Oracle® CRM Application Foundation

Implementation Guide

Release 11*i*

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Oracle CRM Application Foundation Implementation Guide, Release 11*i*

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Preface

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

This CRM Application Foundation Implementation Guide provides information and instructions to help you effectively set up the Oracle CRM Foundation modules.

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

Intended Audience

This guide is aimed at the following users:

- Oracle CRM business users
- Customer Service Representatives
- Field Service personnel
- System Administrators

This guide assumes that you have the following prerequisites:

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

This guide is aimed at the following users:

- Technical Service Representatives
- Customer Service Representatives

- System Administrators, Database Administrators, and others with similar responsibility.

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 and Developer/2000
- Background in SQL, PL/SQL, SQL* Plus programming

Structure

This manual is a compilation of the implementation topics in the online help for Oracle CRM Application Foundation components. It provides general descriptions of the setup and configuration tasks required to implement the Oracle CRM Application Foundation components successfully.

Related Documents

For more information on Oracle CRM Application Foundation, see the following manuals:

- *Oracle CRM Foundation Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

Other Sources of Information

For additional information regarding the Oracle E-Business Suite, consult the following:

- *Oracle Application Product Update Notes, Release 11*
- *Installing Oracle Applications, Release 11*
- *Maintaining Oracle Applications, Release 11*
- *Oracle Application Concepts*
- *Oracle Applications System Administrator's Guide*
- *Implementing Oracle CRM: ERP Functional Flows*
- *Implementing Oracle CRM: Foundation Functional Flows*

In addition, Oracle offers several relevant courses through Oracle University:

- 11*i* Use and Administer Oracle CRM Foundation
- 11*i* Implement Oracle CRM Foundation

Documentation Accessibility

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

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Implementing Territory Manager

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully.

This section covers the following topics:

Related Documentation and Resources

You may also want to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

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Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process
Implementing CRM Applications, A853401-01	Contains post-installation information on various CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- 11i Overview of Implementing Foundation, Course Description ID 8831.

Setting Up Territory Manager

Prior to using Territory Manager, you must set up and configure a number of items including, territory types and the specific territories.

Prerequisites

None

Steps

Perform the steps following to set up the Territory Manager.

Step	Required?	Action	Window Name(s)
1	Yes	Territory Planning is the first step in the Territory Manager process. Typically, a planning team analyzes the territory setup in the organization.	n/a
2	Yes	Enable existing Transaction Qualifiers first before using them.	Setup Qualifier Window

Territory Planning

Before using the Territory Manager module, you must analyze the territory setup in your organization. This is typically done by a planning team comprised of but not limited to: management, consultants, and other key players. You need enterprise-wide cooperation and feedback and you must expect to make multiple territory revisions in the first months of operation as your enterprise discovers omitted information or territories that do not work on a day-to-day basis.

Note: Remember that Oracle Sales and Oracle Telesales use the same rules for assigning leads or opportunities.

The following are the typical steps to follow in the planning process.

Steps

1. Review your existing territories.

   You need the following types of information:

   - How your territories are currently assigned (by state, by industry, by zip code, by account, and so on)
   - The names and current territory assignments for your sales or service personnel
   - The names of employees in other organizations who receive account, lead, and opportunity information and how that information is accessed and used
   - Your products and how they are differentiated

2. Decide what qualifiers you want to use to assign to territories and create territory types (optional) to restrict your territory restrictions.
3. Decide on the hierarchy of territories.
4. Decide if escalation territories are needed and how they fit in the hierarchy.
5. Decide what qualifier values to use for assigning territories.
6. Identify any overlapping territories and decide the order in which the application chooses them.

- Rank any overlapping territories from 1 to n to determine the order. A territory with a smaller rank wins over a territory with a higher rank. In case of a tie, the assignment is made randomly.

7. Test the strategy before implementing territories throughout the company and consider any future territory maintenance efforts.

> **Note:** Remember that the first territory setup is not necessarily the one that works best. You achieve optimum territory definition only gradually after much fine-tuning to accommodate user reactions and various interests in your organization.

In general, there is no limitation on territory creation. Create as many territories as you want for your business. However, in considering the purpose of future territory maintenance, for example, you need to modify territories due to sales, service, or support people changes or relocations, as well as organizational changes. You need to have a reasonable size of territories to minimize the efforts of territory management.

