Oracle® Interaction Blending

Implementation Guide

Release 11*i*

July 2001

Part No. A87491_03

ORACLE®

Oracle Interaction Blending Implementation Guide, Release 11*i*

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Contents

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Preface

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

This Implementation Guide provides general descriptions of the setup and configuration tasks required to implement Oracle Interaction Blending successfully.

This preface explains how this Implementation Guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Anyone implementing Oracle Interaction Blending

This guide assumes you have the following prerequisites:

- Understanding of the company business processes
- Basic understanding of Oracle Applications, Release 11i
- Understanding of interaction center technology

Structure

This manual contains the following sections:

- Section 1.1, "Overview of Oracle Interaction Center"
- Section 1.2, "Planning the Implementation of Oracle Interaction Blending"
- Section 1.3, "Understanding Oracle Applications User Accounts"
- Section 1.4, "Defining an Oracle Interaction Blending Administrator"
- Section 1.5, "Configuring Oracle Interaction Blending"
- Section 1.6, "Setting Up an Interaction Center"
- Section 1.7, "Understanding Media Classifications"
- Section 1.8, "Integrating Oracle Interaction Blending with Oracle Universal Work Queue"
- Section 1.9, "Integrating Oracle Interaction Blending with Oracle Telephony Manager"
- Section 1.10, "Documentation Resources"

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Implementing Oracle Interaction Blending

This guide provides descriptions of the setup and configuration tasks required to implement Oracle Universal Work Queue successfully. This guide contains the following information:

- Overview of Oracle Interaction Center
- Planning the Implementation of Oracle Interaction Blending
- Understanding Oracle Applications User Accounts
- Defining an Oracle Interaction Blending Administrator
- Configuring Oracle Interaction Blending
- Setting Up an Interaction Center
- Understanding Media Classifications
- Integrating Oracle Interaction Blending with Oracle Universal Work Queue
- Integrating Oracle Interaction Blending with Oracle Telephony Manager
- Documentation Resources

1.1 Overview of Oracle Interaction Center

Every customer interaction -- a telephone call, an email, or a Web chat -- presents an opportunity to win new business or improve customer satisfaction. An interaction center is an environment in which human agents manage interactions with customers through multiple contact channels.

Oracle Interaction Blending is one of several applications in the Oracle Interaction Center. The Oracle Interaction Center is a suite of applications that supports the

management and processing of customer relationship activity across all channels of customer contact.

The Oracle Interaction Center suite includes:

Oracle Advanced Inbound Oracle Advanced Inbound enables Oracle Customer Relationship Management (CRM) business applications to handle multiple media channels.

Oracle Advanced Outbound Oracle Advanced Outbound provides list management and predictive dialing for outbound telephony campaigns.

Oracle eMail Center Oracle eMail Center is an email interaction management application. Oracle eMail Center can automate or suggest responses to inbound email.

Oracle Scripting Oracle Scripting is an application for developing and deploying scripted presentations for customer interactions. The scripted presentations guide agents through their interactions with customers.

See Also

- What is Oracle Interaction Blending?
- Integration Dependencies for Oracle Interaction Blending
- Sizing Guidelines for Oracle Interaction Blending
- Scalability for Oracle Interaction Blending

1.1.1 What is Oracle Interaction Blending?

Oracle Interaction Blending provides the ability to "blend" voice calls, e-mails, etc. between inbound and outbound agents. For instance as inbound call volumes decrease, agents can dynamically move to handle incoming e-mail or outbound phone calls. This significantly increases agent productivity and improves customer service. Oracle Interaction Blending assigns agents to handle inbound and outbound media depending on call volume and service levels.

See Also

- Overview of Oracle Interaction Center
- Integration Dependencies for Oracle Interaction Blending

- Sizing Guidelines for Oracle Interaction Blending
- Scalability for Oracle Interaction Blending

1.1.2 Integration Dependencies for Oracle Interaction Blending

Oracle Interaction Blending has a number of integration points with other Oracle products.

1.1.2.1 Installation Dependencies

Oracle Interaction Blending has references to the common and shared components of the following products.

- Oracle Applications Foundation (FND)
- CRM Foundation (JTF)
- Common CRM Interaction Center Technology Schema (IEO)
- Oracle Universal Work Queue
- Oracle Telephony Manager -- Routing Server

See Also

- Overview of Oracle Interaction Center
- What is Oracle Interaction Blending?
- Sizing Guidelines for Oracle Interaction Blending
- Scalability for Oracle Interaction Blending

1.1.3 Sizing Guidelines for Oracle Interaction Blending

Oracle Interaction Blending complies with the general sizing recommendations for the Oracle database and Oracle Applications used in your business operations.

See Also

- Overview of Oracle Interaction Center
- What is Oracle Interaction Blending?
- Integration Dependencies for Oracle Interaction Blending
- Scalability for Oracle Interaction Blending

1.1.4 Scalability for Oracle Interaction Blending

Oracle Interaction Blending complies with the general scalability recommendations for the Oracle database and Oracle Applications used in your business operations.

See Also

- Overview of Oracle Interaction Center
- What is Oracle Interaction Blending?
- Integration Dependencies for Oracle Interaction Blending
- Sizing Guidelines for Oracle Interaction Blending

1.2 Planning the Implementation of Oracle Interaction Blending

Plan your implementation to ensure that you understand the scope of the implementation project.

See Also

- Overview of Implementing Oracle Interaction Blending
- Implementation Starting Point

1.2.1 Overview of Implementing Oracle Interaction Blending

The following list is a high-level overview of the steps for implementing Oracle Interaction Blending.

