

# Oracle® Campaign Plus and Predictive

Implementation Guide

Release 11*i*

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**Oracle Campaign Plus and Predictive Implementation Guide, Release 11*i***

**Part No. A87494-05**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Herndon, VA 20170  
USA

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# Preface

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

This implementation guide provides information and instructions to help you effectively implement Oracle Campaign Plus and Oracle Predictive.

This preface explains how the 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 Campaign Plus and Oracle Predictive

This guide assumes you have the following prerequisites:

- Understanding of the company business processes
- Knowledge of products and services as defined by your marketing policies
- Basic understanding of Oracle

## Structure

This guide contains the following sections:

- [Section 1.1, "Scope of This Document"](#)
- [Section 1.2, "Abbreviations Used in This Document"](#)
- [Section 1.3, "Overview of the Oracle Interaction Center Products"](#)

- [Section 1.4, "Architecture of Oracle Advanced Outbound"](#)
- [Section 1.5, "Implementing Oracle Advanced Outbound"](#)
- [Section 1.6, "The Implementation Process"](#)
- [Section 1.7, "Glossary"](#)
- [Section 1.8, "Documentation and Other Resources"](#)
- [Appendix A, "Oracle Campaign Plus Calendar Files"](#)
- [Appendix B, "Oracle Campaign Plus Recycling"](#)

## Related Documents

For more information, see the following manuals:

- *Oracle Applications, Concepts*
- *Oracle Applications, Implementing CRM Applications*
- *Oracle Call Center Applications Setup*
- *Oracle Campaign Plus Installation Guide*
- *Oracle Predictive Installation Guide*
- *Oracle Telephony Manager Implementation Guide*

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# Implementing Oracle Campaign Plus and Predictive

## 1.1 Scope of This Document

The intent of this document is to provide a stand-alone guide that will enable you to implement Oracle Advanced Outbound, which consists of Oracle Campaign Plus and Oracle Predictive. It provides an overview of the Oracle Interaction Center; Advanced Outbound architecture, business flow, transaction flow, and implementation process diagrams; an implementation planning questionnaire; and high-level implementation steps with links to topics containing detailed information on each step. The information in this document picks up where the Oracle Campaign Plus and Oracle Predictive Installation Guides end and provides steps to get Advanced Outbound up and running for first time use.

Please refer to the Oracle Campaign Plus and Oracle Predictive Installation Guides for detailed information on installation dependencies, installation steps for Oracle Campaign Plus, Oracle Predictive, and installation steps for Integrated Manager.

Please refer to the Oracle Campaign Plus and Oracle Predictive Concepts and Procedures Guides for detailed information on understanding, using, and administering the product.

## 1.2 Abbreviations Used in This Document

ACD - Automatic Call Distributor

AI - Oracle Advanced Inbound

AO - Oracle Advanced Outbound

AOL - Application Object Library

API - Application Programming Interface  
CCC - Oracle Call Center Connectors  
CRM - Customer Relationship Management  
CTI - Computer Telephony Integration  
IH - Oracle Interaction History  
LCD - Local Call Data file  
OMO - Oracle Marketing Online  
OTM - Oracle Telephony Manager  
SIT - Special Information Tone  
UWQ - Universal Work Queue

## 1.3 Overview of the Oracle Interaction Center Products

Every customer interaction, from a telephone call to an email or a Web chat, presents an opportunity to win new business or improve customer satisfaction. The Oracle Interaction Center supports the management and processing of customer relationship activity across all channels of customer contact.

The Oracle Interaction Center integrates with several customer relationship business applications in the Oracle E-Business suite. The Oracle Interaction Center consists of several modules. The modules relating to inbound telephony and outbound telephony are bundled separately.

The Oracle Interaction Center allows access to centralized customer information and business application functionality. Interaction Center integrates with front office (CRM applications), and back office (ERP applications); thereby enabling a workflow powered, end-to-end strategic e-business solution.

The Oracle Interaction Center products include:

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)

### 1.3.1 Oracle Advanced Inbound

Advanced Inbound provides intelligent routing, advanced queuing, interactive voice response (IVR) integration, and IVR screen pops for inbound media. Oracle Advanced Inbound includes:

- Oracle Call Center Connectors
- Oracle Telephony Manager
- Oracle IVR Integrator
- Oracle Interaction Blending
- Universal Work Queue (media component)

Oracle Call Center Connectors is middleware that enables communications between Oracle Telephony Manager and the telephony switch. The data carried by the CTI enabler path may include the Dialed Number Identification Service (DNIS), Automatic Number Identification (ANI) or customer-keyed information.

Oracle Telephony Manager provides support for inbound calls, manual outbound calls, call routing, and call management. Oracle Telephony Manager integrates with leading switches and IVRs via the CTI middleware.

As an inbound solution, Oracle Telephony Manager manages routing and delivery of calls to the agent desktop. As an outbound solution, Oracle Telephony Manager supports the execution of campaign screen pops to CTI-enabled business applications.

Oracle IVR Integrator captures IVR call information from the time the customer enters an IVR, until the call is transferred to an agent. Oracle IVR Integrator provides the customer data gathered during the IVR portion of the call to the agent's desktop as support for the agent's interaction with the customer.

Oracle Interaction Blending handles the dynamic blending and assigning of agents within an interaction center. Oracle Interaction Blending balances media activity along with service levels, multiple queues and agent skill sets. Through the interactive blending of these components, agents are then dynamically assigned to work environments. Agent skills and skill sets are defined in the Oracle HR application.

While Oracle Interaction Blending is bundled together with Advanced Outbound, its implementation is covered in the *Oracle Interaction Blending Implementation Guide*.

#### See Also

- [Oracle Advanced Outbound](#)

- [Oracle eMail Center](#)
- [Oracle Scripting](#)

### 1.3.2 Oracle Advanced Outbound

Oracle Advanced Outbound includes:

- Oracle Campaign Plus
- Oracle Predictive

Advanced Outbound features list execution, a list manager, and Oracle Predictive dialing. Oracle Campaign Plus executes and manages lists. Oracle Predictive Oracle Predictively dials numbers while screening out non-productive call attempts, such as "busy" signals, non answers, answering machines, modems, faxes, and various SIT tones, thereby helping Interaction Center agents be more productive, while helping management implement revenue-producing outbound campaigns quickly and efficiently.

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**Note:** Oracle Advanced Outbound does not include any other telephony management modules. Oracle Advanced Inbound is required.

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Oracle Advanced Outbound relies on Oracle Marketing Online list generation capability and loads the lists into Oracle Advanced Outbound. Oracle Advanced Outbound requires Oracle Marketing Online be installed for list generation.

Oracle Campaign Plus offers a comprehensive tool to manage and execute strategic outbound telephony campaigns in order to achieve ultimate list penetration.

Oracle Predictive is a highly scalable software-based Oracle Predictive dialer that is driven by Oracle Campaign Plus. It improves Interaction Center profitability by improving campaign results without increasing staff.

Integrated with Oracle Marketing, Advanced Outbound provides the Interaction Center execution channel to realize strategic marketing plans.

#### See Also

- [Oracle Advanced Inbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)

### 1.3.3 Oracle eMail Center

Oracle eMail Center (eMC) is designed to satisfy requirements for inbound customer support, email interaction management, as well as outbound sales and marketing email processing.

Oracle eMail Center helps your business respond to email queries with clear and comprehensive replies in a much more efficient manner. eMail Center automatically generates suggested responses and scores them according to how closely they match the requirements.

#### **See Also**

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle Scripting](#)

### 1.3.4 Oracle Scripting

Oracle Scripting presents scripted messages to guide Interaction Center agents through their interactions with customers. In addition to its easy-to-use thin client agent GUI, it contains a powerful authoring environment of graphical layout tools to create, modify, and deploy scripts.

Oracle Scripting guides agents through interactions with customers by providing scripted text that branches based on customer responses.

#### **See Also**

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle eMail Center](#)

## 1.4 Architecture of Oracle Advanced Outbound

Topics include:

- [Advanced Outbound Tech Stack](#)
- [Advanced Outbound Modules](#)
- [Advanced Outbound Architecture Diagram](#)

- [Advanced Outbound System Operation Diagram](#)

## 1.4.1 Advanced Outbound Tech Stack

Advanced Outbound is a Windows NT based product that utilizes a distributed architecture, in which the AO services machine(s), proxy server, Integrated Manager, and CTI server can all be independently deployed. Both Oracle Campaign Plus and Oracle Predictive run as Windows NT services.

Advanced Outbound requires the following:

- Oracle Universal Work Queue (UWQ), which serves as a work portal for work items generated through interaction channels and CRM applications
- Advanced Outbound Proxy Server, which is shipped with Advanced Outbound
- Oracle Interaction History, which tracks business application data for each interaction or call attempt, and associates media items, such as phone calls and email messages with each interaction. Oracle Interaction History is shipped with Oracle CRM Foundation 11.5.4
- Oracle Advanced Inbound 11.5.4 modules: Oracle Telephony Manager and Call Center Connectors (for non-Oracle Predictive calls)
- Microsoft Management Console v1.1, which serves as the foundation for Oracle Integrated Manager and Internet Explorer 4.01 or higher with Active Desktop.
- Oracle Marketing Online 11.5.4, which is the source of all campaigns and calling lists
- Oracle TeleSales 11.5.4, which serves as agent's desktop application
- Entegrity Solutions (Gradient) Distributed Computing Environment (DCE) v4.0 for communication with and between services
- Oracle Client 8.0.6, configured to act as a gateway to the customer's Oracle 8i CRM database instance
- Oracle ODBC driver v8.0.6.2
- Either Dialogics CT-Connect (v4.0 or v5.0, default is 5.0), or Cisco ICM v4.1
- If Oracle Predictive is being used, VDU boards as specified in the *Oracle Predictive Installation Guide*

## 1.4.2 Advanced Outbound Modules

Oracle Advanced Outbound consists of the following modules:

- Oracle Campaign Plus list manager
- Oracle Predictive dialing engine

Oracle Integrated Manager serves as the administrative tool for both.

Both Oracle Campaign Plus and Oracle Predictive run as Windows NT services. For scalability, there may be multiple copies of Oracle Campaign Plus running at one time, each serving distinct calling lists and each operating as a separate Windows NT service, on one or many machines.

### **Oracle Campaign Plus list manager**

Oracle Campaign Plus is responsible for servicing record requests from Oracle TeleSales. Based on the dialing mode (such as preview, progressive, or Oracle Predictive) defined for the campaign or specified by the record request, Oracle Campaign Plus will either send the record to the application via UWQ or forward the agent's request to the Oracle Predictive service where it is matched up with a Oracle Predictively dialed call.

Based on the call outcome, as reported by either the CRM application or by the Oracle Predictive service, Oracle Campaign Plus will recycle the record, scheduling it for call back if appropriate.

Oracle Campaign Plus is also responsible for calculating certain statistics in order to make decisions on record release strategies, such as list quotas and list scores.

### **Oracle Predictive dialing engine**

Oracle Predictive is responsible for making dial requests through the CTI server and monitoring the call progress as the call is dialed. If a human voice is not detected, then Oracle Predictive is responsible for notifying Oracle Campaign Plus to recycle the record. If a human voice is detected, Oracle Predictive is responsible for initiating the call transfer, via the CTI server, to an available agent workstation.

In order for Oracle Predictive to initiate the call transfer and to appropriately predict the number of calls that must be placed, it maintains current status information on all logged-in Oracle Predictive agents.