Enabling Existing Qualifiers

Territory Manager has predefined qualifiers for:

- Defect Management
- Sales and Marketing
- Service
- Service Contracts
- Trade Management

Before using any of the transaction qualifier, you need to enable them.

Unlike the transaction qualifiers classified by the territory usage, resource qualifiers are shared throughout the application regardless of territory usage except for Service Contracts. Therefore, you do not need to enable them.

Perform the following steps to enable the existing transaction qualifiers.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Territory Manager > Territory Administration**.

   The Navigator window opens.

2. Select **Administration** from the drop down menu and choose **Setup Qualifiers**.

   The Setup Qualifier window opens.

3. Select the Usage drop-down list.

   The Select Usage window opens.

4. Highlight your selection and click **OK.**

   The Setup Qualifier window opens and the Usage Field is populated with your selection.

5. Select **Find**.

   You can also select appropriate qualifier status (Enabled, Disabled or All) before finding them. Note that all resource qualifiers are not listed here.

6. Check (or uncheck) the targeted qualifiers and select **Update Qualifiers.**

Detailed information on how to enable existing qualifiers is addressed in the 11i Implement CRM Foundation course.

See Also

- Qualifiers
- List of Predefined Territory Qualifiers

Implementing Resource Manager

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully. This section covers the following topics:

- Related Documentation and Resources
- Setting up Resource Manager
- Defining Role Types
- Defining Resource Roles
- Setting Profile Options
- Workflows in Resource Manager

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components, Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

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Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Setting Up Resource Manager

In addition to the pre-defined Role Types and Role Information, you can define new Role Types and Roles. The following tables outlines the steps involved in setting up the Resource Manager.

Steps

Step Number	Required?	Resource Manager Setup Step Description	Window Name(s)	AIW Reference
❑ 1	Optional	Define Role Types	Application Object Library: JTF_RS_ROLE_TYPE Lookups	N / A
❑ 2	Optional	Define Resource Roles	Roles	N / A

Defining Role Types

A Role Type is a category of roles associated with a particular CRM module. Resource Manager is delivered with pre-defined Role Types for all CRM modules. Perform the following steps to define additional custom Role Types for your enterprise. Make sure that a role type exists with which you can associate the new role.

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Setup > Role Types**.

The Application Object Library: JTF_RS_ROLE_TYPES Lookups window displays existing Role Types.

2. Use the down arrow to scroll to the bottom of the list of Role Types.
3. Select the last entry in the record and choose **File > New** to add a blank field.
4. Enter the name of the new Role Type in the blank field at the bottom of the list.
5. In the Meaning field, enter the CRM module for which this Role Type is created.
6. Choose **File > Save** to complete the Role Type definition.

Defining Resource Roles

A Role may encompass one or more job descriptions and job titles. Use Roles to assign responsibilities to resources, resource groups and resource teams. Resource Manager is delivered with pre-defined Roles for all CRM modules. Perform the following steps to define additional custom Roles for your enterprise.

Prerequisites

Make sure that a Role Type exists with which you can associate the new Role.

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Setup > Roles**.

   The Roles window opens and displays fields you can use to define a role.
2. Enter your values in the Code and Name fields. Choose a Role Type from the list of values (LOV).
3. Select the Active box to make the Role active. Select one or more of the role attribute check boxes–**Member**, **Lead**, **Admin**, **Manager**–to associate the Role to a responsibility. See the Resource Roles Attributes table in the References section for descriptions of these role attributes.
4. Use one or more Job names in the job region to describe jobs associated with the Role.
5. Select **File > Save** to complete the Role definition.

   The new role name registers in the Role Name field in Resource Manager.

Guidelines

Resource Role Attributes

Check Box	Action
Member	This check box identifies the role name as a member of the role.
Lead	This check box identifies the role name as a lead for the role.
Active	This check box identifies the role as active.
Admin	This check box identifies the role as administrative.
Manager	This check box identifies the role as managerial.
Seeded (Read Only)	This check box identifies the role as seeded.

See Also

Defining Dynamic Groups

Defining Dynamic Groups

Determine the group values available to the user in Resource Manager. By defining the name, usage values, and effective dates of a group. Perform the following steps to define a dynamic group.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Dynamic Groups**.

