

Oracle® Campaign Plus

Installing Oracle Campaign Plus

Release 11i for Windows NT

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Installation Overview

To properly install Oracle Campaign Plus, you must perform the following high-level steps:

1. Install the DCE cell services.

For more information on installing DCE, please refer to the Entegrity Solutions (Gradient) documentation.

The DCE Cell services can be installed anywhere in the local network: they are often installed on the Call Center Connectors server. If the DCE Cell services are installed on a different machine from Oracle Campaign Plus, then you must install DCE Client 4.0 on the Oracle Campaign Plus machine(s). DCE Client 4.0 must also be installed on all machines running Oracle Integrated Manager.

2. Install Oracle Client 8.0.6 with ODBC 8.0.6.2.
3. Install Oracle Campaign Plus Server.
4. Install Oracle Integrated Manager.

Oracle Integrated Manager is the user interface that allows you to administer and monitor Oracle Campaign Plus.

5. Run DCE scripts (against the cell).

Once installation is complete, you can refer to the *Oracle Campaign Plus Concepts and Procedures Guide* or the *Oracle Campaign Plus and Oracle Predictive Implementation Guide* to create Oracle Campaign Plus services.



Installation Requirements

Installation requirements describe the recommended hardware and software needed to run Oracle Campaign Plus. You should consider these requirements the recommended configuration. While your installation may function with less than these requirements, system performance may degrade during periods of heavy usage or with larger configurations. Thoroughly review the installation requirements to be sure your call center has the hardware and software to effectively run Oracle Campaign Plus.

Hardware Requirements

Oracle Campaign Plus should be installed on a network-connected, NT server-class machine. Oracle Integrated Manager can be installed on a network-connected NT workstation.

The hardware requirements for Oracle Campaign Plus and Oracle Integrated Manager are as follows:

Hardware	Recommended Requirement
Computer	Pentium 450 MHz with Y2K fixes
Operating System	Microsoft Windows NT 4.0 (Service Pack 5)
Hard Drive	1 GB free space
Other Drives	CD-ROM drive, or the ability to access a CD-ROM drive over the network
Monitor	256 color display
RAM	128 MB
Miscellaneous	Mouse or other pointing device

Note: System size, number of users, and configuration may directly impact your individual requirements. Please confer with your Oracle Consultant about your specific requirements.

Windows NT User Accounts

Installation and maintenance of Oracle Campaign Plus services will require the setup of Windows NT user accounts. These accounts will need administrator-level user rights to each server running an Oracle Call Center service, including Oracle Campaign Plus and Oracle Predictive services, or running any third party product that Oracle is responsible for installing or configuring, such as CT-Connect. The creation of user accounts for administration of Oracle CRM services is the responsibility of the customer.

A user account belonging to the built-in Administrator group and having the right to log on as a service should be sufficient. Oracle user accounts are usually local to an Oracle CRM application server. If this is the case, a user account will have to be created for each Oracle CRM server. When performing maintenance on Oracle CRM application servers, you should always use the Oracle CRM user account set aside for that purpose.

Software Requirements

For Oracle Campaign Plus to operate correctly, you must have the proper supporting software installed in the network. This software includes the Oracle 8i database, Oracle CRM Foundation components (including Oracle Interaction History), Oracle Marketing Online, Oracle Universal Work Queue, Oracle TeleSales (as the business application), Oracle Client 8.0.6 and Oracle ODBC Driver 8.0.6.2, Oracle Telephony Manager with Oracle Call Center Connectors, PC-DCE 4.0, Oracle Call Center Connectors, Oracle Integrated Manager, and Dialogic CT-Connect 5.0 or Cisco ICM. Any machine running Oracle Integrated Manager also requires Microsoft Internet Explorer 4.01 or higher (with active desktop installed, but not necessarily active) and Microsoft Management Console 1.1.

Databases The Oracle CRM system database must be installed and configured prior to installation of Oracle Campaign Plus. You will be required to enter database information during installation and configuration of Oracle Campaign Plus.

Dialogic CT-Connect Client 5.0 or Cisco ICM These products are server-based middleware that provide a command interface between computers and telephony (computer-telephony integration or CTI). They enable Oracle Predictive and Oracle Telephony Manager to issue telephone switch commands to the ACD/PBX to dial calls, transfer calls to the agent desktop, and perform other telephony functions.