### **Oracle Integrated Manager**

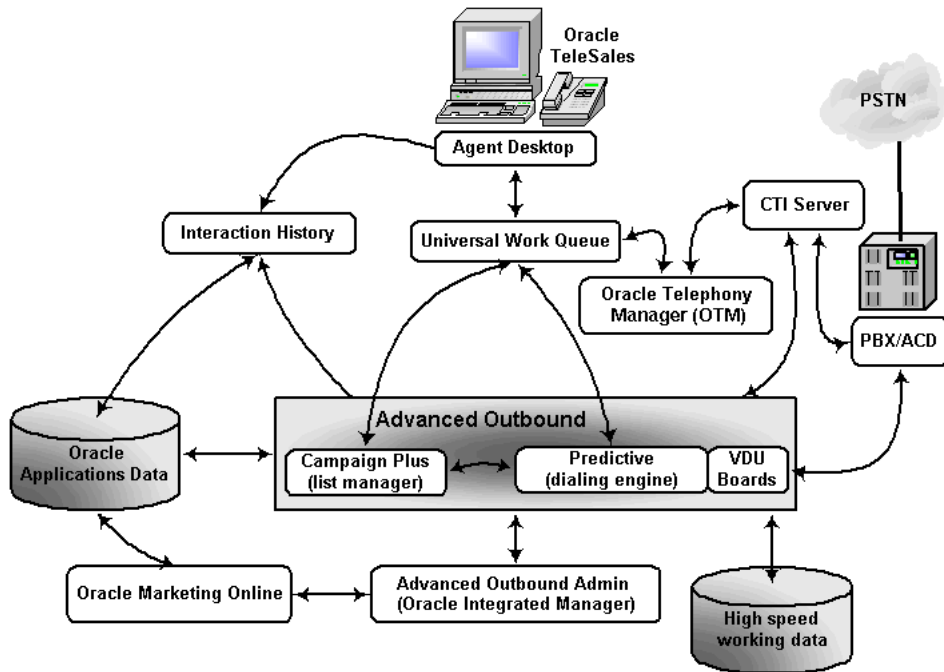
Integrated Manager (IM) is used to define and configure individual Oracle Campaign Plus and Oracle Predictive services. Each Oracle Campaign Plus service corresponds to one "target list" generated by Oracle Marketing Online. IM is used to segment the Oracle Marketing Online list into individual Oracle Campaign Plus calling lists, e.g. by time zone. Wizards available in the Integrated Manager

interface will guide a Interaction Center administrator through the steps of defining list selection criteria, release strategies and criteria, and recycling algorithms. Campaigns defined by Oracle Marketing Online, and targeted for automated dialing, may be loaded and made available to Oracle Campaign Plus here.

### Oracle Advanced Outbound Proxy Server

Oracle Campaign Plus requires a proxy service that enables communication with Oracle Universal Work Queue. The proxy service runs on the Windows NT machine that is running Campaign Plus. The proxy server informs the technology stack servers about the existence of Advanced Outbound services.

### 1.4.3 Advanced Outbound Architecture Diagram



Because Advanced Outbound employs Oracle Predictive dialing to serve the needs of dozens, or even hundreds of Interaction Center agents, it can place very high volumes of calls. Oracle Predictive dialing may dial three to ten calls, on average, before reaching a human voice that is then connected to an Interaction Center agent. This level of activity puts demands on the Oracle Campaign Plus server that are

best accommodated by using a private storehouse of working data that can be accessed at high speed... called the 'high speed working data' in the architecture diagram. This data is stored in files that are located on disks attached to the Oracle Campaign Plus server machine(s), and are accessed via a cache and other techniques designed to optimize throughput.

## 1.4.4 Oracle Advanced Outbound Functional Flow Diagrams

### Assumptions

Oracle Marketing Online has already created an outbound calling campaign and identified a list of records to be called.

### Beginning and Ending Points

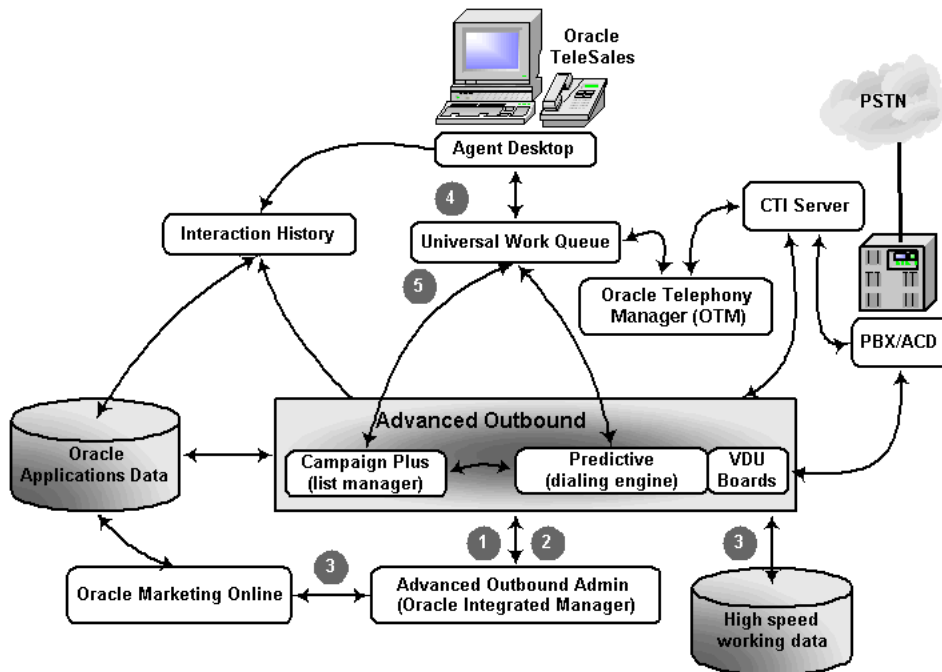
The Advanced Outbound functional flow begins with the creation and configuration of the Campaign Plus and Predictive services, and ends with Campaign Plus' periodic update of its private metadata in the database.

The diagrams in this topic group break this overall functional flow into the following three sections to provide greater clarity:

- [Functional Flow 1](#)
- [Functional Flow 2](#)
- [Functional Flow 3](#)

#### 1.4.4.1 Functional Flow 1

This diagram begins with the creation and configuration of the Oracle Campaign Plus and Oracle Predictive services, and continues through the agent request being passed through to Oracle Campaign Plus.

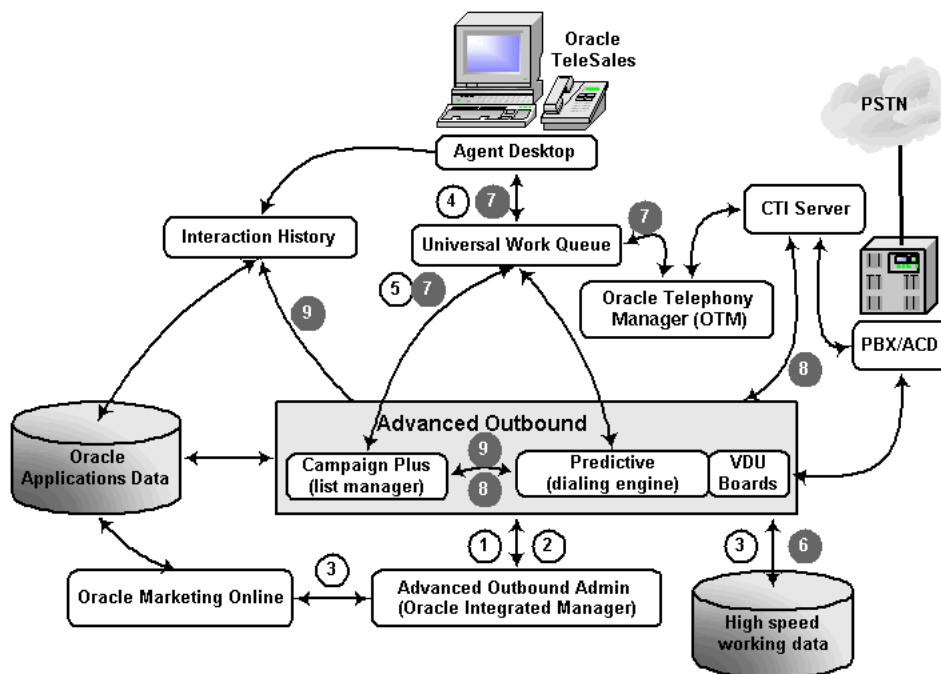


## Process

1. Create/configure Oracle Campaign Plus and Oracle Predictive Services.
2. Start Services.
3. Load data from Marketing tables into Advanced Outbound (and its high speed working data files).
4. Agent requests record for calling.
5. Request passed to Oracle Campaign Plus via DCE, by Universal Work Queue.

### 1.4.4.2 Functional Flow 2

This diagram begins with Oracle Campaign Plus selecting a record from the high speed working data, and continues through the logging of incomplete (busy) calls in Oracle Interaction History and the calls being recycled to Oracle Campaign Plus for later callback.

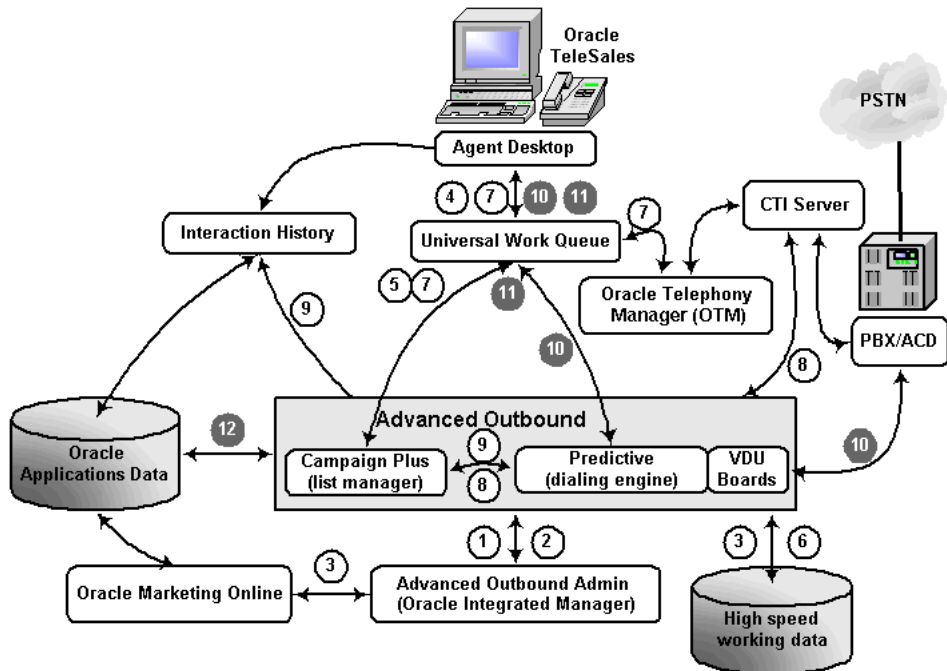


## Process

6. Oracle Campaign Plus selects record from working data.
7. Non-Oracle Predictive calls are delivered to the desktop (and to OTM for dialing) via UWQ (continue at step 11).
8. Upon request for Oracle Predictive calls, Oracle Predictive begins requesting records from Oracle Campaign Plus and dialing.
9. Incomplete (busy, etc.) calls are logged to Interaction History and recycled to Oracle Campaign Plus for possible callback

### 1.4.4.3 Functional Flow 3

This diagram begins with calls (in which a human voice is detected) being matched with an open agent request then delivered to the desktop via Oracle Universal Work Queue, and continues through Oracle Campaign Plus' periodic updates of its private metadata in the database.