1. Define an Oracle Interaction Blending administrator.

   See Defining an Oracle Interaction Blending Administrator.

2. Configure Oracle Interaction Blending.

   See Configuring Oracle Interaction Blending.

See Also

- Implementation Starting Point

1.2.2 Implementation Starting Point

This implementation guide assumes that you have, at a minimum:

- Installed Oracle Applications (database, technology stack, and Oracle Applications files).

  See *Installing Oracle Applications* or *Upgrading Oracle Applications*.

- If implementing Oracle eMail Center, installed Microsoft Internet Explorer on the agent desktop -- otherwise, installed Netscape Communicator.
- Installed JInitiator on the agent desktop.
- Optionally, implemented Oracle Human Resource Management Systems.

  See *Implementing Oracle HRMS*.

- Implemented CRM Foundation Resource Manager.

  See *Oracle CRM Foundation Implementation Guide*.

- Implemented one of Oracle TeleSales or Oracle Support.

  See *Oracle TeleSales Implementation Guide* or *Oracle Support Implementation Guide*.

- Installed and configured the media layer -- telephony or email.

  See *Oracle Call Center Connectors Implementation Guide* or the Oracle Email Server documentation.

- Installed and configured the appropriate interaction servers.

  See *Oracle Call Center Applications Setup Guide*.

- Implemented Oracle Universal Work Queue.

  See *Oracle Universal Work Queue Implementation Guide*.

See Also

- Overview of Implementing Oracle Interaction Blending

1.3 Understanding Oracle Applications User Accounts

Every application user must be an authorized user of Oracle Applications. An application user is uniquely identified by a username and password. Once defined, an application user can sign on to Oracle Applications and access data through Oracle Applications user interfaces.

An application user is granted one or more responsibilities. A responsibility is a level of authority in Oracle Applications that allows a user to access to specific Oracle Applications functions.

For detailed information about Oracle Applications user accounts, see *Oracle Applications System Administrator's Guide*.

1.3.1 Username Guidelines

An application user enters a username to sign on to Oracle Applications. It is helpful to define meaningful usernames, such as the first initial and last name of an employee, or, for a group account, the name of the group.

Use the following guidelines to define Oracle Applications usernames:

- The username must not contain more than one word.
- You should use only alphanumeric characters ('A' through 'Z', and '0' through '9') in the username.

Please note that you must limit your username to the set of characters that your operating system supports for filenames.

1.3.2 Password Guidelines

An application user enters a password along with her or his username to sign on to Oracle Applications. Use the following guidelines to define Oracle Applications passwords:

- A password must be at least five characters and can extend up to 100 characters.
- You should use alphanumeric characters ('A' through 'Z', and '0' through '9') in a password. All other characters are invalid.

The application user password assigned by the system administrator is temporary. Upon signing on for the first time, the application user will be prompted to change the password.

1.3.3 Responsibilities Guidelines

All Oracle Applications products are installed with predefined responsibilities. Additionally, instances of the major components that help define a responsibility (data groups, request security groups, menus, and functions) are predefined for Oracle Applications. A system administrator can assign users any of the standard responsibilities provided with Oracle Applications, or create new custom responsibilities.

The responsibility key is a unique name for a responsibility. After the responsibility records has been saved, the responsibility key cannot be updated. However, the

responsibility name can be changed at any time. If a user has more than one responsibility, then the responsibility name appears in the Responsibilities window after a user signs on.

See Also

- Defining an Oracle Interaction Blending Administrator

1.4 Defining an Oracle Interaction Blending Administrator

Use this procedure to create an Oracle Interaction Blending administrator.

The Oracle Interaction Blending administrator define a blending server, creates service plans, and creates service categories.

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.
- Review Understanding Oracle Applications User Accounts.
- Obtain an Oracle Applications user account with access to the System Administrator (SYSTEM_ADMINISTRATOR) responsibility.

Steps

1. **If necessary, sign on to Oracle Applications.**

   If you are signing on to Oracle Applications with this username for the first time, the message "Your password has expired" appears. Use the Password Update window to enter a new password.

2. **Switch to or select the System Administrator responsibility.**

   - To switch to a different responsibility, choose **Switch Responsibility, from the File menu.**

3. **In the Navigator window, on the Functions tab, choose Security > User > Define.**

   The User window appears.

4. In the User Name field, enter the name of the user account.

5. **In the Password field, enter the password for the user account and then press Tab.**

   The cursor remains in the Password field.

6. **Enter the password again to verify it.**

Note: This is a temporary password. When the user signs on to Oracle Applications for the first time, the message "Your password has expired" appears. The user can use the Password Update window to enter a new password.

7. In the Responsibilities tab, add the following responsibilities:

Function	Responsibility Name	Responsibility Key
Define blending servers	IEB_ADMINISTRATOR	IEB_ADMINISTRATOR
Create service plans		
Create service categories		
Create an employee in CRM Resource Manager (if Oracle HRMS is not installed)	CRM Administrator	JTF_ADMINISTRATOR
Create an CRM resource		
Set up Oracle Interaction Blending server for media work		
Configure the Oracle Interaction Blending desktop for media work		

Once the user record has been saved, you cannot delete an assigned responsibility. Oracle Applications maintains audit data for assigned responsibilities.

To deactivate an assigned responsibility, set the effective end date (in the Effective Dates - To field) of the assigned responsibility to the current date. To activate an assigned responsibility, clear or reset the effective end date.

8. From the **File** menu, choose **Save**.

See Also

- Understanding Oracle Applications User Accounts

1.5 Configuring Oracle Interaction Blending

Follow the steps in the following table to configure Oracle Interaction Blending. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Responsibility column indicates the Oracle

Applications user account responsibility required to complete the step. The Navigation column provides the path for navigating to the necessary window.

