

Oracle[®] Marketing Online

Implementation Guide

Release 11*i*

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ORACLE[®]

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Oracle Marketing Online Implementation Guide, Release 11i

Part No. A87328-03

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Preface

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

This Implementation Guide provides information and instructions to help you work effectively with Oracle Marketing Online.

This preface explains how this guide is organized and introduces other sources of information that may be helpful to you.

Structure

This guide is optimized for online help. It is written in short, self-contained, task-oriented topics linked together with hyperlinks. Using this document in printed form does not permit you to follow the hyperlinks between topics.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program web site at <http://www.oracle.com/accessibility/>.

Intended Audience

This Implementing Guide is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle ERP applications only.

Note: You should be an experienced system administrator and have a good understanding of Oracle ERP applications before continuing with the procedures in this Implementation Guide.

Related Documentation and Resources

The following documents are useful for implementing Oracle Marketing Online:

Oracle Marketing Online Concepts & Procedures 11i

This guide provides a basic understanding of the concepts of Oracle Marketing Online and the procedures for using the application.

Oracle Applications Concepts

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

Oracle Applications System Administrator's Guide

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 to integrating Oracle Marketing Online with Oracle Web Discoverer.

Oracle Pricing User's Guide

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

Oracle System Administrator's Guide

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

Implementing CRM Applications Release 11i

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

CRM Foundation Implementation Guide

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

Oracle Inventory User's Guide

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

Discoverer 3i Installation & Administration Guide Release 3.3 for the Web

This guide outlines the implementation steps for Oracle Web Discoverer.

BIS11i Implementation Guide

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

Implementing Oracle Marketing Online

The implementation group of topics explains how to set up and customize Oracle Marketing Online.

You can customize Oracle Marketing Online 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 Administration 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*, Implementation Appendix
- *Implementing CRM Applications Release 11i*, 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 Administration 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)
17. [Set up geographical regions.](#) (Optional)
18. [Map your customer model.](#) This step requires consulting help. (Optional)
19. [Set up system profile options.](#) (Required)
20. [Implement Oracle Web Discoverer.](#) (Required)
21. [Set up news and stock quotes for user's home pages.](#) (Optional)

Setting Up the Implementation User

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

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*. (Required)

Implementing Oracle General Ledger

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

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 \$PROFILE\$\$ 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 the HR business groups you 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

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*.

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

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 item on the side panel menu.
 - **Note types:** These are used in the Notes item on the side panel menu in the field Note Types.
 - **Source to Note-Type Mapping:** This determines which notes show up in the Note item on the side panel menu 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 responsibility.
 - b. Run the concurrent program Load Geographic Hierarchies.

Guidelines

Refer to the corresponding topic in *CRM Foundation Implementation Guide*. You can find relevant information on 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

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.

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

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

- **System:** The implementer can only change the wording of the choices the user sees in the List of Values (LOV). 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 item on the side panel menus 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 item on the side panel menu.
- 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 item on the side panel menu.
- 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 | Administration > Custom Setup | Enables one or both of the following fields: Theme Approval, Budget Approval | System |
| | BUDGET | Budget | | | |
| | THEME | Theme | | | |
| AMS_ATTACHMENT_TYPE | FILE URL | File URL | Attachment item on the side panel menu used in all tabs. | Type (Classification for attachments) | Extensible |
| 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 | Administration > General > Marketing Medium | Rating | Extensible |
| | EXCELLENT | Excellent | | | |
| | GOOD | Good | | | |
| | MODERATE | Moderate | | | |
| | VGOOD | Very Good | | | |
| AMS_CHANNEL_TYPE | EXTERNAL | External | Administration > 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 > <i>any campaign > Deliverable > any deliverable</i> | 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 > <i>any execution event</i> | Delivery Method | Extensible |
| | ON_SITE | On Site | | | |
| | WEB | Web | | | |
| AMS_EVENT_AGENDA_STATUS | CONFIRMED | Confirmed | Event > Execution Event > <i>any execution event > Agenda</i> | Status (event agenda) | System |
| | UNCONFIRMED | Unconfirmed | | | |
| AMS_EVENT_ATTENDANCE_FAILURE | AGENDA_CHANGE | Agenda Change | Event > Execution Event > <i>any execution event > Registration > View Reason</i> (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 > <i>any execution event > Registration</i> | 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 > <i>any event</i> > 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 > <i>any execution event</i> > Registration | Rule (for wait list) | System |
| AMS_FCAST_BASE_UOL_SOURCE | | | For Trade Management marketing applications only. Affects budgets and claims. | | |
| AMS_FCAST_PERIOD_VIEW | | | For Trade Management marketing applications only. Affects budgets and claims. | | |
| AMS_FCAST_UOM | CS | CS | For Trade Management marketing applications only. Affects budgets and claims. | | Extensible |
| | EA | EA | | | |
| | USD | USD | | | |