### Process

- 10. Calls with voice detected are matched with an open agent request and delivered via UWQ.
- 11. Calls are returned to CP for recycling after completion by agent.
- 12. Periodically, CP updates its private metadata in the database.

## 1.5 Implementing Oracle Advanced Outbound

Topics include:

- [Integration Dependencies](#)
- [Prerequisites list](#)
- [The Implementation Process](#)

## 1.5.1 Integration Dependencies for Oracle Advanced Outbound

The following topics detail all integration dependencies for Oracle Advanced Outbound:

- [CRM Products](#)
- [Other Oracle Products](#)
- [Third Party Products](#)

### 1.5.1.1 CRM Products

Oracle Advanced Outbound depends on the following Customer Relationship Management (CRM) products:

- CRM Foundation, including Interaction History and Universal Work Queue (non media component)
- Oracle Marketing Online
- Oracle Telesales
- Oracle Advanced Inbound
  - Oracle Universal Work Queue (media component)
  - Oracle Telephony Manager
  - Call Center Connectors

These products must be completely installed and setup prior to the installation and implementation of Oracle Advanced Outbound. For more information on installing these products, please refer to each product's individual Installation and Implementation Guides. Each of these products may have its own prerequisites, for example TeleSales and UWQ require Oracle Resource Manager and can integrate with Oracle HRMS.

### 1.5.1.2 Other Oracle Products

These products must be completely installed and setup prior to the installation and implementation of Oracle Advanced Outbound.

### Oracle 8i Database with Oracle 8 Client 8.0.6

The Oracle CRM system database must be installed and configured prior to the installation of Oracle Advanced Outbound. You will be required to enter database information during installation and configuring of Oracle Advanced Outbound.

Oracle Advanced Outbound accesses the system database using Oracle 8 Client version 8.0.6.

### **Oracle ODBC Driver, Version 8.0.6.2**

ODBC provides database connectivity. The system administrator must define the DSN (data source name) using the Oracle ODBC driver. Oracle Advanced Outbound requires one DSN. This DSN name must be the same name as the Oracle TNS name.

#### **1.5.1.3 Third Party Products**

These products must be completely installed and setup prior to the installation and implementation of Oracle Advanced Outbound.

### **Entegrity Solutions (Gradient) PC-DCE 4.0**

To facilitate communication among services and clients, Oracle Advanced Outbound operates within a Distributed Computing Environment (DCE).

Entegrity Solutions (Gradient) PC-DCE is middleware that passes remote procedure calls (RPCs) between applications or services and maintains a directory of available services that can interconnect.

DCE consists of three components:

- PC-DCE Cell Directory Server
- PC-DCE Security Server
- PC-DCE Runtime (client)

The environment is organized into a "cell"; PC-DCE manages the cell. When a DCE client or server boots, it registers itself with the cell. When a client needs the services of a server, the DCE client software uses the DCE cell services to establish a connection directly to the server.

The DCE cell server software may reside on any machine in the network with sufficient resources. Oracle provides DCE configuration scripts that configure the DCE cell directory entries required by Oracle Advanced Outbound.

### **Dialogic CT-Connect Client 4.0 or 5.0, or Cisco ICM 4.1**

These are middleware products that provide a command interface between computers and telephony -- computer-telephony integration (CTI). They enable Oracle Predictive to issue dialing commands to the PBX and to route successful calls to the agent desktop.

### Microsoft Management Console (MMC)

MMC is the underlying platform for Oracle Integrated Manager.

### Microsoft Internet Explorer 4.01, SP1 or SP2, with Active Desktop

Oracle Advanced Outbound is configured using Integrated Manager. This facility requires libraries that are part of the Internet Explorer Active Desktop.

There are two ways to verify that active desktop is installed:

1. If you have active desktop installed, when you minimize a window to the task bar, you can click on the task bar icon for that window to restore the window, then click on the task bar icon for that window again to re-minimize it. Non-active-desktop-equipped machines won't do this.
2. Right-click in the desktop area of your screen, the pop-up menu should contain an entry for active desktop.

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**Note:** Internet Explorer (IE) versions 4.01 through 4.72 are the only versions that include Active Desktop. You cannot have any later version installed, and then try to install Active Desktop along with it. However, Integrated Manager will still work if you can install one of the 4.x versions of IE with Active Desktop, and subsequently upgrade it to a newer version of IE, such as 5.5. The practical limitation of this is that installing Integrated Manager on systems that are pre-configured with IE 5, such as some Windows NT 4.0 machines, and that never had IE 4.x with Active Desktop installed on them, will be awkward and may require completely re-installing the operating system, then IE 4.x with Active Desktop, then updating to IE 5.x if desired.

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## 1.5.2 Implementation Prerequisites

Before you can implement Oracle Advanced Outbound, you must first perform the following tasks:

1. Install Oracle Foundation, including Resource Manager, Interaction History, and Universal Work Queue (non-media component).

Detailed information on this step can be found in the *Installing Oracle Applications* documentation.

2. Obtain an Oracle Applications user account with access to the Call Center Admin responsibility.

3. Obtain a Windows NT user account with administrator level rights for each necessary server.

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**Note:** Installation and maintenance of Oracle CRM applications will require an Windows NT user account with administrator-level privileges to each server running the application. The creation of user accounts for administration of Oracle CRM servers is the responsibility of the customer.

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4. Install and configure Oracle Marketing Online.

Detailed information on this can be found in the *Installing Oracle Marketing Online* documentation.

5. Install and Implement Oracle Advanced Inbound

- Install and configure a switch that is certified and supported by Oracle.
- Install and configure third party CTI middleware that is certified and supported by Oracle.
- Install and configure Oracle Call Center Connectors.
- Install the Oracle Telephony Manager Server.
- Install the Oracle Routing Server (optional).
- Install Oracle Universal Work Queue Server.

Detailed information on this step can be found in the *Oracle Telephony Manager Implementation Guide*.

6. Install the Oracle Client 8.0.6 with Oracle ODBC drivers 8.0.6.2 on the machines that run any portion of Oracle Advanced Outbound.

You must install these before installing the Advanced Outbound Call Center Services, because they include .dll files you will need during the installation.

7. Install Call Center Services from the Call Center Applications 11i CD, including:
  - Oracle Campaign Plus Server
  - Oracle Predictive Server
  - Integrated Manager
  - Advanced Outbound Proxy Server

- Oracle Service Monitor
- Oracle Directory Maintenance
- Oracle Service Control

Detailed information on this step can be found in the *Oracle Campaign Plus Installation Guide* and *Oracle Predictive Installation Guide*.

8. Follow all other installation procedures in the *Oracle Predictive Installation Guide* and the *Oracle Campaign Plus Installation Guide*.

## 1.6 The Implementation Process

This topic group provides a list of high level steps for the implementation process as well as step by step instructions for implementing Oracle Advanced Outbound.

Topics include:

- High level steps
- Detailed information for each high level step

### 1.6.1 High Level Implementation Steps

To implement Oracle Advanced Outbound, you must perform the following tasks:

1. [Configure the DCE client for both Oracle Predictive and Oracle Campaign Plus.](#)
2. [Configure the Oracle Client for both Oracle Predictive and Oracle Campaign Plus.](#)
3. [Configure the ODBC Drivers for both Oracle Predictive and Oracle Campaign Plus.](#)
4. [Configure Integrated Manager for both Oracle Predictive and Oracle Campaign Plus.](#)
5. [Configure Service Monitor.](#)
6. [Set the Service Monitor to Start Automatically.](#)
7. [Create an lcd file.](#)
8. [Create a virtual PBX.](#)
9. [Create the VDUs.](#)
10. [Create a Oracle Predictive Service.](#)

11. [Configure Oracle Campaign Plus.](#)
12. [Configure the Proxy Server.](#)
13. [Set the Proxy Server to Start Automatically](#)
14. [Create a Oracle Campaign Plus Service in Oracle Marketing Online.](#)
15. [Create a list.](#)
16. [Create a Oracle Campaign Plus Campaign.](#)
17. [Start the Oracle Predictive service\(s\).](#)
18. [Start the Oracle Campaign Plus service\(s\).](#)
19. [Load the list.](#)
20. [Set filters for logs.](#)
21. [Activate alerts.](#)
22. [Configuring a TeleSales User for Advanced Outbound](#)

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**Note:** Many of these steps are "configuration" tasks. Normally, you perform these tasks once during the initial installation. If names of services or databases ever change, then you may have to perform the configuration tasks again so Advanced Outbound can use the new names.

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## 1.6.2 Configuring the DCE Client

Use the following steps to configure the PC-DCE client.

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**Note:** You need to configure DCE on each machine that is running part of Advanced Outbound. If you are running Oracle Campaign Plus on one machine and Oracle Predictive on another, then you need to configure DCE on both machines.

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### Steps

1. From the PC-DCE Service Panel, click **Configure**.

The PC-DCE Configuration screen appears, displaying the PC-DCE Client tab.

2. In the CDS Service Host Name field, type the name of the machine where you installed the DCE cell.
3. Ensure the Configure Client Daemon checkbox is checked.
4. In the Administrator Principal Name field, type the administrator principal name (usually cell\_admin).
5. In the Administrator Password field, type the admin password for the DCE cell.
6. Click the Options tab and make sure only the Start Daemons During System Boot checkbox is checked.
7. Click the PC-DCE Client tab, then click **OK**.  
The Configuration Status screen appears.
8. When the Configuration Status screen tells you the configuration was successful, click **Close**.

You return to the PC-DCE Configuration screen.

### 1.6.3 Configuring Oracle Client 8.0.6.2

You must bring the Tnsnames.ora file from the database onto the machine that is running Integrated Manager. There are three ways to accomplish this:

1. From the Oracle database, get the tnsnames and the sqlnet files and copy them to <install directory>/net80/admin directory.
2. From the <install directory>/net80/admin directory, open the existing tnsnames file and manually configure it.
3. Go to Programs, Oracle for Windows NT, Oracle Net 8 Easy Config. and use this tool to configure the tnsnames file.

### 1.6.4 Configuring the ODBC Drivers

Use the following steps to configure the ODBC Drivers for both Oracle Campaign Plus and Oracle Predictive.

#### Steps

1. Click **Start, Settings, Control Panel**, and choose **ODBC Data Sources**.  
The ODBC Data Source Administrator screen appears
2. On the system DSN Tab click the **Add**.

The Create New Data Source screen appears.

3. From the Create New Datasource screen, select the Oracle ODBC Driver data source.
4. Click **Finish**.

The Oracle ODBC Driver Setup screen appears.

5. In Data Source Name field on the Oracle ODBC Driver Setup screen, enter the following:
  - Data Source Name: This is the name of the database (can be an alias).
  - Data Source Service Name: Actual name of the database. This is the SID in the Tnsnames.ora file in Oracle8i/ADMIN.

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**Note:** It is a requirement that the Data Source Name and the Data Source Service Name be the same, since the same name is used by different software components via different technologies to connect to the Oracle database.

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## 1.6.5 Configuring Oracle Integrated Manager

Use this procedure to configure Oracle Integrated Manager.

### Steps

1. From your desktop, click **Start**, then select **Programs, Oracle, Integrated Manager**, and **Registry Configuration Console**.

The Registry Configuration Console appears.

2. In the System Database Information area, specify the data source name, user ID, and password for the Oracle CRM system database. If no datasource names appear in the list, click **Create** and make one.