Number	Required?	Description	Responsibility	Navigation
❑ Step 1	Required	**Create an interaction blending server.** See: Creating a Blending Server	IEB_ ADMINISTRATOR	Blending Server tab > Create
❑ Step 2	Required	**Create service plans for inbound and outbound media.** See: Creating a Service Plan	IEB_ ADMINISTRATOR	Service Plan tab > Create
❑ Step 3	Required	**Create service categories for inbound and outbound media.** See: Creating a Service Plan	IEB_ ADMINISTRATOR	Service Category tab > Create

For information about administering Oracle Interaction Blending, such as modifying or deleting a service category, see *Oracle Interaction Blending Concepts and Procedures*.

1.5.1 Creating a Blending Server

Oracle Interaction Blending server receives media tasks and maps them to service categories. Oracle Interaction Blending server then evaluates service category statistics, agent transaction statistics, the levels of service, and the ability of the agents to handle a specific media task. If needed, Oracle Interaction Blending server moves agents among the service categories to maintain the desired levels of service.

Use this procedure to create an interaction blending server.

Prerequisites

- Install the Interaction Blending server. Review *Oracle Call Center Applications Setup Guide*.
- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

1. If necessary, sign on to Oracle eBusiness Center.

If you are signing on to Oracle eBusiness Center with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Blending Server tab.
3. In the Blending Servers page, click **Create**.

   The Create Server page appears.
4. Enter the information for the blending server.
5. Click **Create**.

   The Blending Servers page appears.

See Also

- Creating a Service Plan
- Creating a Service Plan

1.5.2 Creating a Service Plan

A service plan defines a set of service requirements for a service category. Service requirements, or levels of service, are used to measure the responsiveness of the interaction center to the customer.

Service plan are global, are shared among the Oracle Interaction Blending servers, and associated with a service category. Service plans either govern inbound media or outbound media, and, as such, their parameters depend on the media type.

A service plan contains at least seven regular segments, one for each day in the week. You can also set up service objectives for a specific date (a specific segment). If both a regular segment and a specific segment apply to the same day, then the specific segment is used.

Inbound service plans measure the percentage of media tasks to be handled within a time threshold (for example, 80% of the inbound calls to be answered within 60 seconds). Outbound service plans are measured by the number of transactions to be handled within a time period (for example, 200 transaction).

By default, service objectives are set from 00:00 to 23:59 (server local time). However, any segment can be subdivided into multiple time interval (for example, 00:00 to 08:59, 09:00 to 16:59, and 17:00 pm to 23:59), each with different service objectives. The segments will be repeatedly used until they are updated, divided or merged.

Oracle Interaction Blending server tries to map interaction tasks to a service category. If the service category cannot be determined, then the media task is associated with the default service category for the direction (inbound or outbound) and media type. You should set up service plans for both default service categories and custom service categories.

Topics include:

- Creating a Service Plan for Inbound Media
- Creating a Service Plan for Outbound Media

See Also

- Creating a Blending Server
- Creating a Service Plan

1.5.3 Creating a Service Plan for Inbound Media

Use this procedure to create a service plan for inbound media.

Prerequisites

- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

1. Select the Service Plan tab.

   The Service Plans page appears.

2. Click **Create**.

   The General page appears.

3. Enter general information about the service plan and then click **Done**.

   The Inbound Plan Segments page appears.

4. Enter the inbound segments and then click **Done**.

   The Service Plans page appears.

See Also

- Creating a Blending Server

- Creating a Service Plan for Outbound Media
- Creating a Service Plan

1.5.4 Creating a Service Plan for Outbound Media

Use this procedure to create a service plan for outbound media.

Prerequisites

- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

1. Select the Service Plan tab.

   The Service Plans page appears.

2. Click **Create**.

   The General page appears.

3. Enter general information about the service plan and then click **Done**.

   The Outbound Plan Segments page appears.

4. Enter the outbound segments and then click **Done**.

   The Service Plans page appears.

See Also

- Creating a Blending Server
- Creating a Service Plan for Inbound Media
- Creating a Service Plan

1.5.5 Creating a Service Category

The service category is what Oracle Interaction Blending uses to make blending decisions. A service category represents a subset of media tasks with similar characteristics (for example, inbound customer service telephone calls). The composition of service categories reflects a working model of the interaction center.

Service categories are always associated with an Oracle Interaction Blending server. Oracle Interaction Blending server maps media tasks to service categories.

Service categories either govern inbound media or outbound media, and, as such, their parameters depend on their direction. Inbound media tasks are mapped to service categories based on media type and classification. Outbound media tasks are mapped to service categories based on media type and campaign. Service categories group media tasks, collect statistics, and measure levels of service.

Topics include:

- Creating an Inbound Service Category
- Creating an Outbound Service Category

See Also

- Creating a Blending Server
- Creating a Service Plan

1.5.6 Creating an Inbound Service Category

Use this procedure to create an interaction blending service category for inbound media.

Prerequisites

- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.
- Create an interaction blending server. See Creating a Blending Server.
- Create an inbound media classification. See Understanding Media Classifications.
- Create an inbound service plan. See Creating a Service Plan for Inbound Media.

Steps

1. Select the Service Category tab.
2. Click **Create**.

   The Create Service Category page appears.
3. Enter the name of the service category and a brief description.
4. If the service category is active, select **Active**.
5. In the Blending Server field, select the name of the interaction blending server to which the service category will be associated.

6. In the Parent Category field, select **Inbound**.
7. Click **Continue**.

   The Classification page appears
8. Select the classification(s) to be associated with this service category.
9. Click **Continue**.