Oracle ODBC Driver 8.0.6.2 ODBC provides database connectivity. The system administrator must define the system DSN (data source name) using the Oracle ODBC Driver 8.0.6.2.

Client/Server Communications and DCE Oracle Campaign Plus software communicates with Oracle CRM vertical applications over a local area network (LAN).

Oracle Campaign Plus is based on client/server architecture, in which some processes are distributed among two or more computers. To facilitate communication between machines, the software operates within a Distributed Computing Environment (DCE). A specific instance of a distributed computing environment is called a "cell".

Within the cell, the DCE cell server keeps track of DCE clients. When a DCE client boots, it reports itself to the DCE cell. Within the client/server architecture, when a client needs the services of a server, the DCE client informs the DCE cell and the cell connects the client to the server.

Oracle Campaign Plus requires Entegrity Solutions (Gradient) PC-DCE version 4.0.

Install Entegrity Solutions (Gradient) PC-DCE according to their instructions.

Oracle DCE configuration scripts install the DCE directories required in the cell by the Oracle Campaign Plus services.

Installation Prerequisites

The following tasks must be performed before installing Oracle Campaign Plus:

- The Oracle CRM system database must be installed and working.
- Oracle Client 8.0.6 must be installed and working on the Oracle Campaign Plus server machine, along with Oracle ODBC Driver 8.0.6.2.

The additional products identified earlier under Software Requirements must be installed and working in order to use Oracle Campaign Plus and Oracle Predictive in a production environment. Specifically, Oracle Marketing Online must be installed and working to provide Oracle Campaign Plus and Oracle Predictive with a source of callable records, and Oracle TeleSales with Oracle Universal Work Queue is the current business application that is enabled to work with Oracle Campaign Plus and Oracle Predictive.

Installation Worksheets

Installation worksheets are designed to help you gather the information required to install Oracle Campaign Plus. The information requested on the worksheets is entered during the installation process. To successfully install Oracle Campaign Plus, please follow the worksheets.

Oracle Campaign Plus Installation Worksheet

Please complete the following:

- The DCE cell requires using a "principal" (similar to a username) and an associated password to gain administrative access. The standard (and recommended) principal name is "cell_admin". The default password is "nexus", but you are encouraged to choose your own password.

- Identify the destination directory for the Oracle Campaign Plus files. Choose one:
 - Accept the default (strongly recommended), or
 - Choose a different destination directory: _____
- Identify the database identifier for the system database.
 - Oracle CRM database found in tnsnames.ora: _____
- Identify the Windows NT administrator-level user account set up on the server that will be used to run Oracle Campaign Plus.

Oracle Integrated Manager Installation Worksheet

If you have not yet installed Oracle Integrated Manager as part of another Call Center product installation, please complete the following:

- Identify the destination directory for the Oracle Integrated Manager files. Choose one:
 - Accept the default (strongly recommended), or
 - Choose a different destination directory: _____
- Select a setup type for Oracle Integrated Manager. Choose one.
 - **Administrator.** Installs the necessary files to allow administrative operations within Oracle Integrated Manager.
 - **Custom.** Allows you to choose specific snap-ins, sample consoles, and utilities to run with Oracle Integrated Manager.
 - **Minimal.** Installs the minimum required files to run Oracle Integrated Manager.
 - **Supervisor.** Installs the necessary files to allow supervisory operations within Oracle Integrated Manager.
- Identify the program folder for Oracle Integrated Manager. Choose one.
 - Accept the default, or
 - Choose a different program folder: _____

What are Installation Tasks?

The installation tasks are step-by-step instructions that guide you through the installation process. Many of the tasks are wizard based. You should follow them in the order presented to ensure that all steps needed to install Oracle Campaign Plus are completed.

There are several separate installation tasks required to install Oracle Campaign Plus. In the first task you install DCE, then the Oracle Campaign Plus application software on the designated Oracle Campaign Plus server.

Next, you install Oracle Integrated Manager on the administrator's and supervisors Windows NT workstations. Oracle Integrated Manager helps you configure and use Oracle Campaign Plus.