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**Note:** Please note that the user ID and password are for Oracle AOL users, not SQL users.

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3. Select the Service Monitor (POM) Server Name to be used for Oracle Campaign Plus.

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**Note:** You should record the POM server name for later use (IM\_POM is the preseeded value and should not be changed).

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---

4. Click **Apply**, and then quit the Registry Configuration Console.

## 1.6.6 Configuring the Service Monitor

Use the following steps to configure the service monitor for Oracle Campaign Plus.

### Steps

1. From the Windows Start menu, Click **Programs, Oracle, Integrated Manager, Administrator MMC Console**.  
Oracle Integrated Manager appears on your screen.
2. From the Integrated Manager tree view, expand the **Oracle Integrated Manager** node, then expand the **Services Configuration** node, then expand the **Microsoft Windows Network** node.
3. From the list of domains, find the domain on which your machines reside and expand it.
4. From the list of machines, find the server on which you installed the services. Expand the machine's node until you find the **Service Monitor**.
5. Right-click **Service Monitor**, and select **Properties**.
6. In the General tab, select the POM server name in the Service name box (IM\_POM). Click **Apply**.
7. On the DCE Logon tab, enter the cell admin DCE principal and password and click **Apply**.
8. On the Log File Dir tab, click **Browse** to locate the ServiceMonitorLogs file directory. Highlight the folder and click **OK**, then click **Apply**.
9. On the Servers tab, verify that the Oracle Campaign Plus and Oracle Predictive server machine names are listed. If the servers are not listed, you must create them. To do so:
  - From the navigation tree, click **Server Monitor**.
  - Open it to see **Servers Being Monitored**.

- Right-click **Servers Being Monitored**, then click **New**, and **Service Monitor Server**.
  - Click **Browse**.
  - Select the desired server and click **OK**.
  - Click **Add Server** and repeat steps 8 and 12 for every machine you want to add.
10. Click **OK**.

### 1.6.7 Setting the Service Monitor to Start Automatically

Use the following steps to set the Service Monitor to start automatically. You will need a name and password for the windows NT user account, on the machine that will be running the service, with administrator privileges to complete this step.

#### Steps

1. Click **Start, Settings, Control Panel**.  
The Windows Control Panel appears.
2. From the Control Panel, click **Services**, and select **Oracle Service Monitor**.
3. Click **Startup**.  
The Service screen appears.
4. Click **Automatic**.
5. On the Service screen, click the **This Account** radio button, then click ... (the browse button).
6. The browse screen appears.
7. From the browse screen, select the Windows NT user name under which this service will run. It must have administrator privileges.
8. In the Password field, type the password for this user. Confirm the password by typing it again in the Confirm Password field, and click **OK**.  
You return to the Services screen.
9. Click **Start** to start the service for the first time.
10. Click **Close**.

## 1.6.8 Creating an LCD File

Oracle Predictive uses the LCD file to determine the string format for dialing calls. There may be several methods to dial calls that vary in length and prefix. For example, internal extensions typically require only four digits, but no prefix to get an outside line (for example, 3543). Local calls require seven digits and a prefix to get an outside line (for example, 8 555 6839). Long distance calls require ten digits, a prefix to get an outside line, and a “1” (for example, 9 1 789 555 4329). Without an LCD file, the dials may be placed improperly, resulting in an incomplete dial.

The LCD file is a formatted text file that can accommodate as many unique strings as needed. A sample file is provided as part of the installation and can be found at the following URL on the server running Oracle Predictive:

\\Oracle\OraclePredictive\Data\default.lcd. When editing the LCD file, always use the Windows Notepad Editor to ensure that control characters are not added to the file.

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**Caution:** You should not use Microsoft Wordpad or any other text editing tool to create or edit these files, as it may leave unwanted control characters in the LCD file.

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Use the following steps to create a LCD file.

### Steps

1. Go to the Oracle/OraclePredictive/Data directory and copy one of the existing LCD files.
2. Rename the file to whatever you want it to be.
3. Open the newly renamed file in Microsoft Notepad.
4. Scroll to the Digit Strings section at the bottom of the file and follow the instructions there.
5. Save the new LCD file.

## 1.6.9 Creating a Virtual PBX for CT-Connect

Use the following steps to create a virtual PBX, which is used by Oracle Predictive to reference the proper instance of the telephony middleware and physical PBX. If you are using Cisco ICM, refer to the Creating a Virtual PBX for Cisco ICM topic.

## Prerequisites

Before you can create a virtual PBX, you must have already created a LCD file for the virtual PBX.

## Steps

1. From the Windows Start menu, select **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.

Oracle Integrated Manager appears on your screen.

2. From the Integrated Manager tree view, expand the **Oracle Integrated Manager** node, then right-click the **PBX Configuration** node.

3. Click **New**, then **Virtual PBX Service**.

The Create Virtual PBX Service Wizard appears.

4. Click **Next** to begin creating the virtual PBX.

5. In the PBX Name field, type the PBX name (this name can be whatever you want it to be).

6. Click **Next**.

7. In the PBX Type field, click the drop-down arrow and select the desired PBX type from the list.

8. Click **Next**.

9. In CTI Enabler field, click the drop-down arrow and select the CTI enabler type from the list.

10. In the CTI server name field, type the machine name of the CTI server.

11. In the CTI network type field, click the drop-down arrow and select the desired CTI network type from the list (usually `ncacn_ip_tcp`).

12. In the Actual PBX name field, type the name of the CTI link that was configured on the CTI server.

13. Click **Next** until you arrive at the screen asking for the path to your LCD file.

14. Click ... (the browse button) for the field requiring the path to your LCD file.

The Browse screen appears.

15. From the Browse screen, locate your LCD file (usually located in the `/Oracle/OraclePredictive/data` directory).

16. Click **OK**.

You return to the Create PBX Wizard.

**17. Click Next.**

A summary screen appears listing all of the selections you have chosen.

**18. If all of the information is correct, click Finish.**

A pop up screen appears, telling you that the creation was successful.

**19. Click OK to close this pop up screen.**

## 1.6.10 Creating a Virtual PBX for Cisco ICM

Use the following steps to create a virtual PBX if you are using Cisco ICM.

### Prerequisites

Before you can create a virtual PBX, you must have already created a lcd file for the virtual PBX.

### Steps

**1. From the Windows Start menu, select Programs, Oracle, Integrated Manager, and Administrator MMC Console.**

Oracle Integrated Manager appears on your screen.

**2. From the Integrated Manager tree view, expand the Oracle Integrated Manager node, then right-click the PBX Configuration node.**

**3. Click New, then Virtual PBX Service.**

The Create Virtual PBX Service Wizard appears.

**4. Click Next to begin creating the virtual PBX.**

**5. In the PBX Name field, type the PBX name (this name can be whatever you want it to be).**

**6. Click Next.**

**7. In the PBX Type field, click the drop-down arrow and select the desired PBX type from the list.**

**8. Click Next.**

**9. In CTI Enabler field, click the drop-down arrow and select the CTI enabler type from the list.**

10. In the CTI server name field, type the desired CTI server name.
11. In the CTI network type field, click the drop-down arrow and select "Not Applicable" from the list.
12. In the Actual PBX name field, type the peripheral ID number for your switch.
13. Click **Next** until you arrive at the screen asking for the path to your LCD file.
14. Click ... (the browse button) for the field requiring the path to your LCD file.  
The Browse screen appears.
15. From the Browse screen, locate your LCD file (usually located in the /Oracle/OraclePredictive/data directory).
16. Click **OK**.  
You return to the Create PBX Wizard.
17. Click **Next**.  
A summary screen appears listing all of the selections you have chosen.
18. If all of the information is correct, click **Finish**.  
A pop up screen appears, telling you that the creation was successful.
19. Click **OK** to close this pop up screen.
20. Return to the Properties screen and click the Special Transfer Flags tab.  
The Special Transfer Flags tab appears.
21. In the Transfer Flag 1 field, type the port number.
22. Click **OK**.

## 1.6.11 Creating VDUs

Use the following steps to create a VDU.

### Steps

1. From the Windows Start menu, select **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.  
Oracle Integrated Manager appears on your screen.
2. From the Integrated Manager tree view, expand the **Oracle Integrated Manager** node, then expand the **PBX Configuration** node.

3. Right-click **Voice Detection Units**.
4. Click **New**, then **Virtual PBX VDU**.

The Create Virtual PBX VDU screen appears, displaying a list of VDU types.

5. From the Create Virtual PBX VDU screen, select the desired VDU type (usually T1).

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**Note:** The T1 selection also supports E1 cards.

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6. Click **Next**.
7. Type the number of cards and the number of ports per card in the provided fields.
8. Click **Next**.
9. Type the base extension and the extension increment value in the provided fields (this extension should be provided by the PBX administrator).

An example of a block of twenty four extensions is 5001-5024. Enter the first extension from the extension block, which would be 5001 in this example. This extension block is contiguous and increments by one: enter 1 in the Extension increment value field. If you want to change the extension block to 5001 - 5048, 2 for the extension increment value.

If the extension block is not contiguous or has differing increments, simply enter information to create the proper number of references, and then go back and correct all of the extensions. This is still much faster and more accurate than creating everything yourself.

10. Click **Next**.
11. Review the information that you entered and if it's acceptable, click **Finish**.
12. Click **OK** to return to Integrated Manager.

## 1.6.12 Creating a Oracle Predictive Service

Use this procedure to create an Oracle Predictive service.

### Steps

1. From the Windows Start menu, Click **Programs, Oracle, Integrated Manager, Administrator MMC Console**.

Oracle Integrated Manager appears on your screen.

2. From the Integrated Manager Console tree, expand the **Oracle Integrated Manager** node, then expand the **Outbound** node, then expand the **Predictive Services** node.

3. Right-click **Predictive Services**.

4. From the popup menu select **New**, then **Predictive Service**.

The Create Oracle Predictive Services Wizard appears.

5. Click **Next** to start creating a new service.

6. Type a name for the service. You may use numbers 0 to 9, letters A to Z, and underscore characters. The service name must begin with a letter.

7. Select the Service Location from the drop-down list. The Service Location is the host machine where this service should be located. Click **Next**.

8. Select the hardware layer. Click **Next**.

9. Enter the numeric country code used for telephone access where the Predictive server resides. For example, the U.S. is “1”, the United Kingdom is “44”, and Germany is “49.”

10. Enter the numeric local area code where the Predictive server resides. Use the local city code outside of the US and Canada. Click **Next**.

11. In the Data Source field, use the drop-down list to select the database instance that will be used to store the Predictive service information. The database reference is also used to read the VDU reference information.

12. In the User ID field, enter an AOL (Applications Object Library) user that has been created and will be used by the Predictive service to access the database instance. An example of an AOL user is someone who has the responsibility to administer the call center applications.

13. In the Password field, type the password for the AOL user you entered from the previous step.

14. In the Confirm password field, type the AOL user password again to confirm it. Click **Next**.

15. In the DCE principal field, enter the DCE principal and password, which you chose when you configured your DCE cell. Click **Next**.

The default is cell\_admin.

16. Select the time of day that you want the service to start, then click the days of the week on which you want your service to run. It will start only on the days of the week you check. Click **Next**.
17. If you want Oracle Predictive to shut down automatically every day, then select the Automatically shut down Predictive check box, and specify a shutdown time. Click **Next**.
18. Select the full path for the Log file directory. This is where the log files will be located. Use the browse feature to find the location. The UNC log is defined by your selection. Click **Next**.
19. In the Command line field, type the full path for the Oracle Predictive executable file or use the browse feature to find the file. Click **Next**.