   The Service Plan page appears
10. In the Service Plan field, select a service plan.

    The details of the selected service plan are displayed.
11. To view the details for another day or date, select a day or date from the Day/Date field.
12. Click **Done**.

    The Service Categories page appears.

Guidelines

In the following example, Blending_Server1 is created.

See Also

- Creating a Blending Server
- Creating a Service Plan
- Creating an Outbound Service Category

1.5.7 Creating an Outbound Service Category

Use this procedure to create an interaction blending service category for outbound media.

Prerequisites

- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.
- Create an interaction blending server. See Creating a Blending Server.
- Create an outbound campaign.

- Create an outbound service plan. See Creating a Service Plan for Outbound Media.

Steps

1. Select the Service Category tab.
2. Click **Create**.

   The Create Service Category page appears.
3. Enter general information about the service category and then click **Continue**.

   The Campaign page appears.
4. Select a campaign and then click **Continue**.

   The Service Plan page appears.
5. Select a service plan and then click **Done**.

   The Service Categories page appears.

See Also

- Creating a Blending Server
- Creating a Service Plan
- Creating an Inbound Service Category

1.6 Setting Up an Interaction Center

Follow the steps in the following table to set up an interaction center. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Oracle Documentation column provides a reference to other relevant documents.

Number	Required?	Description	Oracle Documentation
❑ Step 1	For telephony only	**Install and configure Oracle Call Center Connectors.**	*Oracle Call Center Connectors Implementation Guide*
❑ Step 2	For email only	**Install and configure Oracle Email Server.**	*Oracle Email Server Installation Guide*

Number	Required?	Description	Oracle Documentation
❑ Step 3	For IVR integration only	**Install Oracle IVR Integrator.**	*Oracle IVR Integrator Implementation Guide*
❑ Step 4	Yes	**Define an interaction center server group.** See Defining an Oracle Interaction Center Server Group.	*Oracle Telephony Manager Implementation Guide*
❑ Step 5	Yes	**Define and configure the interaction center servers.** See Defining an Interaction Center Server.	*Oracle Telephony Manager Implementation Guide*
❑ Step 6	Yes	**Define and configure the CTI middleware.** See Defining the CTI Middleware for the Server Group.	*Oracle Telephony Manager Implementation Guide*
❑ Step 7	Optional	**Define the interaction center telesets.**	*Oracle Telephony Manager Implementation Guide*
❑ Step 8	Optional	**Map the inbound IVR data to fields in Oracle Applications.**	*Oracle Telephony Manager Implementation Guide*
❑ Step 9	Yes	**Install the interaction center servers.**	*Oracle Call Center Applications Setup Guide*

1.6.1 Defining an Oracle Interaction Center Server Group

Note: This procedure applies to media work only.

An Oracle interaction center is represented by a logical grouping of interaction center processes called a *server group*. If there are multiple interaction centers or if separate lines of business are operating in the same interaction center, then there can be multiple server groups. Once the server group is defined, you can configure the individual interaction center processes in the group.

Use this procedure to define a server group.

Prerequisites

- Review *Oracle Telephony Manager Implementation Guide*.
- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

6. If necessary, sign on to Oracle Applications.

   If you are signing on to Oracle Applications with this username for the first time, the message "Your password has expired" appears. Use the Password Update window to enter a new password.

7. Switch to or select the CRM Administrator responsibility.

   - To switch to a different responsibility, choose **Switch Responsibility**, from the **File** menu.

8. In the Navigator window, on the Functions tab, choose UWQ Server Locator > UWQ Server Locator.

   The Server Locator window appears. To scroll through the records for all server groups, press Page Up or Page Down. To search for a specific server group, choose **View** > **Query by Example** > **Enter** to invoke the query entry mode. Enter your query and then choose **View** > **Query by Example** > **Run** to find the matching server groups.

9. To define a new server group, choose **New** from the **File** menu.

10. In the Server Group tab, define the server group.

    The server group name is required. The server group location and description are for informational purposes only.

11. From the **File** menu, choose **Save**.

See Also

- Defining an Interaction Center Server
- Defining the CTI Middleware for the Server Group

1.6.2 Defining an Interaction Center Server

Note: This procedure applies to media work only.

Oracle interaction center functions, such as Oracle Interaction Blending, are governed by individual server processes. The number and types of server processes in a server group will depend on how you are implementing your Oracle

interaction center. The server processes may run on one or more server machines. Each server process is configured individually.

The following table lists the recommended servers for different types of media processing.

If you are implementing...	Then define...
Advanced Inbound Telephony in Passive Mode	Server Monitor Telephony Manager Telephony Media Controller Inbound Telephony Server (if implementing web callback) Routing Server (for media classification; routing not used) Universal Work Queue Server
Advanced Inbound Telephony in Active Mode	Server Monitor Telephony Manager Telephony Media Controller Inbound Telephony Server Routing Server (for media classification and routing) Interaction Blending Server (if implementing media work blending) Universal Work Queue Server
Advanced Outbound Telephony	Server Monitor Telephony Manager Telephony Media Controller Inbound Telephony Server Advanced Outbound Proxy Server Routing Server (for media classification and routing) Interaction Blending Server (if implementing media work blending) Universal Work Queue Server

If you are implementing...	Then define...
eMail Center	Server Monitor
	Telephony Manager
	Telephony Media Controller
	eMail Center Server
	Routing Server (for media classification and routing)
	Interaction Blending Server (if implementing media work blending)
	Universal Work Queue Server

Use this procedure to define and configure interaction center servers.