Oracle Marketing Online Lookups

| Lookup Type | Code | Meaning | Affected areas | Field | Access Level |
|---------------------------|------------------------|------------------------|---|-------------------|--------------|
| AMS_FND_ALLOC_ALLOC_BASIS | EVEN | Even distribution | Budget > Allocation' | | Extensible |
| AMS_FND_ALLOC_UOM | USD | USD | Unit of measure for fund allocations | | Extensible |
| AMS_FORMULA_TYPE | ALLOCATION | Allocation | For Trade Management marketing applications only. Affects budgets and claims. | | Extensible |
| | HOLDBACK | Hold Back | | | |
| AMS_FUND_SOURCE | CAMP | Campaign | Campaign > <i>any campaign</i> > 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-INC COMPLETE | Processed - Incomplete | | | |
| AMS_IMPORT_TYPE | EVENT | Event | Audience > Import > <i>any list</i> | 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 | | | |

Oracle Marketing Online Lookups

| Lookup Type | Code | Meaning | Affected areas | Field | Access Level |
|--------------------------|-----------------|-----------------|--|-------------------------------------|--------------|
| AMS_LIST_ROW_SELECT_TYPE | NTH_RECORD | Nth Record | Audience > Audience > <i>any list</i> | Selection Size | System |
| | RANDOM | Random | | | |
| | STANDARD | Standard | | | |
| AMS_LIST_SEARCH | A | All lists | Audience > Audience | View | System |
| | U | My lists | | | |
| AMS_LIST_SELECT_ACTION | EXCLUDE | Exclude | Audience > Audience > <i>any list</i> Selection criteria for Action fields | Action | System |
| | INCLUDE | Include | | | |
| | INTERSECT | Intersect | | | |
| AMS_LIST_SELECT_TYPE | CELL | Target Segment | Audience > Audience > <i>any list</i> | Type | System |
| | DIWB | WorkBook | | | |
| | LIST | Existing List | | | |
| AMS_LIST_STATUS | ARCHIVED | Archived | Audience > Audience > <i>any list</i> | Status | System |
| | AVAILABLE | Available | | | |
| | LOCKED | Locked | | | |
| | NEW | New | | | |
| | PENDING | Pending | | | |
| | RESERVED | Reserved | | | |
| AMS_LIST_TYPE | TARGET | Target | Audience > Audience > <i>any list</i> | Type | System |
| | TEMPLATE | Template | | | |
| AMS_MARKET_ELIG_TYPE | GEO_AREA | Geographic Area | Budget > <i>any budget</i> > Allocation | Trade Management marketing use only | System |
| | MARKET_SEGEMENT | Market Segment | | | |
| | TERRITORY | Territory | | | |