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**Note:** If you cannot browse to the file itself, then you do not have Active Desktop installed.

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20. From the PBX field, select the PBX to associate with your Oracle Predictive service, and click **Next**. If you need to create a new PBX, refer to the Creating a Virtual PBX and Creating VDUs topics earlier in this guide.
21. You do not need to create new Voice Detection Units, because you already created them in the Creating VDUs topic.
22. Review the Oracle Predictive service summary information. Use **Back** to make any changes. Click **Finish**.
23. Click **Yes** to create the new Oracle Predictive Service.
24. Click **OK** to return to Integrated Manager.

### 1.6.13 Configuring Oracle Campaign Plus

Use the following steps to configure Oracle Campaign Plus.

#### Steps

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager,** and **Administrator MMC Console**.
2. From the Integrated Manager tree view, expand the **Oracle Integrated Manager** node, expand the **Services Configuration** node, then expand the **Microsoft Windows Network** node.

3. From the list of domains, click the domain on which your machine resides.
4. From the list of machines, find the server on which you installed the services. Expand the machine's node until you find **Campaign Plus Services**.
5. Right-click **Campaign Plus Services**, then select **Properties**.

The Campaign Plus Service Configuration Properties box appears, displaying nine tabs. You must configure each of these tabs.

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**Note:** You must click **Apply** on each tab, before moving on to another tab.

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6. On the General tab screen, ensure the active flag check box is unchecked and set the Start Time to the desired time you want your Oracle Campaign Plus services to start. The times should be specified in the Oracle Campaign Plus server machine's local time.

The Network Machine Name field will automatically populate with the name of the server where Oracle Campaign Plus is installed.

The Active flag check box will be unchecked by default and can be checked and unchecked.

The clock can be set to various times and the **Apply** button will become enabled. You can change the time by typing a number in the Start Time field or by using the up and down arrow keys on the right in the Start Time field. The hour must be a number between 1 and 12, and the minutes must be between 0 and 59.

7. Click **Apply**.
8. Click the DCE Logon tab.  
The DCE Logon tab screen appears.
9. On the DCE Logon tab, type the cell principal name and password (which you chose when you configured your DCE cell) in the provided fields.

The cell principal name is usually `cell_admin`.

You must know what the cell password is for the particular DCE cell you are on.

10. Click **Apply**.
11. Click the Database Logon tab.

The Database Logon tab screen appears.

12. On the System Database Logon tab, select the database name from the list of available ODBC system DSNs displayed in the database drop down list and type the database user password into the Database password field.

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---

**Note:** Please note that the login and password are for an Oracle AOL user, not a sql user.

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---

This DSN must map to the system database that the Oracle Campaign Plus schema is on. The display field of the System database drop down box will populate with the selected DSN. The DSNs available for selection will be those located on the Oracle Campaign Plus server machine.

13. Click **Apply**.
14. Click the EXE Path tab.
15. On the EXE Path tab, click **Browse** to select the path and the executable name used by Oracle Campaign Plus.

The Browse for Folder screen appears.

16. Expand the folder CampaignPlusBin and highlight CampaignPlus.exe. Click **OK**.

The Executable field is populated with a value similar to  
D:\Oracle\OracleCampaignPlus\bin\campaignplus.exe.

17. Click **Apply**.
18. Click the Log Files tab.

The Log Files tab screen appears.

19. On the Log Files tab, click **Browse** to select the path of the log files to be used by Oracle Campaign Plus and highlight CampaignPlusLogs. Click **OK**.

The Local directory field is populated with a value similar to  
D:\Oracle\OracleCampaignPlus\logs and the Network directory field is  
populated with a value similar to \\Qasrv1\CampaignPlusLogs.

20. Click **Apply**.
21. Click the Calendar Files tab.

The Calendar Files tab screen appears.

22. On the Calendar Files tab, Click **Browse**.

The Browse screen appears, displaying a list of calendar file directories.

23. From the list of calendar file directories, select the desired Oracle Campaign Plus calendar file directory.

24. Click **Apply**.

25. Click the Recycle Files tab.

The Recycle Files tab screen appears.

26. On the Recycle File tab, click **Browse**.

The Browse screen appears, displaying a list of recycle file directories.

27. From the list of recycle file directories, select the desired Oracle Campaign Plus recycle file directory.

28. Click **Apply**.

29. Click the Transaction Files tab.

The Transaction Files tab screen appears.

30. On the Transaction Files tab, click **Browse**.

The Browse screen appears, displaying a list of transaction file directories.

31. From the list of transaction file directories, select the desired Oracle Campaign Plus transaction file directory.

32. Click **Apply**.

33. Click the Data Files tab.

The Data Files tab screen appears.

34. On the Data Files tab screen, click **Browse**.

The Browse screen appears, displaying a list of data file directories.

35. From the list of data file directories, select the desired Oracle Campaign Plus data file directory.

36. Click **Apply**.

37. Click **OK** to return to Oracle Integrated Manager.

## 1.6.14 Configuring the Proxy Server

Campaign Plus is not on the current Oracle technology stack. Because it needs to communicate with the UWQ server which is on the Oracle technology stack, a proxy service is required as an intermediary service between the two. The Advanced Outbound proxy service is installed and runs on the Windows NT server that is running Campaign Plus. It is installed automatically when Advanced Outbound is installed.

Because the proxy service must communicate with services on two different technology stacks, it must be configured in two parts, one for the Oracle technology stack, and one for the Campaign Plus technology stack.

Use the following steps to configure the proxy server for Advanced Outbound.

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**Note:** The proxy server software is installed along with Oracle Campaign Plus. You will run it on one of your Oracle Campaign Plus servers.

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### Steps

1. On the machine that will be running the proxy service, click **Start, Programs, Oracle, Call Center, Service Configuration**.

The Oracle Service Configuration screen appears, displaying the config tab.

2. From Installed services checkbox area, click the Campaign Plus/Predictive Proxy Server checkbox. Click **Next**.

The Campaign Plus/Predictive Proxy Server tab appears next to the config tab.

3. Click the Campaign Plus/Predictive Proxy Server tab.
4. Click **New Server**.

The New Server screen appears.

5. In the Name field, type a name for the proxy server.

---

---

**Note:** The proxy server name you choose here can be anything you want, but please record it for later use.

---

---

6. Click **OK**.

You are returned to the Campaign Plus/Predictive Proxy Server screen and the Name field updates to reflect the new proxy server name.

7. In the Executable field, type the full path for the executable file.

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**Note:** The field will display the default path, please verify this path is correct. If you altered the default location in any way during installation, you will need to type your path.

---

---

8. In the Port field, type the port number (the default number is 3202).
9. In the Output Level field, use the up or down arrow to select the desired output level (the default number is 1).

---

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**Note:** You can select any number between 1 and 4. Higher numbers will generate more detail in the proxy server log.

---

---

10. In the Database field, type the database using the specified format (Database login/password@database name).

---

---

**Note:** Must be for a valid Oracle AOL user and password.

---

---

11. Click **Apply**.
12. Click **OK**.

The following steps are performed through Universal Work Queue to establish the proxy services participation in the server group.

13. Log in to Oracle Applications (the forms login) as a user with the Call Center Administrator responsibility.

A list of responsibilities appears.

14. Select the UWQ Server Locator Administrator responsibility.

The Server Locator Window appears, displaying the Server Group tab.

15. From the Server Group tab, select your previously created server group.
16. Go to the Server tab and click the **New** icon.
17. In the Name field, type the proxy server name you created in step 5.

18. In the Server Location field, type the server location. This is a free-form name reference that should be used consistently for all services in the server group.
19. In the Type Name field, click the drop-down arrow and select **Advanced Outbound Proxy Server** from the list.
20. The server group name you selected in step 16 will automatically populate the Member Group Name field. Copy this name into the Using Group Name field.
21. The DNS Name and IP Address fields are populated by the service when it starts.
22. In the Description field, you can add a description for the proxy service.
23. Click the **Save** icon to complete the configuration process for the proxy server.

### 1.6.15 Setting the Proxy Service to Start Automatically

Use the following steps to set the proxy service to start automatically. You will need a name and password for the windows NT user account, on the machine that will be running the proxy service, with administrator privileges to complete this step.

#### Steps

1. Click **Start, Settings, Control Panel**.  
The Windows Control Panel appears.
2. From the Control Panel, click **Services**, and select **OracleCampaignPlusPredictiveProxyServerXXX** (where "XXX" is the name you have given your proxy server)
3. Click **Startup**.  
The Service screen appears.
4. Click **Automatic**.
5. On the Service screen, click the **This Account** radio button, then click ... (the browse button).
6. The browse screen appears.
7. From the browse screen, select the Windows NT user name under which this service will run. It must have administrator privileges.
8. In the Password field, type the password for this user. Confirm the password by typing it again in the Confirm Password field, and click **OK**.

You return to the Services screen.

9. Click **Start** to start the proxy service for the first time.
10. Click **Close**.

## 1.6.16 Creating a Oracle Campaign Plus Service From Oracle Marketing Online

An Oracle Marketing Online campaign, campaign schedule, and list must be created and made available for campaign execution before creating the Oracle Campaign Plus Service. Each Oracle Campaign Plus Service is associated with one Oracle Marketing Online (OMO) list.

Some considerations you should keep in mind before creating your Oracle Campaign Plus Service are

- Calendar selection and setup
- Recycling algorithm selection and setup
- Oracle Campaign Plus list setup

Detailed discussions for each of these is outside the scope of an Implementation Guide, but are available in the Oracle Campaign Plus and Oracle Predictive Concepts and Procedures Guides.

While creating your Oracle Campaign Plus service you will need to specify Calendars and recycling algorithms. You can choose defaults and alter them later or you can set them up in advance. You also need to create Oracle Campaign Plus lists at the end of this service setup process. You will be able to add additional lists later.

Use the following steps to create a Campaign Plus Service from Oracle Marketing Online.

### Steps

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.
2. From the Integrated Manager tree view, expand the **Oracle Integrated Manager** node, then expand the **Outbound** node, then click **Oracle Marketing Campaigns** node.
3. Right-click the desired Oracle Marketing Campaign (this is technically an Oracle Marketing Online target list).
4. From the popup menu, select **All Tasks**, then **Create Campaign Plus**.

The Create Campaign Plus List Manager Wizard appears.

5. Click **Next** to start creating a new service.
6. In the Name field, type a name for the new service.

---

**Note:** The name must be exactly six characters long and start with a letter. Use only upper case letters A-Z, 0-9 and underscore.

---

7. From the drop-down list, select the Service Location, and click **Next**.  
The Service Location is the host computer where this service is located.
8. Select the **I want to create a service from scratch** checkbox. Click **Next**.
9. Select the time of day that you want the service to start.

---

**Note:** if you are using Oracle Predictive, set this time to 15 minutes after the Oracle Predictive Service startup time.

---

10. Select the days of the week on which you want the service to be started.  
It will start only on the days of the week you check.
11. Select the **This service should be set to active** check box to make the service active, and click **Next**.  
If you leave this box unchecked now, you can activate the service later.
12. From the drop down list in the Dialing Method field, select a dialing method.

**Table 1–1 Dialing Methods**

Type	Definition
Predictive	Uses an algorithm based on call anticipation to set the outbound call rate while screening noncontact outcomes. The answered call and the customer record arrive at the agent's workstation simultaneously. You must have an Oracle Predictive service installed and configured to select this method.
Preview	Allows the agent to review the customer profile before initiating a call.
Progressive	Sends the customer record to the agent application as the customer number is dialed.