   The Dynamic Groups window opens.

2. Enter a group name in the Name field.
3. Select a group usage from the Usage field.
4. Select the effective dates for the group from the list of values (LOV) in the Start and End fields.
5. Enter a brief description of the group name and usage in the Description field.
6. Enter the SQL statement to define a group.

7. Click **Check Syntax** to check the code for syntax errors.
8. Choose **File > Save** to save the group.

   The new group name registers in the Group Name field in Resource Manager.

See Also

Defining Resource Roles

Setting Profile Options

Resource Manager does not use profile options.

Workflows in Resource Manager

Resource Manager does not use Workflow processes manager.

Implementing Notes

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully. This section covers the following topics:

- Related Documentation and Resources
- Post-Installation Set Up Tasks for Oracle Notes
- Setting Up Note Types
- Defining Note Types
- Mapping Note Types To a Source
- Setting Up the Source Object Code and Context
- System Profile Options

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation* Components *Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

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Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Related Courseware

The following Net Class is available on demand through Oracle University.

- *11i Overview of Implementing Foundation*, Course Description ID 8831.

Post-Installation Set Up Tasks for Oracle Notes

After the Foundation modules have been installed, you may perform the following optional tasks listed in the table below.

Step Number	Required?	Oracle Notes Setup Step Description	Window Name(s)
❑ 1	Optional	Set Up Note Types	Notes Setup > Note Type Lookups
❑ 2	Optional	Map Note Types to a Source	Notes Setup > Source and Note Type Mapping
❑ 3	Optional	Set Up the Source Object Code	Task and Escalation Manager > Setup

Setting Up Note Types

Notes comes with a set of predefined note types. You can create additional customized note types. You may also choose to not use the predefined note types Perform the following steps to create new note types.

Note: To delete an existing note type, assign an end date to that note type.

Prerequisite

You must log on under the CRM Administrator account to perform this task.

Steps

1. Select CRM Administrator from the list of logon responsibilities.

   The CRM Administrator Navigator opens.

2. Expand the Notes Setup node.

3. Select Note Type Setup

   The Application Object Library: Note Type Lookups form window opens.

4. Define the code, meaning, and description as desired.

   You only need to define a tag for a new, customized note type.

5. Save this record when you have finished.

Defining Note Types

You can configure Notes to limit the choices of task type. When you provide a LOV for the Note Type fields, the note creator cannot enter an incorrect value, Instead, the user chooses from a pre-defined menu of note types. Use this procedure to define note types for your users.

Prerequisites

None

Steps

1. On the application menu bar, click **File** and select **Switch Responsibility**.

   The Responsibilities window opens.

2. Scroll to select Application Developer and click **OK**.

   The Navigator - Application Developer window opens.

3. In the Functions tab, double-click Application to expand the node.

4. Double-click Lookups to expand the node.
5. Select Common and click **Open**.

   The Application Utilities Lookups window opens.
6. On the application menu bar, click **View**, point to Query by Example, and click **Enter**.
7. In the Type field, enter **JTF_NOTE_TYPE**.
8. On the application menu bar, click **View**, point to Query by Example, and click **Run**.

   The application populates the window with existing type code information.
9. Scroll down and select the last record in the multi-record block.
10. Define and enter the code, meaning, description, and effective dates.
11. Save your record.

    The new note type registers in the LOV for the note type field in the application.

Guidelines

Choose to enable note types by selecting Enabled for the corresponding note type row. Initially you can create the complete set of note types, and enable the specific types as desired.

Mapping Note Types To a Source

When you may map a note type to a source object, you limit the visible note types for that source to the defined subset of note types. Perform the following steps to map note types to source code.

Prerequisite

You must log on under the CRM Administrator account to perform this task.

Steps

1. Select CRM Administrator from the list of logon responsibilities.

   The CRM Administrator Navigator opens.
2. Expand the Notes Setup node.
3. Select Source and Note Type Mapping.

The Source to Type Mappings form window opens.

4. Select a source to map from the Source LOV.
5. Select a note type to map to it from the Note Type LOV.
6. Save this record when you have finished.