Installing and Configuring PC-DCE

If you have not already installed DCE as part of another Call Center product installation, refer to the Entegrity Solutions (Gradient) installation guide for instructions on installing PC-DCE. To protect your original Entegrity Solutions (Gradient) License Pack file, Oracle recommends that you copy the Entegrity Solutions (Gradient) License Pack to another disk, and use the copy of the file instead of the original.

Installing Oracle Campaign Plus

Use this procedure to install Oracle Campaign Plus on the designated Windows NT server.

Prerequisites

Before you can install Oracle Campaign Plus, you must first install Entegrity Solutions (Gradient) PC-DCE and Oracle Client 8.0.6 with Oracle ODBC Driver 8.0.6.2.

Note: Throughout this procedure, use of the default destination is strongly recommended.

Steps

1. Place the installation CD in the CD-ROM drive of the designated Oracle Campaign Plus server.

If the setup program does not start automatically, go to the root directory on the installation CD and run setup.exe.

Note: When manually starting the setup program, be sure to select the main setup.exe so that all of the installation product options will be presented.

2. The main setup program window appears. Click **Oracle Call Center Services**.
3. The setup program is initialized and the Welcome dialog box appears. Click **Next**.
4. The Software License Agreement dialog box appears. Click **Yes** to accept the terms of the license agreement.
5. From the User Information dialog box type your name and company and then click **Next**.
6. The Choose Destination Location dialog box appears. The Destination Folder area displays the default destination folder for the files. If this location does not exist, the setup program will create it.

You have the following options:

- Click **Next** to accept the default destination folder
 - Click **Browse** to choose another destination folder or create a new destination folder and (when you return to the Choose Destination Location dialog box) then click **Next**.
7. Select **Custom setup** and then click **Next**.
 8. From the Select Components box, first clear all check boxes then select the following components:
 - Oracle Campaign Plus
 - Oracle Directory Maintenance
 - Oracle Service Monitor

Note: If you have previously installed Oracle Predictive or Oracle IVR Integrator, the dialog box lists the previously installed components and asks if you wish to overwrite them. If you wish to use the same components in the same directory locations as the previous install, leave the check boxes unchecked and click **Next**.

Click **Next**.

9. The Select Program Folder box appears, displaying the default program folder. If this program folder does not exist, the setup program will create it automatically.

You have the following options:

- Click **Next** to accept the default program folder

- Select another program folder in the Existing Folders box and then click **Next**.
 - Type a new program folder in the Program Folders box and then click **Next**.
10. In the Account box, type the login for the Windows NT user account or group account that will be used to administer Oracle Campaign Plus. It is highly recommended to use a group account for this function. The user you are currently logged in as becomes the default account. To specify a different domain and/or user, type the domain\account. Click **Next**.

Note: Oracle suggests creating an Administration User Group as opposed to an individual account. This group should be entered as the account, thereby allowing multiple users to later have access to the shares when administering Oracle Campaign Plus or Oracle Predictive through Oracle Integrated Manager on a local Windows NT PC.

11. Review the setup parameters summary. Click **Next** to accept. The setup program starts installing Oracle Campaign Plus. It provides status of the installation. When the installation is finished the setup program prompts you to create ODBC system data sources.
12. Click **OK**. The ODBC Data Source Administrator appears.
13. If you have not already done so, use the ODBC Data Source Administrator to create ODBC system data sources for the Oracle CRM system database. Use the data source names identified in the Worksheet for Oracle Campaign Plus Installation. In the ODBC Data Source Administrator dialog box, click **OK** to save your data sources and close the ODBC Data Source Administrator dialog box and return to the setup program; otherwise, click **Close**.
14. Select **Yes, I want to restart my computer now** option and remove the installation CD from the drive. Click **Finish**.
15. If you have not already done so as part of an installation of Oracle Predictive, run the configuration scripts against DCE. Oracle DCE configuration scripts install the DCE directories required by the services. The configuration scripts should be located in the "DCEConfiguration" directory in the directory tree specified when Oracle Campaign Plus was installed (usually \Oracle\DCEConfiguration).

Note: These scripts must be run after you restart your computer.