13. If you choose **Predictive**, click **Dialing Parameters**. If you select **Preview** or **Progressive**, click **Next**.
  - a. From the Set Dialing Parameters dialog box, select the name of the Predictive Server from the list.
  - b. Select the No Answer Ring Count. This is the number of rings allowed until the record is given a No Answer status.
  - c. From the Abandon Limit field, select the maximum percentage for abandoned calls.
  - d. Check Enable Call Progress Detection to activate the checkboxes for answering machine and SIT detection.
  - e. Check Enable Answering Machine Detection and select the Answering Machine Strategy from the drop down list. The Available strategy will transfer the call to an agent. The requque strategy will recycle the record. The play message strategy will play a recorded message that is stored in the VDU. (If you select **Play Message**, choose the desired message from the drop down list in the Message field).
  - f. Check Enable SIT Detection and select the Reorder, Vacant, Intercept and Busy strategy (**Available** or **Requque**) from the drop down list in the corresponding field.
  - g. Click **OK** to return to the wizard. Then click **Next** to continue.
14. Select the time zone where the Oracle Campaign Plus server is located.
15. Select the Calendar File to be used. The calendar file defines when a list is open or closed. When a list is open, customer records can be released. When a list is closed, customer records cannot be released.

For more information on calendars, refer to Appendix A in this guide.
16. Select the Recycling File. The recycling you select determines when and how to recycle a customer record after a call has been attempted. For more information on recycling files, refer to Appendix B in this guide. Click **Next**.
17. Select the Data Source Name (DSN) from the available database names.
18. Type your database user ID and password. Confirm your password then click **Next**.
19. From the Available Fields list, select the Name Fields that will be used, in sequence, to assemble a customer/prospect name that is passed to the business application.

20. From the Available Fields list, select the Data Fields to be copied to the list record during a list load. Data fields are used in release control to limit release of certain records, in selection criteria to segment the list, in sorting specifications, and recycling scripts. PIN\_CODE, PHONE\_NUMBER, TELEPHONE\_TYPE, and TIME\_ZONE are default data fields. Click **Next**.

---

---

**Note:** There is a total limit of 1024 characters (2048 bytes) on the sizes of the name fields plus the data fields (excluding the four predefined data fields). The field sizes are displayed as a count of characters, not bytes.

---

---

21. Click **Wizard** to specify selection criteria.
22. From the SQL Wizard, select the Data Field, Operator, and Value you want to use. Click **OK** to return to the wizard.
23. Select the Reorganization Recheck check box if you would like Oracle Campaign Plus to update its copy of the list records and potentially redistribute them among Oracle Campaign Plus lists whenever Campaign Plus is shut down or a "reorganize" operation is started by Integrated Manager. Click **Next**.
24. Click **Wizard** to specify record release criteria.
25. From the wizard, select the Name/Data Field, Operator, and Value. Click **OK** to return to the wizard. Click **Next**.
26. Review the summary to verify your Oracle Campaign Plus Service selections. Use **Back** to make any changes. Click **Finish** to create the service.
27. Click **OK** to create the Oracle Campaign Plus Service.

### 1.6.17 Creating a List

You can create a list either when you create the Oracle Campaign Plus service or at a later time. You can also create some lists now and add or remove others later.

There are two main ways to create a list. You can create a list from scratch or create a list by copying an existing list. Since this is an Implementation guide, it is assumed that you will be creating a list from scratch; therefore, only the steps for creating a list from scratch are provided.

Use this procedure to create a list from scratch.

## Prerequisites

An active Oracle Campaign Plus Service must exist before you can create a list.

## Steps

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.
2. From Integrated Manager console tree, right-click the **Lists** node of the Oracle Campaign Plus service for which you want to create a new list.
3. From the popup menu select **New**, then **Campaign Plus List**.
4. Click **I want to create a new list from scratch**. Click **Next**.
5. Type a descriptive name for the list.
6. Select a dialing method from the drop-down list. Click **Next**.

**Table 1–2** *Dialing Methods*

Type	Definition
Predictive	Uses an algorithm based on call anticipation to set the outbound call rate while screening noncontact outcomes. The answered call and the customer record arrive at the agent's workstation simultaneously. You must have an Oracle Predictive service installed and configured to select this method. In addition to having the Predictive service installed and configured, you must also have the Campaign Plus service configured for predictive dialing and identified the Predictive Service that your Campaign Plus Service will use.
Preview	Allows the agent to review the customer profile before initiating a call.
Progressive	Sends the customer record to the agent application as the customer number is dialed.

7. Click **Wizard** to specify selection criteria.
  - a. Select a Name/Data Field on which you want to set conditions.
  - b. Select the operator for the condition.
  - c. Type the value of the condition.
  - d. Use **AND** or **OR** to set additional condition. Use the parenthesis buttons to set nested conditions.
  - e. Click **Add**.

- f. Click **OK** to return to the List wizard. Click **Next**.
8. From the drop-down list in the Calendar File field, select one of the existing calendars. The calendar defines the days of the week and hours of the day in which records in the list can be called. It also defines the time zone of the list. Each list must have a calendar.
- For more information on calendars, see Appendix A in this guide.
9. From the drop-down list in the Recycling List field, select a Recycling list. The recycling list is the default list into which records that are released from the list you are now creating will be recycled. Click **Next**.

---

**Note:** Because the choices for recycling lists are limited to those lists that are already created, you will save yourself some time by creating the callback list first. Then create the master list which uses the callback list as its recycling list.

---

10. Click **Release Strategy** to select the approach to be used to choose the list from which records will be released in response to each request.

The Release Strategy window appears.

11. Select a release strategy, then click **OK** to continue.

For more detailed information on the different types of release strategies, refer to the *Oracle Campaign Plus Concepts and Procedures Guide*.

**Table 1–3 Release Strategies**

Type	Definition
Quantum	Specifies the number of records to be released from the list before releasing records from the next list. Supports proportional calling across all list associated with the campaign or list group. In the Quantum box, type the number of records to be released sequentially from this list in the campaign. Zero indicates that it has no quantum restrictions.
Quota	Stops releasing records from a list when a specified number of successful records are released within a specified time. The number of records in the Quota box specifies the quota objective. The quota reset specifies the time period before the quota tally is reset to zero.
Average Score	Adjusts the quanta of the lists so that lists receiving better average results are called more heavily.

**Table 1–3 Release Strategies**

Type	Definition
Total Score	Adjusts the quanta of the lists so that the lists receiving better total results are called more heavily.

---

**Note:** The Average Score and Total Score strategies require feedback from the desktop application. These release strategies are not currently being implemented by Oracle TeleSales.

---

12. Click the **This is a time-based list** check box if this is to be a time-based list. Records in time based lists carry a time stamp that Oracle Campaign Plus can honor to determine when to place the next call to that record. If you want the time stamp to be honored, click the **The time stamp should be honored** check box.
13. Click the **This list is available when all lists are exhausted** check box if you want the records in this list to be available for release, regardless of their time stamps, if all other lists are exhausted. Click **Next**.
14. In the Selection Priority field, enter a selection priority from 1 to 32767. Do not use zero. Selection priorities are used to sequence the consideration of each list as the destination when a record is being loaded from the database. Each record being loaded is evaluated against the selection criteria associated with each list in the selection priority order. The first list whose criteria are met by the record becomes the list into which the record will be loaded. Each list must have a unique selection priority. If you attempt to assign a selection priority that is already in use, your new list will get that priority and the selection priorities of the existing lists will be shifted downward as necessary.
15. In the Release Priority field, enter a release priority from 1 to 100. Priorities 1-50 are high priorities and are preemptive; all lists with priorities in this range will be exhausted in priority sequence before the next priority is used. Priorities 51-100 (the "low priority group") are used in round-robin fashion; each of these lists will release its quantum of records, then the next list in the low-priority group will be used. Click **Next**.
16. Click the Sort List check box if you want to sort the fields in the list. Use > and < to select and deselect sort fields. Use **Up** and **Down** to change the order of the **selected** sort fields. Click **Next** to continue.

17. Click **Wizard** if you want to establish release criteria to limit the release of certain records from the list.
  - a. Select a Name/Data Field on which you want to set conditions.
  - b. Select the operator for the condition.
  - c. Type the value of the condition.
  - d. Use **AND** or **OR** to set additional condition. Use the parenthesis buttons to set nested conditions.
  - e. Click **Add**.
  - f. Click **OK** to return to the List wizard.
18. Select the Limit Release check box to enable the limit criteria you defined. Click **Next**.
19. The list you created should be displayed in the window. Note that there are two default lists that are always created automatically when the Campaign Plus Service is created: General and Exceptions. These lists are special purpose lists and can be ignored.
20. If you want to add more new lists, click **New**.
21. When all of the lists have been created, click **Finish** to return to Oracle Integrated Manager.

## 1.6.18 Creating a Oracle Campaign Plus Campaign

Use the following steps to create a Oracle Campaign Plus campaign under the Oracle Campaign Plus Service you just created through Oracle Marketing Online.

### Prerequisites

A Oracle Campaign Plus Service must exist before you can create a campaign under it, and since a Oracle Campaign Plus campaign consists of a group of lists, it is easiest to create all the lists you want in the campaign before you create the Oracle Campaign Plus campaign itself.

### Steps

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.

2. From the Integrated Manager tree view, expand the **Oracle Integrated Manager** node, then expand the **Outbound** node, then click the **Campaign Plus Services** node.
3. Right-click the **Campaigns** node under the Oracle Campaign Plus service for which you want to create a new campaign.
4. From the popup menu select **New**, and then select **Campaign Plus Campaign**.
5. Select **Create a new campaign** and type a descriptive name for the campaign, then click **Next**.
6. Select a dialing method for this campaign from the drop-down list.

**Table 1–4 Dialing Methods**

Type	Definition
Predictive	Uses an algorithm based on call anticipation to set the outbound call rate while screening noncontact outcomes. The answered call and the customer record arrive at the agent's workstation simultaneously. You must have an Oracle Predictive service installed and configured to select this method.
Preview	Allows the agent to review the customer profile before initiating a call.
Progressive	Sends the customer record to the agent application as the customer number is dialed.

7. Select the lists you want to assign to this campaign. Click a list from the Available Lists column and use the right arrow to move it to the Assigned Lists column. Repeat for as many lists you need. Click **Next** to continue.
8. Review the summary page. Use **Back** to change your selections or click **Finish** to create the campaign.
9. From the confirmation dialog box, click **Yes** to create the new campaign.  
Oracle Campaign Plus confirms that the new campaign has been created.
10. Click **OK** to return to Oracle Integrated Manager.

### 1.6.19 Starting the Oracle Predictive Service(s)

Use the following steps to start the service(s) for Oracle Predictive.

#### Steps

1. Click **Start, Settings, Control Panel**.

The Control Panel screen appears.

2. From the Control Panel, double-click **Services**.

The Services screen appears.

3. From the list of services on the Services screen, click the desired Oracle Predictive service.
4. Click **Start**.
5. Click **Close**.

The service starts. The Services screen closes and you return to the Control Panel.

## 1.6.20 Starting the Oracle Campaign Plus Service(s)

Use the following steps to start the service(s) for Oracle Campaign Plus.

### Steps

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.

Oracle Integrated Manager appears on your screen.