Prerequisites

- Review *Oracle Telephony Manager Implementation Guide*.
- Define an interaction center server group. See Defining an Oracle Interaction Center Server Group.
- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

1. If necessary, sign on to Oracle Applications.

   If you are signing on to Oracle Applications with this username for the first time, the message "Your password has expired" appears. Use the Password Update window to enter a new password.

2. Switch to or select the CRM Administrator responsibility.

   - To switch to a different responsibility, choose **Switch Responsibility**, from the **File** menu.

3. In the Navigator window, on the Functions tab, choose **UWQ Server Locator** > **UWQ Server Locator**.

   The Server Locator window appears.

4. In the Server Group tab, find your server group

   To scroll through the records for all server groups, press Page Up or Page Down. To search for a specific server group, choose View > Query by Example

> Enter to invoke the query entry mode. Enter your query and then choose View > Query by Example > Run to find the matching server groups.

5. Select the Server tab.

   To scroll through the records for all servers in the server group, press Page Up or Page Down. To search for a specific server in the server group, choose **View** > **Query by Example** > **Enter** to invoke the query entry mode. Enter your query and then choose **View** > **Query by Example** > **Run** to find the matching servers.

6. To define a new server, choose **New** from the **File** menu.

7. In the Server Registration area, identify the server.

   The server name and type are required.

   a. Enter a unique name for the server.

      The name of the server in the Server Locator window in the Server tab must match the name given to the server when it is installed on a machine. To change the name of an interaction center server in the database, use the Server tab.

   b. Optionally, in the Server Location field, enter the location of the server.

   c. From the Type Name list, select the server type.

      The Member Group Name field automatically displays the name of the server group selected on the Server tab.

   d. Optionally, to associate the server with another server group, select the server group from the Member Group Name list.

      If the server is on a machine with a static IP address, then the DNS name and IP address are automatically displayed when the server is started for the first time.

   e. If the server is on a machine in a DCHP or multi-homed network configuration, then specify the IP address of the machine in the User Address field.

   f. Optionally, in the Description field, enter a description of the server.

8. In the Server Parameter area, configure the parameters for the server.

   Each row in the Server Parameter area corresponds to a server parameter.

   a. From the Name list, select a parameter.

      The parameters listed in the Name list depend on the type of type of server.

b. Enter a value for the parameter.

Parameters must be defined for Telephony Manager Server, Inbound Telephony Server, Telephony Media Controller, and Oracle Interaction Blending Server.

Use the following table to set the parameters for Inbound Telephony Server.

Parameter	Required?	Description	Example
OTM_SERVER_NAME	Yes	The name of the Telephony Manager Server in the server group.	OTMServer
TELE_MIDDLEWARE_CONFIG	Yes	The name of the middleware configuration. The middleware configuration name parameter in the Server Locator window in the Server tab must match the name of the middleware configuration in the Call Center Administration window in the Middleware tab. See Defining the CTI Middleware for the Server Group.	MWConfig
WEB_CALL_PORT	For web callback only	The port used to listen for web callback requests. The default port for web callback requests is 888. The web callback port parameter in the Server Locator window in the Server tab must match the port in the OTM Server Port field in the iSupport Admin UI -> Support tab -> Call Me sub-tab.	888

Use the following table to set the parameters for Telephony Manager Server.

Parameter	Required?	Description	Example
TELE_MIDDLEWARE_CONFIG	Yes	The name of the middleware configuration. The middleware configuration name parameter in the Server Locator window in the Server tab must match the name of the middleware configuration in the Call Center Administration window in the Middleware tab. See Defining the CTI Middleware for the Server Group.	MWConfig
DEFAULT_TIMEOUT	Optional	Default timeout for re-route in minutes. For example, when this parameter is set to 5, a media item will be re-routed if it has been waiting in queue for more than 5 minutes.	5
IB_SERVER_NAME	Optional	The name of the Interaction Blending Server in the server group.	IBServer

Parameter	Required?	Description	Example
MQA_MODE	Optional	This parameter applies to the Nortel switch only. If multiple queue mode is on, select TRUE. If multiple queue mode is off, select FALSE or leave this parameter blank.	TRUE
PASSIVE_MODE	Optional	To configure Telephony Manager Server to run in passive mode, select TRUE. To configure Telephony Manager Server to run in active mode, select FALSE or leave this parameter blank.	FALSE
ROUTE_SERVER_1	For active mode only	The name of the Routing server in the server group. To balance the media work load, Telephony Manager Server can support up to three Routing servers. When multiple Routing servers are present, Telephony Manager Server sends media work to each Routing server on a round-robin basis.	RouteServer1
ROUTE_SERVER_2	Optional	The name of a Routing server in the server group.	RouteServer2
ROUTE_SERVER_3	Optional	The name of a Routing server in the server group.	RouteServer3
STANDALONE	Optional	To configure Telephony Manager Server to run in standalone mode, select STANDALONE. To configure Telephony Manager Server to run in distributed mode, select DISTRIBUTED or leave this parameter blank.	TRUE

Use the following table to set the parameters for Telephony Media Controller.

Parameter	Required	Description	Example
TELE_MIDDLEWARE_CONFIG	Required	The name of the middleware configuration. The middleware configuration name parameter in the Server Locator window in the Server tab must match the name of the middleware configuration in the Call Center Administration window in the Middleware tab. See Defining the CTI Middleware for the Server Group.	MWConfig
OTM_SERVER_NAME	Required	The name of the Telephony Manager Server in the server group.	SampleOTM
MQA_MODE	Optional	This parameter applies to the Nortel switch only. If multiple queue mode is on, select TRUE. If multiple queue mode is off, select FALSE or leave this parameter blank.	TRUE
PASSIVE_MODE	Optional	To configure Telephony Manager Server to run in passive mode, select TRUE. To configure Telephony Manager Server to run in active mode, select FALSE or leave this parameter blank.	FALSE

Use the following table to set the parameters for Oracle Interaction Blending Server.