Oracle Marketing Online Lookups

| Lookup Type | Code | Meaning | Affected areas | Field | Access Level |
|---------------------------|------------------|-----------------------------|---|--|--------------|
| AMS_MEDIA_TYPE | BROADCAST | Advertising | Administration > Activity | Activity Type | System |
| | DEAL | Deal | (affects all Activity Type fields in campaigns) | | |
| | 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 | | | |
| AMS_METRIC_ACCRUAL_TYPE | FIXED | Fixed | For internal system use only. Does not affect UI | | System |
| | VARIABLE | Variable | | | |
| AMS_METRIC_VALUE_TYPE | N | Numeric | Administration > 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 | ACC RUE | Accrue | Campaign > Rollup or Execution Campaign > any campaign > Offers > lump-sum offer | Payment Type (in Lumpsum offers only) | Extensible |
| | CHECK | Issue Check | | | |

Oracle Marketing Online Lookups

| Lookup Type | Code | Meaning | Affected areas | Field | Access Level |
|----------------------------|-------------|-------------------|---|--------------|---------------------|
| AMS_OFFER_STATUS | ACTIVE | Active | Campaign > <i>any campaign</i> > Offer | Status | System |
| | CLOSED | Closed | | | |
| | DRAFT | Draft | | | |
| | PENDING | Pending | | | |
| | REJECTED | Rejected | | | |
| AMS_OFFER_TYPE | ACCRUAL | Accruals | Campaign > <i>any campaign</i> > Offer | Type | System |
| | LUMPSUM | Lump Sum | | | |
| | OFF_INVOICE | Off Invoice | | | |
| | OID | Promotional Goods | | | |
| | ORDER | Order value | | | |
| AMS_PRIORITY | FAST_TRACK | Fast Track | Campaign > <i>any campaign</i> | Priority | Extensible |
| | HIGH | High | | | |
| | STANDARD | Standard | | | |
| | LOW | Low | | | |
| | MEDIUM | Medium | | | |
| | VERY HIGH | Very High | | | |
| AMS_PRODUCT_LEVEL | FAMILY | Product Family | Campaign > <i>any campaign</i> > Products | Level | System |
| | PRODUCT | Product | | | |
| AMS_RESOURCE_STATUS | BOOKED | Booked | Event > Execution Event > <i>any event</i> > Resources | Status | System |
| | CONFIRMED | Confirmed | | | |
| AMS_TRIGGER_FREQUENCY_TYPE | DAILY | Daily | Campaign > <i>any campaign</i> > Trigger > Setup | Frequency | System |
| | HOURLY | Hourly | | | |
| | MONTHLY | Monthly | | | |
| | NONE | None | | | |
| | QUARTERLY | Quarterly | | | |
| | WEEKLY | Weekly | | | |
| | YEARLY | Yearly | | | |

Oracle Marketing Online Lookups

| Lookup Type | Code | Meaning | Affected areas | Field | Access Level |
|-------------------------|-------------------|--------------------|--|------------------|--------------|
| AMS_TRIGGER_TYPE | DATE | Date | Campaign > <i>any campaign</i> > 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 | Administration > General > Venue | Venue Type | User |
| | HOTEL | Hotel | | | |
| | KIOSK_BOOTH | Kiosk/Booth | | | |
| OZF_FUND_REQUEST_STATUS | APPROVED | Approved | Campaign > <i>any campaign</i> > Budget | Status | System |
| | PENDING | Pending Approval | | | |
| | REJECTED | Rejected | | | |
| 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 | Trade Management 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 | Trade Management marketing use only. Affects budgets and claims. | Utilization Type | System |
| | ADJUSTMENT | Adjustment | | | |
| | UTILIZED | Utilized | | | |

Setting Up Status Classifications

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 **Administration > Setup > User Status**.
2. In a blank record, use the Activity drop-down list to 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

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 **Administration > Setup > Category**.
2. If you wish to create new categories, then:
 - a. Click **Create**.