Setting Up the Source Object Code and Context

Notes provides predefined documents or source objects. When you define a new document, you must associate Notes usage to the new document. On the Notes form, the document name appears in the Source list. Each item in the Source list has an associated context, which appears in the Related To list.

Perform the following steps to define the source code usage as NOTES.

Prerequisite

You must log on under the CRM Administrator account to perform this task.

Steps

1. Select CRM Administrator from the list of logon responsibilities.

   The CRM Administrator Navigator opens.

2. Expand the Task and Escalation Manager node.
3. Expand the Setup node.
4. Double-click Objects Meta-data.

   The Tasks Setup: Object Type form window opens.

5. Perform one of the following tasks:

   a. If the source object code you want to seed already exists, then define the usage as NOTES.

   b. If the source object code is not defined, then you must define the source object code, the name, and select its details and usage. (Usage should be NOTES.)

6. Save this record when you have finished.

System Profile Options

Use the following list to identify the profile option(s) that you need to set for your specific implementation. You can set these profile options in any order you like.

- Notes: Default Note Status

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option Notes: Default Note Status

The following table details the profile option, which sets the default note status.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X	X	X	X

Setting	Description and Usage Considerations
User chosen	Chose the default note status from the provided LOV.

Implementing Calendar

This topic group provides general descriptions of the set up and configuration tasks required to implement the application successfully. This section covers the following topics:

- Related Documentation and Resources
- System Profile Options
- Defining a Calendar

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

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System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these options in any sequence.

- JTF_CAL_ACCESS_ALL_CALENDARS

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option JTF_CAL_ACCESS_ALL_CALENDARS

The following table details JTF_CAL_ACCESS_ALL_CALENDARS, which is set to provide access to other Resources' calendars.

Required	User can		Admin Setting Levels			
	View	Update	User	Responsibility	Application	Site
X	X	X	X	X	X	X

Setting	Description and Usage Considerations
Y / N	Default is No.

Defining a Calendar

See the following procedures for defining and maintaining calendars:

- Defining the Calendar
- Defining Availability (of resources)

- Defining Non-availability
- Assigning a Resource to a Calendar
- Assigning a Calendar to a Shift
- Assigning a Calendar to an Exception
- Viewing the Datebook

Implementing Task Manager

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully. This section covers the following topics:

- Dependencies for Tasks
- Related Documentation and Resources
- Setting Up Oracle Tasks
- Defining Task Status
- Determining Task Priority
- Defining Task Types
- Defining a Status Transition and Assigning Rules
- Designing Task Templates
- Workflows

Dependencies for Tasks

The following Foundation modules must be implemented before implementing Oracle Tasks:

- Resource Manager
- Territory Manager
- Calendar

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Oracle Workflow Guide*

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Setting Up Oracle Tasks

Oracle Tasks comes ready to use out-of-the-box, with a number of functions pre-defined for you. However, if desired, you can easily customize Oracle Tasks to meet your business needs.

Prerequisites

First install Oracle Tasks.

Steps

Perform the following tasks, listed in the following table, to customize Oracle Tasks for your specific needs.

Step	Required?	Action	Window Name(s)
1	Optional	Create new Task Statuses if you want to customize task statuses. See Defining Task Status for details.	Define Task Status
2	Optional	Create new Task Priorities if you want to customize task priorities. See Determining Task Priority for details.	Define Task Priorities
3	Optional	Create new Task Types if you want to customize task types. See Defining a Task Type for details.	Define Task Types
4	Optional	Use the status transition model to restrict the status assigned to a task depending on the responsibility. Set up the state transition model for each responsibility.	Define Task Statuses, click **Define Transition**
5	Optional	Create new task date types. The task data model provides three pre-defined date types: ■ Planned ■ Scheduled ■ Actual However, depending on the usage, additional dates can be required. For example, if a lead requires a follow-up date, you might set up a Follow-up Date type.	Define Date Types
6	Optional	Use templates if the same set of tasks are created repeatedly. See Designing Task Templates for details.	Define Templates

Defining Task Status

Limit the user's choices of task status by defining the list of status options and determining the employee type that has access to each status type. When you provide a LOV for the Task Status field, task creators choose from a pre-defined template of status options. Use this procedure to define types of task status for your users.

Prerequisites

None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.
2. In the Task Manager Navigator, double-click Setup to expand the node.
3. Select Task Status and click **Open**.