Field Name	Required	Description	Example
SERVER_PORT	Required	The port used to listen for media requests from the Oracle Interaction Blending desktop bean. The default port is 80. Port 80 is a commonly used port. If when Oracle Universal Work Queue Server is started, there is error message that the port is already in use, you can modify the port number.	80

9. From the **File** menu, choose **Save**.

See Also

- Defining an Oracle Interaction Center Server Group
- Defining the CTI Middleware for the Server Group

1.6.3 Defining the CTI Middleware for the Server Group

Note: This procedure applies to media work only.

CTI (computer telephony integration) middleware enables Oracle Telephony Manager Server and the Inbound Telephony Server to control telephony devices (for example, agent phones and telesets) and shared telephony resources (for example, phone switches).

Use this procedure to define the CTI middleware for the interaction center.

Prerequisites

- Review *Oracle Telephony Manager Implementation Guide*.
- Define an interaction center server group. See Defining an Oracle Interaction Center Server Group.
- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

1. If necessary, sign on to Oracle Applications.

If you are signing on to Oracle Applications with this username for the first time, the message "Your password has expired" appears. Use the Password Update window to enter a new password.

2. Switch to or select the CRM Administrator responsibility.
   - To switch to a different responsibility, choose **Switch Responsibility, from the File menu.**
3. In the Navigator window, on the Functions tab, choose **Call Centers** > **Call Center Administration**.

   The Call Center Administration window appears.
4. Find your server group

   To scroll through the records for all server groups, press Page Up or Page Down. To search for a specific server group, choose **View** > **Query by Example** > **Enter** to invoke the query entry mode. Enter your query and then choose **View** > **Query by Example** > **Run** to find the matching server groups.
5. Select the Middleware tab.
6. In the Middleware Configuration area, specify your middleware.
   a. In the Configuration Name field, enter a unique name for the middleware configuration.

      The name of the middleware configuration in the Middleware tab must match middleware configuration name parameter for the Inbound Telephony Server, Telephony Manager Server, and Telephony Media Controller. See Defining an Interaction Center Server.

   b. From the Middleware Type list, select the middleware type.

      Use the following table to determine the appropriate middleware type.

If the middleware is...	And the CTI enabler is...	And the switch is one of...	Then select middleware type...
Oracle Call Center Connectors	Dialogic CT-Connect	Alcatel 4400	Dialogic CT-Connect
		Avaya (Lucent) Definity G3	
		Nortel Meridian	
		Nortel Symposium Call Center Server	
		Siemens HICOM (US and international)	
Oracle Call Center Connectors	Cisco ICM	Aspect	Cisco ICM/Enterprise CTI
		Avaya (Lucent) Definity G3	
		Nortel Meridian	

c. In the IP Address field, enter the IP address of the middleware server.

The middleware server is the machine that is hosting the CTI middleware, such as Oracle Call Center Connectors.

d. In the Port field, enter the port number of the middleware server.

For Oracle Call Center Connectors, the default port number is 3201. Verify the port number against the actual configuration of the middleware server.

7. In the Middleware Parameters area, configure the parameters for the selected middleware type.

Each row in the Middleware Parameters area corresponds to an Oracle interaction center server parameter.

a. From the Name list, select a parameter.

The parameters listed in the Name list depend on the type of middleware selected from the Middleware Type list.

b. Enter a value for the parameter.

If you are using Dialogic CT-Connect as the CTI enabler, use the following table to set the middleware parameters.

Parameter	Required	Description	Example
CTI Enabler IP Address	Yes	The IP address of the CT-Connect server.	123.45.67.890
PBX Name	Yes	The link logical identifier defined in the CT-Connect configuration to represent the CTI link between CT-Connect and the switch.	ctc_nortel ctc_lucent

Parameter	Required	Description	Example
PBX Type	Yes	The PBX type. ■ For Lucent Definity, enter A. ■ For Nortel Meridian or Symposium Call Center Server, enter M. ■ For Siemens HICOM, enter S ■ For Alcatel 4400, enter C	A
Middleware Server Info 1	Yes	Enter the value `ncacn_ip_tcp` as the identifier for the network protocol used between Oracle Call Center Connectors and CT-Connect.	Enter `ncacn_ip_tcp` for TCP/IP (actual value)

Route Points Set 1
Route Points Set 2
Route Points Set 3
Route Points Set 4
Route Points Set 5
	If using active mode	Devices within the PBX/ACD where inbound calls are initially received and route requests are issued.
		■ Lucent Definity
		Enter one or more vector directory numbers (VDN), separated by commas. The format is:
		`vdn[,vdn...]`
		■ Nortel Meridian:
		Enter one or more CDN-immediate treatment pair(s), separated by commas. (CDN stands for Control Directory Number; the immediate treatment of an inbound call arriving at a CDN can be ringback or music). The format is:
		`cdn:treatment[,cdn:treatment...]`
		The format for `treatment` is:
		`##{R|M#musicRouteNumber}`
		■ Siemens HiCom and Alcatel 4400:
		Enter one or more pilot number(s), separated by commas. The format is:
		`pilotNumber[,pilotNumber...]`
		There is a 256 maximum character limit. You can configure as many route points in each Route Points Set X field as the 256-character limit permits.
			7400
			7400,7500
			7520:##R
			7530:##M#02
			7400

Outgoing Prefix	If using web callback	Numeric prefix dialed to place outside calls. Check against the configuration of the PBX.	9
International Dialing Prefix	If using web callback	Numeric prefix dialed for placing international calls.	011 (from within the USA)
Site Country Code	If using web callback	The country code for the site where the PBX is located.	1
Site Area Code	If using web callback	The area code for the site where the PBX is located.	650

Parameter	Required	Description	Example
IVR Server Name	If using IVR Integrator	The PC-DCE name of the IVR Integrator server. Check against PC-DCE configuration.	SAMPLEIVR (IVR server values must be in uppercase)

If you are using Cisco ICM (formerly Geotel) as the CTI enabler, use the following table to set the middleware parameters.