The Create Category subtab appears.
 - b. Enter the name of the new category or subcategory. This name will appear in the Category or Subcategory drop-down list.
 - c. From the Created For drop-down list, select the object for which you are creating this category or subcategory.
 - d. If you are creating a subcategory, then, in Parent Category, click **Go** and use the list of values to enter the parent category.
 - e. Leave Liability Account and Adjustment Account blank. These are used by Trade Management marketing implementations only.
 - f. Enter an optional description.
 - g. Make sure the **Enabled** check box is selected. Deselecting removes this category or subcategory from use.
 - h. Click **Create**.
3. If you wish to edit an existing category, then:
 - a. Click on the category link.

The Create Details subtab appears.
 - b. Make your modifications.
 - c. Click **Update**.

Enabling the Budget Tab

Use this procedure to enable the budget tab.

Prerequisites

None

Steps

1. Log in 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

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 when 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 Geographical Regions

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 **Administration > 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 **Administration > 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**.

Setting Up Approval Rules

Use this procedure to set up default approval rules. Oracle Marketing Online uses this default for all approvals until you specify detailed approval rules. For example, if you define an approval process for campaigns, but have not yet defined a process

for events, the default approver will receive the approval notification for event related requests.

Note that the user initiating the approval process will always receive the 'FYI' notification.

Prerequisites

None

Steps

1. Setup a Default Approval Role
 - a. Log into Oracle Application (Forms Interface).
 - b. Click **CRM Resource Manager Responsibility**.
 - c. Create Role Type using **Setup > Role Types**.
 - d. Add new code using block letters, as follows:
Code=AMSAPPR

(Meaning: Default Marketing Approver, Description: Default Marketing Approver, Enabled=Y)
 - e. Save the transaction.
2. Create Role
 - a. Navigate to **Setup > Roles**.
 - b. Enter the following values:
Code: AMS_DEFAULT_APPROVER
Name: Default Marketing Approver Role
Type: Default Marketing Approver (This is the type created in step 1.)
Description: Default Marketing Approver Role
Manager='Y'
Active='Y'
 - c. Save the transaction.
3. Associate an existing Resource with above created Role.
 - a. Navigate to **Maintain Resources > Resource**.

- b. Select your resource for the role.
 - c. Click the **Resource Detail** button.
The system displays information on the chosen resource.
 - d. Click the **Roles** tab and enter the following values:
Role Type: Default Marketing Approver
Role: Default Marketing Approver Role
Manager='Y'
 - e. Save the transaction.
4. Set Cut-off percentage for Approvals.
 - a. From the Form Interface at login, select System Administrator Responsibility.
 - b. Navigate to **Profile > System**.
 - c. Locate the profile:
AMS: Cut off percentage for Approvals.
 - d. Update the default value to 50 or 100% (depending on the business process.)

You have now completed the creation of the default role. For any other specific changes to approval rules, access the Approval Rules screen under the Administration > **Setup** tabs.

Only users with Super User privileges can access the Approval Rules screen. For any custom menu created, use the function AMS_APPROVALS_VIEW.

Mapping Your Customer Model to Oracle Marketing Online

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

Setting Up Data Fields for Lists

Use this procedure to determine which AMS_LIST_ENTRIES and AMS_IMPORT_SOURCE_LINES table columns are available for list generation. Both tables contain 256 user definable columns. By default, all columns are available.

Prerequisites

None

Steps

1. Navigate to **Administration > 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

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

Prerequisites

None

Steps

1. Navigate to **Administration > 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, Target or Import.
 - 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.

Setting Oracle Marketing Online System Profile Options

You can set the following system profile options:

Oracle Marketing Online System Profile Options

| PROFILE NAME | PROFILE DESCRIPTION |
|---------------------------------------|---|
| AMS: Admin Group | Defines Super Admin Group with super admin privileges. Members of this group can edit Marketing objects belonging to any user. |
| 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 |
| 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_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: Cut off percentage for Approvals | Defines the cutoff percentage before an object is allowed to go active |
| AMS: DATE FORMAT | Defines Date format |
| AMS_DEFAULT_CURR_CODE | Determines the currency used for price list creation. Can be set at: Site |