   The Task Status window opens.
4. Define a type name and enter it in the Status field.
5. Enter a brief description of the status type in the Description field.
6. Enter the effective dates in the From and To fields.
7. Select task status flags.

   For a detailed description of flag options, see the Task Status Flag Definitions table in the References section.
8. Optionally, define transition values that determine the user privilege for each status type.

   Use this procedure to define transition values.

   a. Click **State Transition**.

      The State Transition window opens.

   b. In the Rules tab, enter a name for the user privilege relationship in the Rule Name field.

   c. Enter an initial and final status type for the user.

      Use the initial and final status values to determine the user's range for selecting task status.

   d. In the Responsibility tab, enter the pre-determined rule name.

   e. Enter a user type in Responsibility Name field and click **OK**.

      A transition value stipulating user status privilege now exists.
9. Save your task status type.

   The new task status and corresponding privileges register as lists of values for their fields in the application.

References

The following table defines each task status flag.

Task Status Flag Definitions

Flag	Definition
Assigned	Assigned to an individual
Working	In progress
Schedulable	Scheduled or re-schedulable
Accepted	Accepted by owner
Rejected	Rejected by owner
On Hold	Temporarily not active
Approved	Approved by management
Completed	Completed by owner
Cancelled	Cancelled by owner, creator, or management
Delete Allowed	Delete acceptable without cancellation
Closed	Completed and closed
Seeded	Pre-defined task status

See also

Defining a Status Transition and Assigning Rules

Determining Task Priority

Determine task priority by choosing terms for varying levels of priority and setting an importance rating that corresponds with each term. Use this procedure to determine task priority for your users.

Prerequisites

None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.
2. In the Task Manager Navigator, double-click Setup to expand the node.

3. Select Task Priority and click **OK**.

   The Task Priority window opens.

4. Define a name and enter it in the Priority field.

5. Enter a numerical value in the Importance field.

   Choose an importance value from a larger defined scale of priority.

6. Enter a brief description of the priority value.

7. Enter the effective dates in the From and To fields.

8. Select Seeded to restrict the edit of task priority from future users.

9. Save your task type.

   The new task priority registers as a lists of value for the Priority field in the application.

Defining Task Types

You can configure Task Manager to limit the user's selection of task types. When you provide a LOV for the Task Type field, the task creators cannot enter an incorrect value. Instead they choose from a pre-defined menu of task options. Use this procedure to define task types.

Prerequisites

None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.

2. In the Task Manager Navigator, double-click Setup to expand the node.

3. Select Task Types and click **OK**.

   The Task Types window opens.

4. Define a name and enter it in the Type field.

5. Select from the LOV in the Workflow field.

   The corresponding workflow path information populates the Task Workflow and Description fields.

6. Enter the effective dates in the From and To fields.

7. Enter a unit of measurement for effort in the UOM field.

   Use a measure of time to determine the UOM value.

8. Enter a number for the quantity of effort in the Qty field.

9. Select task type flags.

   For a detailed description of flag options, see the Task Type Flag Definitions table in the References section.

10. If you want to define resource requirements from the Task Types window, then use this procedure.

    a. Click **Resource Requirement**.

       The Resource Requirements window opens.

    b. Enter a resource name in the Name field.

    c. Enter a number in the Required Units field.

       Selecting the Enabled Flag activates the resource type for the corresponding task type.

    d. Click **OK**.

       The complete set of resource types now exists and register as lists of values for their task types when enabled.

11. Save your task type.

    The new task type and corresponding resource types register as lists of values for their fields in the application.

References

The following table defines each task type flag.

Task Type Flag Definitions

Flag	Definition/Action
Notification	Launch notification workflow automatically.
Schedulable	Reserve the resource via the Scheduler.
Billable	Signify a task as a service that requires billing.
Private	Restrict task availability.
Seeded	Lock edit of task type from future users.

Defining a Status Transition and Assigning Rules

In Tasks, you can define a group of tasks that must be performed and impose a sequence of statuses to the tasks. A status transition is the imposed sequence of statuses.

For example, one status transition may dictate the following status sequence:

- Open
- Assigned
- Working
- Closed

As each status in the sequence is completed, the subsequent status appears on the agent's list.