2. From the Oracle Integrated Manager tree view, expand the **Oracle Integrated Manager** node, then expand the **Outbound** node, then expand the **Campaign Plus Services** node.
3. From the list of Oracle Campaign Plus services, right-click the desired service name.
4. From the Pop-up menu, click **All Tasks**.
5. From the pop-up menu, click **Start**.

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---

**Note:** You can check the Status column to see if the service has started, or you can check the service status in the Control panel - under Services.

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## 1.6.21 Loading List Records Into a Oracle Campaign Plus Service

Oracle Campaign Plus allows you to easily copy data from the customer database into lists. The customer account number, telephone number, time zone, and phone

type are automatically copied when you load records. When other fields have been defined as part of the Oracle Campaign Plus Service configuration process, Oracle Campaign Plus copies those too.

Records are loaded from the Oracle Marketing tables after Marketing has generated a list for calling.

### **Prerequisites**

You must specify the Oracle Campaign Plus campaign or service into which you want to load records. Oracle Campaign Plus uses the selection criteria defined in the service to place the records into the specified lists.

The Oracle Campaign Plus service must be running to load records.

### **Steps**

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.
2. From Oracle Integrated Manager console tree, right-click the **Campaign Plus Services** node for the Campaign Plus Service into which you want to load records.
3. From the popup menu, select **All Tasks**, then **Load Records**.
4. From the Load Records dialog box, select the name of the source database that will supply customer information to the Oracle Campaign Plus list.
5. Type the database login and password.
6. Click **Load** to start loading records.

## **1.6.22 Setting Filters for Logs**

The filters determine how and when alert messages are tracked and logged for all services and servers. Use this procedure to set the logging filters.

### **Prerequisites**

A service must have been created and exists for Oracle Campaign Plus in Oracle Integrated Manager.

### **Steps**

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.

2. From the Oracle Integrated Manager navigation tree, double-click **Outbound**.
3. Double-click **Campaign Plus Services**.
4. Click the appropriate service.
5. Right-click **Log and Alerts**.
6. Select **All Tasks**.
7. Select **Set Filter**.

The Set Filters for Log/Alerts screen will display. The Set Filters for Log/Alerts screen consists of two types of filter settings: Time Filters and Other Filters.

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**Note:** Log filters apply to all services.

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8. In the Time Filter box, enter the parameters as you want them to apply to the service. You can use the time filters to identify how you want to query the results of the logging activity.
9. If you do not want to set the filtering of logs by time, select the **No Time Filter** option.
10. If you want logs to be shown for a set number of hours, select the **Show Log/Alerts for Last Hours** option.

Select the value from the LOV. You may choose any number of hours between 1 and 24. Beginning with 24 hours, the setting is incremental by 24, up to 72 hours. The default is 24.

Or, if you choose, you can enter the desired number of hours in the **Show Log/Alerts for Last Hours** field.

11. If you want to filter by a date range and time, select the **Show Log/Alerts from and To** option.

Enter the date from which to begin or select the date from the LOV. When you select the LOV, the calendar feature will display for data selection.

Enter the time from which to begin showing logs or select the time. Click the hour and choose the up or down arrows in the field to increase or decrease the time by 1 hour. When you click the minute or second values, you can increase or decrease each by 1 minute or second respectively.

12. In the Other Filters box, enter the parameters as they apply to the filters being defined.

13. You can determine the severity level to be used as a filter. There are 5 levels:

- informational
- trace
- minor
- major
- critical

If you want to filter logs and alerts by severity level, select the Show Log/Alerts with severity level greater than option. Next, select a level from the LOV.

14. You can also filter logs and alerts based on action ID. When the action ID is equal to the selected action, the alert will display and be logged. The filter options are:

- log
- set alert
- clear alert
- clear all

15. If you want to set the filters by action ID, select the Show Log/Alerts with action ID equals to option. Next, select the action from the LOV.

16. The Show Max option is a required field with a default setting of 100. You can modify the number as required. You may enter any number of records from 1 to 1000.

17. Click OK.

### 1.6.23 Activating Alerts

Alert messages for all services are controlled from the Logs and Alerts node in Oracle Integrated Manager. When you activate alert messages, alerts will be monitored and captured for all services. Each alert message will display in a separate window. You also can stop the alerting feature through the Logs and Alerts node. Use this procedure to activate alert messages for all services.

#### **Prerequisites**

A service must have been created and exists for Oracle Campaign Plus in Oracle Integrated Manager.

**Steps**

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, and Administrator MMC Console**.
2. From the Oracle Integrated Manager navigation tree, double-click **Outbound**.
3. Double-click **Campaign Plus Services**.
4. Click the appropriate service.
5. Right-click **Log and Alerts**.
6. Select **All Tasks**.
7. Select **View Alerts**.

---

---

**Note:** When you enable the viewing of alerts, as alert messages are generated, they will display in a separate window for viewing.

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8. Click **OK**.

## 1.6.24 Configuring a TeleSales User for Advanced Outbound

For detailed information on creating an Oracle Application user, please refer to the *Oracle Telephony Manager Implementation Guide* (Creating an Oracle Advanced Inbound User section).

One additional step is necessary for Advanced Outbound -- assigning the outbound campaigns to the TeleSales agent or assigning a campaign to the TeleSales agent.

### 1.6.24.1 Assigning Campaigns to Agents or Assigning Agents to Campaigns

Oracle TeleSales agents need to be identified by their campaign assignment in the call center to accurately define their tasks and responsibilities.

You should ensure that adequate resources are available for the campaign so that the campaign will run smoothly and with a high level of service.

There are two ways to connect a resource with a campaign. You can either assign an Oracle TeleSales agent to the outbound campaign or assign the outbound campaign to an Oracle TeleSales agent.

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**Note:** This step is only performed for those users who are assigned agent responsibility.

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**1.6.24.1.1 Assigning Oracle TeleSales Agents to Outbound Campaigns** Use this method if you have many campaigns that change frequently. This method allows you to add and/or remove agents quickly for these campaigns, and it is a simple way to assign campaigns to agents.

### Steps

1. Login to Oracle Applications with the TeleSales Administrator responsibility and select the Campaign Assignment window.

The Campaign Assignment window appears.

2. From the Campaign Assignment window, click the Resource tab.
3. In the Assign To region of the Resource tabpage, click either the **Resource** or **Resource Group** radio button.
  - Resource - An agent resource
  - Resource Group - A group with multiple agents assigned to it

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**Note:** The resource group should have been previously created in Resource Manager. Click **Search** to find the accurate resource or resource group, and click **Details** to view additional information regarding the individual resource or resource group.

---

---

4. In the Campaign Name field, type the name of the Oracle Marketing Online campaign to which you want to assign the resource. Click **Find** to search for campaigns.
5. The Current Campaign Assignments region contains the following fields:
  - Code - The code for the campaign that is assigned by OMO
  - Type - The type of campaign, such as: inbound, outbound, e-mail, direct marketing, etc.
  - Name - The name of the campaign
6. In the Valid Campaigns region, if you highlight a valid campaign, you can click **Campaign Details** to receive additional description information. The valid

campaigns are displayed for either the resource or the resource group that was selected in the Assign To region of the window.

7. Click **OK** to save the information entered in the window automatically.
8. Click **Close** to close the window.

**1.6.24.1.2 Assigning Outbound Campaigns to Oracle TeleSales Agents** You typically use this tabbed page if you have one or two campaigns that are always running. This is a simple way to assign agents to a campaign.

### Steps

1. Login to Oracle Applications with the TeleSales Administrator responsibility and select the Campaign Assignment window.  
The Campaign Assignment window appears.
2. From the Campaign Assignment window, click the Campaign tab.
3. In the top region of the window, select the name for the campaign. The buttons in this region allow you to:
  - Search - Search for a valid campaign
  - Campaign Details - View the campaign details for the campaign selected in the Name field
4. In the Current Resource Assignments region, click either the **Resource** or **Resource Group** radio button. Click **Find** to search for resources or groups.
5. The Valid Teleagent Resources region provides a view into what agents or agent groups are currently assigned to that campaign. The Valid Teleagent Resources region contains the following fields:
  - Name - The name of the resource or resource group assigned to the campaign
  - Start Date - The date that the resource began working on the campaign.

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---

**Note:** You can click the Resource Details button for additional information about the resource or resource group.

---

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6. The Teleagent Resources Assignments region contains the following fields:

- Name - The name of the campaigns to which the resource or resource group is assigned
  - Start Date - The date that the resource or resource group were assigned to the campaign
7. Click **OK** to automatically save the information entered into the window.
  8. Click **Close** to close the window.

## 1.7 Glossary

**Abandoned Call** - A call in which the caller cancels the call after a connection has been made, but before conversation takes place (for example, after hearing a recorded announcement).

**ACD - Automatic Call Distributor.** ACDs are automated systems that answer calls and attempt to route those calls as quickly as possible to the right person or agent. ACDs are used to uniformly distribute a large volume of incoming calls to a number of operators as soon as they have a free line and are often used by businesses with a large number of incoming calls such as airlines and insurance companies. Sometimes ACDs will prompt you to press a few touch-tone digits so that they can route your call more quickly.

**AI - Oracle Advanced Inbound.**

**ANI - Automatic Number Identification.**

**AO - Oracle Advanced Outbound.**

**AOL - Application Object Library,** a set of core Oracle Apps components.

**API - Application Programming Interface.**

**Automatic Callback** - A feature that enables a user with a busy line to be connected automatically to the called line when it becomes idle.

**CCC - Oracle Call Center Connectors.**

**CRM - Customer Relationship Management.**

**CT - Computer Telephony.** This term refers to technology that applies computer intelligence to making, receiving, and managing telephone calls. CT technology encompasses products such as voice and fax messaging, auto attendants, fax-on-demand, fax servers, and interactive voice response (such as automated order-entry systems). Core technologies include voice recognition, text-to-speech, and more recently, the Internet. In other words, CT systems automatically handle

and process phone calls. These systems often let callers control various aspects of the call using either a touch-tone phone or spoken commands.

**CTI - Computer Telephony Integration.** This term refers to connecting computers (usually LAN-based) to a telephone PBX or switch. With the proper supporting software and hardware, these workstations can then have a screen pop that displays the contact database record of the calling party even before the person at the workstation answers the phone. CTI improves the efficiency of call handling, especially in multi-agent interaction centers.

**Disconnect -** The disassociation or release of a switched circuit between two stations.

**DNIS - Dialed Number Identification Service.**

**eMC - Oracle eMail Center.**

**IB - Oracle Interaction Blending.**

**IH - Oracle Interaction History.**

**IVR - Integrated Voice Response.** A CTI service that allows callers to receive information via audiotex or TTS, based on touch-tone or ASR input. IVR can be used for both inquiry and update-oriented transactions.

**lcd file - Local Call Data file.** Oracle Predictive uses the LCD file to determine the digit string needed to properly dial a call.

**Lost Call -** A call that has not been completed for any reason other than cases where the called party is busy.

**OMO - Oracle Marketing Online.**

**OTM - Oracle Telephony Manager.**

**PBX - Private Branch eXchange.** A private internal phone system that services a number of extensions. A PBX is invariably connected to an external public telephone system.

**Switch -** A piece of equipment that establishes and routes communication paths between separate extensions.

**Unsuccessful Call -** A call attempt that does not result in the establishment of a connection.

**UWQ - Universal Work Queue.**

## 1.8 Documentation and Other Resources

Documentation for Oracle Applications is available in Adobe Acrobat® format. You may view the documentation as created using the Adobe Acrobat viewer, which is available free of charge directly from Adobe Corporation. You may also purchase printed, perfect-bound versions of the documentation online via the Oracle Store. The documentation on this CD was current as of January, 2001. It is advisable to check MetaLink for any new or updated documentation.