Oracle Marketing Online System Profile Options

| PROFILE NAME | PROFILE DESCRIPTION |
|-------------------------------|--|
| 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 |
| 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. Set the path to be the same as the AMS_IMP_DATA_PATH to simplify your list import process. 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: Marketing Calendar | Selects calendar to be displayed for periods |

Oracle Marketing Online System Profile Options

| PROFILE NAME | PROFILE DESCRIPTION |
|--|---|
| 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 Numeric Format | Defines numeric format |
| AMS_PRICELIST_HEADER_NAME | All Events pricing will align under this price list header. Can be set at: Site |
| AMS_PROFILE_SEARCH_SET_SIZE | For Future Use |
| AMS_QP_PRICING_CALLOUT | AMS: Should Call to Pricing Mo Can be set at: Site |
| AMS: Should Call to Inventory Modules be Made? | If a delv is created and updated as inventoried item, it will be created in Oracle Inventory Scehma only if this profile is set to Y. |
| AMS: Should Call to Pricing Modules be Made? | If a delv is created and updated as an inventoried item, it will also create a price list header and price list line for this delv if the profile is set to Y. If a price list header already exists, it will only create aprice list line for the deliv. |
| 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 |

Oracle Marketing Online System Profile Options

| PROFILE NAME | PROFILE DESCRIPTION |
|----------------------------|---|
| 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: Uom Area | Devines lovs for area. Used in Venues. |
| AMS: Uom Length | Devines lovs for length. Used in Venues. |
| AMS: Uom Quantity | Defines lovs for quantity. Used in Venues. |
| AMS: Uom Time | Devines lovs for time. Used in Events. |
| 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 Trade Management Marketing Can be set at: Site |
| OZF_ARCM_BATCH_SOURCE | OZF: Credit Memo Batch Source for Trade Management Marketing Can be set at: Site |
| OZF_ARDM_BATCH_SOURCE | OZF: Debit Memo Batch Source for Trade Management Marketing Can be set at: Site |

Implementing Oracle Web Discoverer

Use this procedure to install and implement Oracle Web 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*.
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*.
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*. 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: | <code>http://ap152wgs.us.oracle.com/webdis/html/english/welcome.htm?Connect=[APPS_SECURE]</code> |

| | |
|--------------|---|
| 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

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: | <code>-d <db connect string> <user or schema> <password></code> |
| Example(s): | <code>-d jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps</code> |
| Required: | Yes |
| Default | N/A |
| <hr/> | |
| Purpose: | Specify the content provider code. |
| Syntax: | <code>-v <vendor code 1>[, vendor code 2,...]</code> |

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. Only necessary for an organization behind a fire wall. |
| Default: | None |
| Purpose: | Start the NewsDaemon in User Update mode. If this argument is not specified, the NewsDaemon starts 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 Web Discoverer

- Current release does 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 another version of Oracle Web Discoverer before, then your browser cache may have the latest version of Discoverer objects. If you access a lower version of Oracle Web Discoverer, then you will get the wide area network connection error in Internet Explorer.

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 | amscamp.wft |
| | Marketing Approvals | amsvappr.wft |
| OZF | Fund Request Approvals | ozfvwreq.wft |

Administering Oracle Marketing Online

This group of topics explains how to administer different functions of Oracle Marketing Online. Depending on your implementation, these procedures may be restricted to applications administrators only.

Enabling Campaign and Event Approval Workflow

Use this procedure to enable the Workflow approval process for campaign themes and budgets. You must enable the Workflow for each campaign and event setup separately.

Prerequisites

You must create campaign setups first.

Steps

1. Navigate to **Administration > Setup > Custom Setup**.
2. Click on the name of the setup you wish to enable.
The Custom Setup subtab appears.
3. If you wish to enable campaign theme approval using the default Oracle Marketing Online Workflow, then select the **Show** check box for Theme Approval. This is one of the last items on the list.
4. If you wish to enable campaign budget approval using the default Oracle Marketing Online Workflow, then select the **Show** check box for Budget Approval. This is one of the last items on the list.
5. Click **Update**.