In addition, you can define rules for each status transition. A status transition rule defines access and read-write privileges for the status transition. Rules can be associated to responsibilities, so that a manager may have more privileges than an agent.

Use the following procedure to define a status transition and assign it to a responsibility.

Prerequisites

Responsibilities must be created for the applications to which you are assigning Task Status and Task Status Transitions.

Steps

1. Login to the CRM Administrator responsibility.
2. Navigate to **Task Manager > Setup > Task Status**.

   The Task Status window opens.
3. Click **Define Transition**.

   The Status Transition window opens.
4. Click the Rules tab and click the Rule Name field.
5. Select **View > Find All** to populate the Rules tab.

The Rules tab displays two lists: Current State and Next State. On any line, the task in the Next State list defines the task that immediately follows the task in the Current State list. Use this window to define the sequence of tasks in a rule.

6. To define a new rule, enter a value in the Rule Name field.
7. Click the Responsibilities tab to assign a Rule to a Responsibility.
8. Click **OK** to complete the association of rule to responsibility.

Designing Task Templates

Design a task template to assist the application user in creating tasks. Creating a template eliminates the user's interaction with the specific properties of a task and makes task creation a simple and quick process when creating redundant task types. Use this procedure to design task templates.

Prerequisites

None

Steps

1. In the Tasks window, click **Navigator** on the Task toolbar.
2. In the Task Manager Navigator, double-click Tasks to expand the node.
3. Select Task Template Group and click **OK**.

   The Task Template Group window opens.
4. Define and enter a template group name, description and effective dates.
5. Enter a document type by selecting from the LOV.
6. Define and enter a template name, number, and description.
7. Select from the LOV in the Type, Status, and Priority fields.
8. Activate alarm and notification functions, and enter duration and planned effort values.
9. Select flags.
10. Optionally, click **Dependencies** and **Recurrences**.

    The Task Details window opens.
11. Save your template.

A task template now exists and task creation from a template is possible.

Guidelines

Create task templates within groups. Each task template group contains related task templates with full property descriptions.

References

Linking Tasks to Source Documentation

Defining Task Type

Defining Task Status

Determining Task Priority

Setting Task Flags

Setting Dependencies for Tasks

Assigning and Scheduling Resources

Creating and Updating Tasks

System Profile Options

Task Manager does not use profile options.

Workflows

Oracle Tasks contains one pre-defined workflow:

- JTFTASK

This workflow can only send notifications to resources the resouce category Employee. It will not send any notofication to any other type of resources like such as groups or teams. If you want to send notifications to other type of resources, you have to write your own workflow. JTFTASK is automatically launched under the following circumstances.

- If the auto-notification flag for the task type is set to Y (Yes).
- If certain pre-defined conditions are met.

Implementing Interaction History

This topic group provides general descriptions of the set up and configuration tasks required to implement the application successfully.

The topics covered in this group include:

- Release Dependencies
- Related Documentation and Resources
- Setting Up Interaction History
- Troubleshooting Implementing of Interaction History
- Setting Up Profile Options
- Workflows in Interaction History

Release Dependencies

Before Interaction History is installed, these items must be installed and stable:

- Oracle CRM Foundation (JTF) Resource
- JTF Tasks
- Oracle Accounts Receivable / Technical Community Architecture (AR / TCA) Customer Model
- Oracle Automated Marketing Services (AMS) Campaigns

Implementation of Interaction History starts with:

- The graphical user interface, either Forms or JSP versions
- Interaction History Administration, either Forms or JSP versions, or public APIs

Interaction History interacts with JTF Resource; JTF Tasks; AR/TCA Customer Model; AMS Campaigns.

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Setting Up Interaction History

Overview

Interaction History is a collection of tables and business logic that records touch points between customers and resources for Oracle Applications. Whether the touch point occurs between two computers, a face-to-face conversation, or over various media channels (such as telephony), the following patterns are true:

- A touch point is recorded as an interaction

- An interaction is composed of a set of one or more business activities
- An interaction is historical record, once created it cannot be altered or modified
- Business activities can be related to a media item (such as phone, e-mail, or fax)

Prerequisites

Interaction History is part of the Oracle CRM Application Foundation product suite. After CRM Application Foundation is installed, clients can access the Interaction History graphical interface, Administration, and public APIs to test and use Interaction History functionality.