Parameter	Required	Description	Example
CTI Enabler IP Address	Yes	IP address of the Cisco ICM CTI server (Server A).	123.45.67.890
Middleware Server Info 1	Yes	Port number of the Cisco ICM CTI server (Port A).	42027
Middleware Server Info 2	Yes	IP address of the Cisco ICM CTI server (Server B).	123.45.67.890
Middleware Server Info 3	Yes	Port number of the Cisco ICM CTI server (Port B).	42027
PBX Name	Yes	Peripheral ID defined in Cisco ICM CTI server for the PBX of interest.	5008
PBX Type	Yes	PBX type. ■ A - Lucent Definity ■ M - Nortel Meridian ■ P - Aspect	A
Outgoing Prefix	If using web callback	Numeric prefix dialed to place an outside call. Check against the configuration of the PBX.	9
International Dialing Prefix	If using web callback	Numeric prefix dialed for placing international calls.	011
Site Country Code	If using web callback	The country code for the site where the PBX is located.	1
Site Area Code	If using web callback	The area code for the site where the PBX is located.	650

8. From the **File** menu, choose **Save**.

See Also

- Defining an Oracle Interaction Center Server Group
- Defining an Interaction Center Server

1.7 Understanding Media Classifications

A media classification is a label (for example, GoldSupport) that is assigned to an inbound media item. Classification rules define the conditions under which the classification is assigned. When the media item meets all of the conditions of the classification rules, then the classification is assigned to the media item.

There are two types of classifications: literal and database procedure.

- A literal classification is a string (for example, GoldSupport). The classification rules for a literal classification use only predefined classification keys (for example, ANI = 18881234000). The literal classification is the classification value that is assigned to the media item (for example, Classification = GoldSupport).
- A database procedure classification is a stored procedure. A database procedure classification can use predefined classification keys and additional parameters to determine the classification. The classification value derived by the database procedure is assigned to the media item.

The media classification engine, a component of the Routing server, is used to classify inbound media -- whether Oracle Telephony Manager is operating in active routing mode or passive routing mode. In active routing mode, Oracle Telephony Manager routes inbound media by means of the Routing server. In passive mode routing mode, the ACD/PBX system completely handles the routing and queueing of inbound media.

Media classifications are used in Oracle Interaction Blending to determine which CRM business application to launch when a media item is delivered to the Oracle Interaction Blending desktop. Media classifications are also used by Oracle Interaction Blending to map inbound media to service categories. Finally, in active routing mode, media classifications are used by the Routing server to determine when to reroute a media item.

See Also

- Defining a Literal Classification
- Defining a Database Procedure Classification

1.7.1 Defining a Literal Classification

Note: This procedure applies to media work only.

Use this procedure to define a literal media classification.

Prerequisites

- Install a Routing server. Review *Oracle Call Center Applications Setup Guide*.
- Define a Routing server in the interaction center server group. Review *Oracle Telephony Manager Implementation Guide*.
- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

1. If necessary, sign on to Oracle Applications.

   If you are signing on to Oracle Applications with this username for the first time, the message "Your password has expired" appears. Use the Password Update window to enter a new password.

2. Switch to or select the CRM Administrator responsibility.

   - To switch to a different responsibility, choose **Switch Responsibility**, from the **File** menu.

3. In the Navigator window, on the Functions tab, choose **Call Centers** > **Classification Administration**.

   The Call Center Administration window appears. To scroll through the records for all classification definitions, press Page Up or Page Down. To search for a specific server group, choose **View** > **Query by Example** > **Enter** to invoke the query entry mode. Enter your query and then choose **View** > **Query by Example** > **Run** to find the matching server groups.

4. If necessary, choose **File** > **New**.

5. In the Classification Definition area, define the classification.

   a. Enter a unique name to describe the classification.

   b. From the Type list, select **Literal**.

   c. In the Time Out field, type the number of minutes you want to use as your time out period.

      For advanced inbound telephony in active mode, the time out period is the maximum length of time that a routed call waits in the Oracle Telephony Manager queue for an available agent before being re-routed.

For advanced inbound telephony in passive mode or for email, the Time Out field is not used. Nonetheless, the Time Out field is required. In this case, Oracle recommends that you enter 1000 in this field.

d. If this classification uses the Oracle Applications database, select **Application Database**.

e. If this classification does not use the Oracle Applications database, then select **Non-Application Database**, and enter the database driver and URL.

6. On the Classification Rules tab, define the rules for classifications.

   a. From the Key list, select a key.

      The classification keys provide many types of data that are typically used in an interaction center. These values might come directly from the ACD, an IVR, or even from a Web callback form.

   b. From the Operation list, select an operator.

   c. Enter the value for the selected key.

7. From the **File** menu, choose **Save**.

See Also

- Understanding Media Classifications
- Defining a Database Procedure Classification

1.7.2 Defining a Database Procedure Classification

Note: This procedure applies to media work only.