### **Related Oracle Documentation**

- *Oracle Applications, Concepts*
- *Oracle Applications, Implementing CRM Applications*
- *Oracle Call Center Applications Setup*
- *Oracle Campaign Plus Installation Guide*
- *Oracle Predictive Installation Guide*
- *Oracle Advanced Inbound Implementation Guide*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle Marketing Online Installation Guide*
- *Oracle Marketing Online Implementation Guide*
- *Oracle Marketing Online Concepts and Procedures*

### **Other Oracle Resources**

<http://metalink.us.oracle.com/>

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# Oracle Campaign Plus Calendar Files

Campaign Plus uses calendars for two purposes:

- A list calendar establishes the times of day during which a list is eligible to release records.
- A service calendar identifies the operating hours of a complete Campaign Plus service and therefore often has longer operating hours than a list calendar.

The calendars are formatted identically. Common operating hours for an East Coast U.S. interaction center, working a nationwide campaign, could run from 8:00 AM to Midnight, eastern time - with only Central, Mountain and Pacific timezone calls being placed after 9:00 PM eastern time, each governed by the appropriate list calendars.

There can be several intervals in a day, if desired; for example, a calendar can open a list at 8:00 AM, close it at 10:00 AM, reopen it at 6:00 PM, and close it at 9:00 PM.

Calendars also include a timezone property which allows an administrator to specify Start Time and End Time in local values, and allows Campaign Plus recycling to schedule callbacks at suitable times in the callee's local time zone. Ordinarily, therefore, all calendars share the same basic operating hours, and simply indicate a different timezone. Campaign Plus then does the math; the administrator does not have to add or subtract hours to compensate for time zone shifts.

Calendars can also reference other calendars. For example, there is usually a single "base" calendar which defines the operating hours of each list in the list's local time; individual timezone calendars then reference the "base" calendar and simply specify deviations, such as identifying the timezone.

Two special calendars also exist: holiday and DST calendars. Each provides definitions for special events... the holiday calendar defines the dates of common holidays for several years, while the DST calendar defines the start and end dates

for daylight savings time. These calendars are referenced by base calendars; they cannot serve as base calendars themselves. The supplied versions are called "holidays.cal" and "dst.cal".

## A.1 To Edit an Existing Calendar

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, Administrator MMC Console**.
2. Expand the **Oracle Integrated Manager** node, expand the **Outbound** node, then expand the **Campaign Plus Services** node.

A list of Campaign Plus Services appears.

3. From the list of Campaign Plus Services, select the Campaign Plus service for which you want to modify a calendar, then select **Calendars** and click the desired calendar.

The contents of the calendar appear in the Results area of Integrated Manager; the text editor behaves like Notepad.

## A.2 To Create a New Calendar

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, Administrator MMC Console**.
2. Expand the **Oracle Integrated Manager** node, expand the **Outbound** node, then expand the **Campaign Plus Services** node.
3. From the list of Campaign Plus Services, select the Campaign Plus service for which you want to create a calendar, then right-click **Calendars** and click **New**.
4. Enter a name and description for the calendar. The highly-recommended approach is to cut-and-paste a similar calendar, then edit the changes you want.

Calendars are stored in the database by Oracle Integrated Manager. Some additional calendars, which may be used as the basis for your own calendars, are also shipped as files in the \Oracle\OracleCampaignPlus\calendar directory on Campaign Plus server machines; these can be read with Notepad, and cut-and-pasted into new calendars in Oracle Integrated Manager.

## A.3 Base Calendar Sample

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**Note:** Lines beginning with ! are comments and are ignored.

---

---

```
! -----
-!
! CALENDAR NAME: SAMPLE_BASE.CAL
! PURPOSE: SUPPORT RESIDENTIAL CALLING--NOTE "WORK_WEEK"
! SCHEDULE = PRIME TIME
! DATE: OCT 12, 1995
! AUTHOR: DOUG MASS
! MODIFIED: JAN 23, 2001: DAN BRIGHAM - CHANGE "WORK_WEEK"
! SCHEDULE
! -----
-!
version          : 1
locale           : US
begin_date       : "JAN-1-1998"
end_date         : "DEC-31-2003"
base             : NULL
holidays         : HOLIDAYS.CAL
dst_file         : DST.CAL
dst_flag         : YES
server_dst_flag  : YES
server_time_zone : 2
time_zone        : 2
!
schedule         : WORK_WEEK is "0800-1000","1800-2300"
```

```
schedule    : SATURDAY is "0900-2300"
schedule    : SUNDAY  is "1200-2300"
!
work        : DAYS MONDAY,TUESDAY,WEDNESDAY,THURSDAY,FRIDAY
use WORK_WEEK
work        : DAYS SATURDAY use SATURDAY
work        : DAYS SUNDAY use SUNDAY
work        : HOLIDAYS THANKSGIVING use SUNDAY
!
non_work    : HOLIDAYS NEW_YEARS, MEMORIAL_DAY, INDEPENDENCE
non_work    : HOLIDAYS LABOR_DAY, CHRISTMAS
non_work    : DATES "MAR-29-2001","SEP-9-2001"
!
! --- END ---
```

## A.4 Time Zone Specific Calendar Example

```
-----!
! CALENDAR NAME: PACIFIC.CAL
! DATE: JAN 18, 1995
! AUTHOR: DOUG MASS
! -----
-!
version     : 1
base        : OTS_CALENDAR:OTS_BASE.CAL
! Note the time_zone value differs by 3 hours from the time_zone in the base
calendar
time_zone   : 5
! ... and the schedule for the list represents the calling times allowed in the time
zone
```

schedule : LIST\_OPEN is "0900-2100"

!

work : DAYS

MONDAY,TUESDAY,WEDNESDAY,THURSDAY,FRIDAY,SATURDAY,SUNDAY

use LIST\_OPEN

!

! --- END ---



---

---

## Oracle Campaign Plus Recycling

Campaign Plus has a recycling feature that comprises rules regarding the reattempting of leads. Each Campaign Plus service is assigned a recycling algorithm. The recycling algorithm rules determine how incomplete contact attempts should be processed. Processing rules include the reattempting of contact at a specific date and time, as well as limiting the number of subsequent reattempts that are made.

### B.1 The Recycling Algorithm

The recycling algorithm is defined and stored in the CRM database. Several recycling algorithms are supplied as part of the Oracle Campaign Plus installation.

You should copy the appropriate supplied algorithm and use the Oracle Integrated Manager text editing utility to edit and modify it as needed.

### B.2 Determining Recycling Business Requirements

Oracle Campaign Plus keeps track of the number of call attempts and the outcome (busy, no answer, contact, and so on.) of the call attempts which the recycling algorithm uses to determine how a lead should be handled.

Calling campaigns may have different recycling requirements (for example, business versus residential, and progressive versus predictive).

Recycling business requirements include how many call attempts are allowed, the time of day, and when to schedule the next call attempt.

## B.3 Recycling Algorithm Rules

Each recycling algorithm follows the business rules of the algorithm and uses a 24-hour clock to set call times. Rules consist of Boolean statements that use the call attempt history to determine the disposition of the list record after each call attempt.

Results of recycling decisions can include assigning a lead to a different list, assigning a date and time for the next call attempt, or dropping a lead from the lists, due to call attempt total.

## B.4 Recycling Algorithm Sample Code

```
! Assign the record to the Default Recycling list if
! the instructions below cannot find the OUTCOME code.
!
list_assign
!
! If call attempts exceed the maximum number that the
! call center wants to make, put the record in
!"NoContact" to quit calling it, then exit the
!recycling instructions.
!
if ch$count > 8
    list_assign "NoContact"
    exit
end_if
! BUSY = 2
!NOTE: Many consecutive busy signals might suggest the
!number will be busy for a long time (modem call?).
!
if ch$call_outcome_code[1] = 2
```

```

!
! ASSIGN A TIME STAMP
!   if ch$call_outcome_consecutive <= 3
      dt_assign plus 0:15
    else_if ch$call_outcome_consecutive = 4
      dt_assign plus 1:00
    else_if ch$call_outcome_consecutive >= 5
! ASSIGN FOR THE SAME TIME TOMORROW
      dt_assign tomorrow
    end_if
! All other outcomes, assign for 3 hours from now
else
      dt_assign plus 3:00
end_if

```

## B.5 Opening a Recycling Algorithm

1. From the Windows Start menu, click **Programs, Oracle, Integrated Manager, Administrator MMS Console**.
2. From the Integrated Manager tree view, expand the **Outbound** node, then expand the **Campaign Plus Services** node.
3. Select a Campaign Plus Service, then select Recycling Algorithms.

The Recycling Algorithms feature displays a list of existing recycling algorithms in the database. The recycling text is shown in the Results region.

---



---

**Note:** Any recycling algorithm you see in Oracle Integrated Manager can be shared by one or many Campaign Plus services. The list of recycling algorithms is common to all Campaign Plus services, so changes you make to an algorithm can affect other campaigns. If you are not sure, save the algorithm with a new name.

---



---

## B.6 Outcome Codes

An outcome code is generated by the dialing software or the business application (e.g. Oracle TeleSales) for each call attempt, and is returned to Campaign Plus with the record for recycling. Outcome codes can be used by Campaign Plus in recycling algorithms, and are recorded in Interaction History with call attempts.

The outcome codes (and other data) for the most recent 20 call attempts, per customer ID, are also recorded internally by Campaign Plus to facilitate some recycling decisions (such as, "drop the record if there have been 15 or more attempts" or "schedule the record for callback in 5 minutes if this is the first or second consecutive busy signal, an hour from now if this is the third through fifth consecutive busy, or two hours from now otherwise").

Following are the predefined outcome codes. Only those marked with an asterisk may be generated by dialing software, including Oracle Predictive. The other outcome codes may be generated by the business application -- they require information that is not available to the dialer (for example, the person you were trying to reach was not available, but the phone was answered by someone).

Campaign Plus is responsible for recording, in Interaction History, incomplete call attempts made by Predictive (that is, call attempts that were never transferred to an agent); the agent's business application, or other components, are responsible for recording all others, with any other data resulting from the call (e.g., sales made).

**Table B-1 Outcome codes and their numerical values**

<b>Outcome Code</b>	<b>Corresponding Numerical Value</b>
Unknown Outcome	0
No Answer	1
Busy	2
Wrong Number	3
Not Available	4
Priority Callback	5
Change Number	6
Bypass/Maintenance	7
Deleted	8
Not Set	10
Requeued by Campaign Plus	11

**Table B–1 Outcome codes and their numerical values**

<b>Outcome Code</b>	<b>Corresponding Numerical Value</b>
Inbound Contact	13
SIT Busy Tone	30
SIT Operator Intercept	31
SIT Reorder (“number has been changed to...”)	32
SIT Disconnect	33
Answering Machine	34
Customer Abandoned (e.g. hung up while call was being transferred to an agent)	35
Modem Tone	36
SIT Tone (general)	37
Fax Tone	38
Withdrawn From Network	40
Withdrawn While Phone Ringing	41
Front Hold Messaging Predictive Hangup	42
Front Hold Messaging Customer Hangup	43
Flunked Stolist	98
Record retained by desktop app for direct callback (e.g. "personal callback")	99
Contact	128

If a Campaign Plus list is configured for the Quota release strategy, calls with outcome codes less than 100 are considered "unsuccessful calls" and are not counted against the list's quota.