Setting Up Marketing Mediums for Campaigns

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 **Administration > 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

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". You associate the Print Advertising activity with two marketing mediums: The Wall Street Journal and the Washington Post. You associate the Television Advertising activity with the television marketing medium.

Prerequisites

You must [set up marketing mediums](#) before you can complete this procedure.

Steps

1. Navigate to **Administration > Setup > 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

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

- Which item on the side panel menus 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 checklist

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

Prerequisites

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

- [Marketing mediums](#)
- [Activities](#)

Steps

1. Navigate to **Administration > Setup > Custom Setup**.

2. **Click Create.**

The Create Custom Setup subtab appears.

3. In Setup Name, enter a name for this custom setup. This is the name that appears in the Setup Type drop-down list during campaign and event creation and above the list of item on the side panel menus.
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 custom setup further, then select an activity for the activity type. If you do not select an activity type, then this custom setup 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 checklist for the campaign or event using this custom setup.
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 item on the side panel menu 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 checklist 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 | <p>Enter a suffix for the source code that is generated automatically whenever an agent creates a campaign.</p> <p>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 generated by the system automatically.</p> |
| Marketing Medium Name | LOV of Marketing Mediums you have set up previously. |

Creating Metrics

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 **Administration > General > Metric**.
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 uses 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**.

Creating Venues

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 **Administration > 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.

Help for This Feature Under Development

There is no help available on this feature at this time.

About Workbooks, Worksheets, and Oracle Web Discoverer

Oracle Marketing Online includes Oracle Web Discoverer, a separate application which non-technical users can use to create database queries for list creation.

This topic explains a few key terms:

- [Folders, field icons, and the End User Layer \(EUL\)](#)
- [Worksheets](#)
- [Workbooks](#)
- [Conditions](#)

Folders, Field Icons, and the End User Layer (EUL)

Oracle Web Discoverer's graphical user interface represents query terms as folders and field icons. Users move these from left to right to create a query. See *Using Web Discoverer* for more information.

The folders represent different views of the database. The Contacts OK to email folder, for example, lists all of the customers in the database who have indicated that they can be emailed.

The fields represent customer attributes, including name, telephone number, age, and so on.

Oracle Marketing Online application development team has created folders and fields in Oracle Web Discoverer that are specific to marketing. Together this is called the End-User Layer.

Worksheets

The query you create by moving the folders and fields to the right side of the window is called a worksheet. It is these individual worksheets that you use in the list creation process.

Workbooks

When you save the query, Discoverer automatically creates a workbook for the worksheet. In this respect, Discoverer is analogous to Microsoft Excel where each sheet is stored in a book.

If you wish, you can store multiple worksheets in a workbook. But for the purposes of Oracle Marketing Online you are better off having just one worksheet per workbook.

This is because you select individual worksheets and not workbooks for list creation.

Oracle Marketing Online does not distinguish between worksheets and workbooks. Both are called by the generic term workbook and both appear in the list of values when you add workbooks during list creation.

Conditions

You can apply a condition to the worksheet to further constrain the query. For example, if you wish to create a worksheet that retrieves only the contact and email records for one organization, the Global Enterprise organization, then the condition you will use is `Organization Name = "Global Enterprise"`.

See Also

[Creating Workbooks in Discoverer](#)

Available Mailmerge Fields

The following fields are available for use in cover letters depending on which of the two seeded queries you select:

Marketing Simple Query:

- title
- first_name
- last_name
- pin_code

Marketing Detailed Query:

- title
- first_name
- last_name
- pin_code
- inbound_dscript_name
- inbound_url
- inbound_email_id
- inbound_phone_no
- source_code
- offer_code

References

- For information on how to create a mailmerge letter using these fields, see [Creating a Mailmerge Letter](#)