Use this procedure to define a database procedure classification.

Prerequisites

- Install a Routing server. Review *Oracle Call Center Applications Setup Guide*.
- Define a Routing server in the interaction center server group. Review *Oracle Telephony Manager Implementation Guide*.
- Define an Oracle Interaction Blending administrator. See Defining an Oracle Interaction Blending Administrator.

Steps

1. Navigate to the Classification Administration window.
2. In the Navigator window, on the Functions tab, choose **Call Centers** > **Classification Administration**.

   The Classification Administration window appears.
3. In the Classification Definition area, define the classification.
   a. Enter the name of the database procedure that will determine the classification of the media item, for example, GET_CLASSIFICATION_FROM_SUBJECT.

   Note: The value entered in the Classification field is not verified against the stored procedures. Be sure to enter the correct procedure name.

   b. From the Type list, select **Database Procedure**.
   c. In the Time Out field, type the number of minutes you want to use as your time out period.

      For advanced inbound telephony in active mode, the time out period is the maximum length of time that a routed call waits in the Oracle Telephony Manager queue for an available agent before being re-routed.

      For advanced inbound telephony in passive mode or for email, the Time Out field is not used. Nonetheless, the Time Out field is required. In this case, Oracle recommends that you enter 1000 in this field.
   d. If this procedure is stored in the Oracle Applications database, select **Application Database**.
   e. If this procedure is not stored in the Oracle Applications database, then select **Non-Application** Database, and enter the database driver and URL.
4. On the Classification Rules tab, define the rules for classification.
   a. From the Key list, select a key.

      The classification keys provide many types of data that are typically used in an interaction center. These values might come directly from the ACD, an IVR, or even from a Web callback form.
   b. From the Operation list, select an operator.

c. Enter the value for the selected key.

5. In the Classification Parameters tab, define the parameters for the database procedure:

   a. In the Parameter field, enter the name of a parameter for the database procedure.

   b. In the Value list, select a value or enter a custom value for the parameter.

   c. From the Data Type list, select the data type of the parameters (for example, VARCHAR).

   d. From the Direction List, select the direction of the parameter (for example, IN).

      The sequence is a generated number that indicates the sequence of the parameter.

6. From the **File** menu, choose **Save**.

See Also

- Understanding Media Classifications
- Defining a Literal Classification

1.8 Integrating Oracle Interaction Blending with Oracle Universal Work Queue

To enable media work blending for Oracle Interaction Blending, set the Blending Style profile option to Forced Blended. When media work blending is enabled for Oracle Interaction Blending, the Media node is replaced with a Blended node.

Oracle Interaction Blending must be installed and configured. Oracle Interaction Blending dynamically moves agents between queues and media types based on the service levels for the interaction center. For information about implementing Oracle Interaction Blending, see *Oracle Interaction Blending Implementation Guide.*

1.9 Integrating Oracle Interaction Blending with Oracle Telephony Manager

Oracle Telephony Manager must be in active mode to implement blending. To enable active mode for Oracle Telephony Manager, set the value of the PASSIVE_MODE parameter for the Oracle Telephony Manager server to FALSE

In addition, you must set the IB_SERVER_NAME parameter for the Oracle Telephony Manager server to the name of the Oracle Interaction Blending server in the server group.

1.10 Documentation Resources

The following related documentation is available on MetaLink.

Read the following documents to understand Oracle Applications:

- Oracle Applications Concepts
- Oracle Applications Product Update Notes

Read the following documents to install, upgrade, or maintain Oracle Applications Release 11i:

- Installing Oracle Applications
- Upgrading Oracle Applications
- Upgrading Timing Spreadsheet
- Maintaining Oracle Applications

Read the following documents to implement and use Oracle Human Resource Management Systems:

- Implementing Oracle HRMS
- Managing People Using Oracle HRMS

Read the following document to implement Oracle CRM:

- Implementing Oracle CRM: ERP Functional Checklist
- Implementing Oracle CRM: Foundation Functional Checklist
- Supplemental CRM Installation Steps

Read the following documents to implement the CRM business applications that integrate with Oracle Interaction Blending:

- Oracle CRM Foundation Implementation Guide
- Oracle Support Implementation Guide
- Oracle TeleSales Implementation Guide

Read the following documents to use or administer the CRM business applications that integrate with Oracle Interaction Blending:

- Oracle CRM Foundation Concepts and Procedures
- Oracle Support Concepts and Procedures
- Oracle TeleSales Concepts and Procedures

Read the following documents to install the Oracle Interaction Center server processes:

- Installing Oracle Call Center Connectors
- Oracle Call Center Applications Setup Guide
- Installing Oracle Campaign Plus
- Installing Oracle IVR Integrator
- Installing Oracle Predictive

Read the following documents to implement Oracle interaction Center products:

- Oracle Call Center Connectors Implementation Guide
- Oracle Telephony Manager Implementation Guide
- Oracle IVR Integrator Implementation Guide
- Oracle eMail Center Implementation Guide
- Oracle Campaign Plus and Predictive Implementation Guide
- Oracle Universal Work Queue Implementation Guide
- Oracle Scripting Implementation Guide

Read the following documents to use or administer Oracle interaction Center products:

- Oracle Call Center Connectors Concepts and Procedures
- Oracle Telephony Manager Concepts and Procedures
- Oracle IVR Integrator Concepts and Procedures
- Oracle eMail Center Concepts and Procedures
- Oracle Campaign Plus Concepts and Procedures
- Oracle Predictive Concepts and Procedures
- Oracle Universal Work Queue Concepts and Procedures
- Oracle Scripting Concepts and Procedures