The following table defines the procedure for setting up Interaction History.

Steps

Step Number	Required?	Interaction History Setup Step Description	Window Name(s)	AIW Reference
1	Optional	Define additional Outcome Codes required by the application in addition to the initial seeded values. Modify or delete existing Outcome Codes.	Outcomes Tab	CRM Administrator Interaction History Administrator
2	Optional	Define additional Result Codes required by the application in addition to the initial seeded values. Modify or delete existing Result codes.	Result Tab	CRM Administrator Interaction History Administrator
3	Optional	Define additional Reason Codes required by the application in addition to the initial seeded values. Modify or delete existing Reason Codes	Reason Tab	CRM Administrator Interaction History Administrator
4	Optional	Define additional Action Item Codes required by the application in addition to the initial seeded values. Modify or delete existing Action Item Codes.	Action Item Tab	CRM Administrator Interaction History Administrator
5	Optional	Define additional Action Codes required by the application in addition to the initial seeded values. Modify or delete existing Action codes.	Action Tab	CRM Administrator Interaction History Administrator
6	Optional	Define the Outcome, Result, and/or Reason codes as required for specific campaigns and promotions.	Wrap Up Tab	CRM Administrator Interaction History Administrator

Step Number	Required?	Interaction History Setup Step Description	Window Name(s)	AIW Reference
7	Optional	Define unique pairs of Outcome-Results from existing Codes in the Outcome and Result tables.	Outcome Results	CRM Administrator Interaction History Administrator
8	Optional	Define unique pairs of Result-Reason from existing Codes in the Result and Reason tables.	Result Reasons	CRM Administrator Interaction History Administrator

Guidelines

All applications that have a touch point between a customer and resource must record this event as an interaction via Interaction History or another application serving as a proxy that uses Interaction History (for example, Universal Work Queue). Interaction History records can be browsed and retrieved by directly using its graphical interface, integrating its graphical interface into an application, or using its views. Use the Administration tool to modify setup data; do not modify Interaction History tables directly.

Browsing and retrieval of interactions can be integrated by invoking the Interaction History graphical interface directly from an application, integrating the Interaction History graphical interface into an application, or using Interaction History views and displaying the results as needed by the application.

Upon initiating a touch point, an interaction is created to serve as a repository for a set of business activities that will occur during the lifetime of the touch point. When a business activity is initiated, it is added to the interaction. After all business activities for the interaction are completed the interaction is closed, making it a historical record. Interactions can be browsed and retrieved during future active touch points or for business intelligence analysis. Media items associated with a business activity of an interaction are created before the interaction.

Concerns

Interaction History does not have any organizational constraints on operations or relationships. Interaction History does not have any multi-organizational tables.

Interaction History schema does not contain any table columns that are related to currency. Interaction History does have five translated tables which are used by applications for creating interactions and activities: JTF_IH_OUTCOMES; JTF_IH_RESULTS; JTF_IH_REASONS; JTF_IH_ACTION_ITEMS; JTF_IH_ACTIONS.

Troubleshooting Implementation of Interaction History

The following problems may result in incorrect behavior for Interaction History:

- **Cannot create an interaction** – mandatory parameters that must be validated. To create an interaction, a valid party_id (customer), resource_id (agent), outcome_id, and handler_id (application) are required. If any of these parameters are invalid or missing, the create interaction APIs will fail.
- **Cannot create an interaction** – optional parameters that must be validated. To create an interaction, the following optional parameters must be valid: result_id, reason_id, and campaign.
- **Cannot create an activity** – mandatory parameters that must be validated. To create an activity, a valid interaction_id, action_item (business activity type) and outcome_id are required. If any of these parameters are invalid or missing, the create activity APIs will fail.
- **Cannot create an activity** – optional parameters that must be validated. To create an activity, the following optional parameters must be valid: result_id, reason_id, action_id (sub-level detail related to business activity), media_id, task_id, cust_account_id, and campaign.
- **Cannot create a media item** – mandatory parameters that must be validated. To create a media item, a valid media item type and media data are required. If any of these parameters are invalid or missing, the create interaction APIs will fail.
- **Cannot create an interaction, activity, or media item** – failure to load mandatory parameter seed data.
  It is impossible to create an interaction if one of the following tables does not cannot seed data: outcomes and action items. These parameters must be validated.
- **Cannot create an interaction, activity, or media item** – failure to load optional parameter seed data. It is impossible to create an interaction if one of the following tables does not cannot seed data: results, reasons, and actions. It these parameters are set, then they must be validated.