16. You may now move to the administrator's and supervisor's workstations and install Oracle Integrated Manager. Refer to the "Installing Oracle Integrated Manager" section in this document for detailed steps.

Oracle Integrated Manager can also be installed on the Oracle Campaign Plus server machine if desired.

Installing Oracle Integrated Manager

Oracle Integrated Manager is the administrative tool necessary to create and manage Oracle Campaign Plus and Oracle Predictive services. If you have not already done so, you should install Oracle Integrated Manager now.

Prerequisites

Before you can install Oracle Integrated Manager on any machine, you must first install Internet Explorer 4.01 or higher (with Active Desktop), Oracle Client 8.0.6 with Oracle ODBC Driver 8.0.6.2, and DCE Client 4.0 on that machine.

Note: Throughout this procedure, use of the default destination is strongly recommended.

Steps

1. Place the installation CD in CD-ROM drive of the administrator's or supervisor's workstation.

If the setup program does not start automatically, go to the root directory on the installation CD and run setup.exe.

The main setup program window appears.

2. Click **Oracle Integrated Manager**.
3. The setup program initializes and the Welcome dialog box appears. Click **Next**.
4. The Software License Agreement dialog box appears. Click **Yes** to accept the terms of the Software License Agreement.
5. Type your name and company and then click **Next**.

6. The Choose Destination Location dialog box appears. The Destination Folder area displays the default destination folder for the files. If this location does not exist, the setup program will create it for you. You have the following options:

- Click **Next** to accept the default destination folder
- Click **Browse** to choose another destination folder or create a new destination folder.

7. Select install options. Note that the initial installation displays **Both** as the only option. Click **Next**. Post initial installation will have the following options:

Both. Installs both Oracle Integrated Manager components and Oracle Integrated Manager service controls.

Oracle Integrated Manager Components. Installs only Oracle Integrated Manager components.

Service Controls. Installs only Oracle Integrated Manager service controls.

8. From the Setup Type dialog box, select the desired setup option. You have the following options:

Administrator installs the necessary files to allow administrative operations within Oracle Integrated Manager.

Custom allows you to choose specific snap-ins, sample consoles, and utilities to run with Oracle Integrated Manager.

Minimal installs the minimum required files to run Oracle Integrated Manager.

Supervisor installs the necessary files to allow supervisory operations within Oracle Integrated Manager.

If Administrator, Minimal, or Supervisor is selected, click **Next**. The Oracle Integrated Manager dialog box appears. Go to step 10.

If Custom is selected, click **Next**. The Select Components dialog box appears. Continue to step 9.

9. From the Select Components box, first clear all check boxes then select the desired components. Oracle Campaign Plus requires all the components to operate properly. If you are reinstalling a specific component, then select from the following:

Snapins installs Primary, Monitoring, Operations, and Service Configurations snapin components.

Utilities installs ACD Pipe control, Oracle Predictive Message control, and Registry Configuration control.

Sample Consoles installs sample consoles that provide common functionality for Administrator, Supervisor, Monitoring, and Registry Configuration. It also includes a empty console that you can customize.

Note: All the options must first be unchecked, then selected to ensure all subcomponents are installed.

Note: Click **Change** to select individual sub-components for each of the listed components.

10. Click **Next**.

11. The Program Folders box displays the default program folder for the programs. If this program folder does not exist, the setup program will create it for you.

You have the following options:

- Click **Next** to accept the default program folder
- Select another program folder in the Existing Folders box and then click **Next**.
- Type a new program folder in the Program Folders box and then click **Next**.

12. Review the setup parameters summary. Click **Next**. The setup program starts installing Oracle Integrated Manager. It provides status of the installation.

Note: Three message windows will appear in succession. The first is a message about installing Internet Explorer 4.0 (click **OK** to continue), the second is a message about installing Entegrity Solutions (Gradient) DCE (click **OK** to continue), the third is a message about the registry settings (click **OK** to clear).

13. Select **Yes, I want to restart my computer now** and remove the installation CD from the drive. Click **Finish**.

You have now completed the installation of Oracle Integrated Manager. Refer to the *Oracle Campaign Plus Concepts and Procedures Guide* or the *Oracle Campaign Plus and Oracle Predictive Implementation Guide* for information about creating individual Oracle Campaign Plus services.

