_HIERARCHY_PURPOSE_V
- IFA_ASSET_HIERARCHY_V
- IFA_ASSET_HIERARCHY_VALUES_V
- IFA_ASSET_HRCHY_DETAILS_V
- IFA_BOOKS_GROUPS_V
- IFA_BOOKS_GROUPS_V1
- IFA_CHILD_ASSETS_V
- IFA_CURR_DEPRN_ADJ_V
- IFA_DEPRN_GROUPS_V
- IFA_DEPRN_GROUPS_V1
- IFA_GROUP_ASSETS_KFV
- IFA_GROUP_COST_INQUIRY_V
- IFA_HIERARCHY_BATCH_DETAILS_V
- IFA_HIERARCHY_BATCH_HEADER_V
- IFA_HIERARCHY_DISTRIBUTIONS_V
- IFA_HIERARCHY_RULE_DETAILS_V
- IFA_HR_BATCH_DIST_NEW_V
- IFA_HR_BATCH_DIST_OLD_V
- IFA_HR_RETIREMENT_DETAILS_V
- IFA_HR_RETIREMENT_HEADERS_V
- IFA_MASS_EXTERNAL_TRANSFERS_V

- IFA_MASS_EXT_RETIREMENTS_V
 - IFA_MUPD_V
 - IFA_SOURCE_LINES_V
 - IFA_SUPER_GROUPS_KFV
 - IFA_LIFES_V
6. Reduce obsolete columns after confirming your upgrade. (Optional)
- Use the following script to delete these columns.
- ```
$CUA_TOP/patch/115/sql/FACDCOL.sql
```
- fa\_mass\_additions.group\_asset\_id
  - fa\_mass\_additions.ifa\_parent\_hierarchy\_id
  - fa\_category\_book\_defaults.ifa\_life\_end\_date
  - fa\_category\_book\_defaults.ifa\_rule\_set\_id
  - fa\_books.group\_asset\_id
7. Drop obsolete triggers after confirming your upgrade. (Optional)
- Use the following script to delete these triggers:
- ```
$CUA_TOP/patch/115/sql/FACDTRG.sql
```
- IFA_ADDITIONS_HR_ARD
 - IFA_ADJUST_UNITS_ARI
 - IFA_ADJUST_UNITS_ARU
 - IFA_ASSET_INVOICES_BRI
 - IFA_BOOKS_GROUPS_BRI
 - IFA_BOOK_CONTROLS_BRU
 - IFA_MASS_ADDITIONS_ARU
 - IFA_RETIREMENTS_BRU
 - IFA_RETIRMENTS_ARU
 - IFA_TRANSACTION_HEADERS_ARI2
 - IFA_TRANSACTION_HEADERS_ARI3
 - IFA_TRANSACTION_HEADERS_HR_BRI
8. Drop obsolete packages after confirming your upgrade. (Optional)
- Use the following script to delete these packages:

\$CUA_TOP/patch/115/sql/FACDPKG.sql

- IFADEPR
 - IFA_ASSET_APIS
 - IFA_ASSET_WB_APIS_PKG
 - IFA_BOOKS_GROUPS_PKG
 - IFA_CALC_NBV_PKG
 - IFA_CLIENT_EXTENSION
 - IFA_DERIVE_ASSET_ATTR_PKG
 - IFA_EXT_TRANSFERS_PKG
 - IFA_FLEX_BLD_PKG
 - IFA_FLEX_BUILD_PKG
 - IFA_GROUP_RET_ADJ_PKG
 - IFA_HIERARCHY_DISTRIBUTION_PKG
 - IFA_HIERARCHY_PKG
 - IFA_HIERARCHY_PURPOSE_PKG
 - IFA_HIERARCHY_RULE_DETAILS_PKG
 - IFA_HIERARCHY_VALUES_PKG
 - IFA_HR_REINSTATEMENTS_PKG
 - IFA_HR_RETIREMENTS_PKG
 - IFA_INVOICE_TRANSACTIONS_PKG
 - IFA_MASS_EXT_RET_PKG
 - IFA_MASS_UPDATE1_PKG
 - IFA_MASS_UPDATE2_PKG
 - IFA_RECLASS_PKG
 - IFA_SYSTEM_CONTROL_PKG
9. Refer to the Oracle CRL Financials Implementation Guide on the Oracle Applications, Release 11i Documentation CD-ROM for additional post-installation and implementation tasks. (Required)

4.3.2 CRL Enabled Projects

Perform the following post installation/upgrade steps to use the CRL Projects functionality.

1. Setup CRL Profile

If you are licensed to use CRL-PROJECTS and want to use the CRL Projects functionality then set the profile PA:Licensed to use CRL projects to Yes at the site level.

2. The CRL Projects Manager responsibility must be enabled by setting the effective end date to null.
3. The two client extensions packages for CRL - Project customers must be modified to uncomment the default CRL Projects functionality and applied. The packages are:

- PA_CLIENT_EXTN_CIP_GROUPING (IPAGCEB.pls)
- PA_CLIENT_EXTN_GEN_ASSET_LINES (IPAGALCB.pls)

4. Setup Descriptive Flexfields (Required)

Descriptive flexfields must be configured as documented in Oracle CRL-Financials Enabled Projects Concepts and Procedures, Release 11i. This setup must be done manually.

The following table lists the new key flexfields and the corresponding old key flexfields that need to be re-configured.

Descriptive Flexfield Name	Columns	Value Set Used	Application Name
Expenditure Items	Attribute8 Attribute9 Attribute10	Depends on the naming convention. Refer to the <i>Oracle CRL Projects Concepts and Procedures</i> manual.	Oracle Projects
Expenditure Types Desc flex	Attribute9 Attribute10	PA_SRS_YES_NO_LOV PA_SRS_YES_NO_LOV	Oracle Projects
Projects	Attribute10	PA_SRS_YES_NO_LOV	Oracle Projects
Tasks	Attribute9	PA_SRS_YES_NO_LOV	Oracle Projects

- For new CRL customers, make sure these descriptive flex field attributes are not used for other purposes. In addition, CRL post-installation/upgrade mandatory patch 1238551 needs to be applied.
- Existing CRL Projects users must verify with these descriptive flexfields for accuracy.

5. Refer to the Oracle CRL Financials Implementation Guide on the Oracle Applications, Release 11i Documentation CD-ROM for additional post-installation and implementation tasks. (Required)