References

Oracle CRM Foundation Components - Interaction History High-Level Design Document

Oracle CRM Foundation Components - Concepts and Procedures, Release 11*i*, April 2000, Part No. A83642-01

Setting Profile Options

Interaction History does not use profiles.

Workflows in Interaction History

Interaction History does not use Workflow processes.

Implementing Fulfillment

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully. This section covers the following topics:

- Release Dependencies
- Related Documentation and Resources
- Setting Up a Fulfillment Administrative User
- Assigning the JTF_FM_ADMIN Role to the Administrator
- Assigning the JTF_FM_Administrator Responsibility to the Application Administrator
- Defining and Configuring the Fulfillment Server
- Defining Resource Groups and Assigning Groups to Servers
- Configuring Email Servers
- Archiving Sent Emails
- Configuring Fax Servers
- Configuring File Servers
- Configuring Printers
- Creating Groups for Servers
- Creating a New Template
- Adding a Master Document to a Template
- Inserting Collateral into a Template
- Setting Up and Starting the Fulfillment Server

- Setting up Remote Command of the Fulfillment Server
- Modifying Startup Scripts for Remote Commands
- Sending Remote Commands through a Script File
- System Profile Options

Release Dependencies

Before Fulfillment is installed, these items must be installed and stable:

- CRM Foundation HTML Stack
- Interaction History
- Marketing Encyclopedia Foundation Component (MES)

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Oracle Workflow Guide*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process

Related Documentation

Document	Purpose
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Setting Up a Fulfillment Administrative User

The Foundation HTML Stack provides the interface for Fulfillment administration. The following table describes the basic steps for setting up Fulfillment.

Step	Required?	Description	Navigation Path
1	Yes	Creating an administrative user. ▪ Assign the JTF_FM_Admin role to the application administrator user. ▪ Assign the JTF_FM_Administrator responsibility to the same user.	 ▪ System Administrator: Security > User ▪ System Administrator: Security > User > Define
2	Yes	Identify the agents and the output devices you will use with Fulfillment.	▪ N / A
3	Yes	Define the Fulfillment server(s).	▪ Fulfillment Administrator: Server
4	Yes	Define the resource groups for each output device and assign groups to servers.	▪ Fulfillment Administrator: Groups
5	Yes	Adding a Master Document to a Template	▪ Fulfillment Administrator: Master Document > Upload
6	No	Associate a Master document with template.	▪ Fulfillment Administrator: > Template > Master Document
7	Yes	Set up and start the Fulfillment server.	▪ Oracle Applications

Assigning the JTF_FM_ADMIN Role to the Administrator

The JTF_FM_ADMIN role for the Fulfillment administrator has been pre-defined. Perform the following steps to assign the role to the appropriate user.

Prerequisites

The Fulfillment administrator must be defined as a user and have a password. The administrator must have the JTF_FM_ADMINISTRATOR responsibility assignment.

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the Users tab and click **Create**.

   The User Registration window opens.
3. Enter the following required information:
   - First Name
   - Last Name
   - UserName
   - Password
   - Verify Password
   - E-mail
4. Use the drop-down list to select an account type:
   - An **End user** is an individual that is not representing an organization.
   - A **Business user** is an individual that is representing an organization.
5. Click **Submit**.
6. In the System Administrator Console, select the Users tab.
7. Enter the Last Name of the Fulfillment administrator in the Search field and click **Go**.
8. In the user name column, click the user name.

   The User Details window opens with the particular user's details.
9. Click **Roles**.

   The User Role Mapping window opens displaying two lists: Available Roles and Assigned Roles.
10. Select the JTF_ADMIN role from the Available Roles list and click > to move it to the Assigned Roles list.

11. Click **Update** to complete the task of assigning the Administrator role to the Fulfillment administrator.

Assigning the JTF_FM_Administrator Responsibility to the Application Administrator

When Oracle CRM Applications are first installed, the sysadmin user is the only defined user. The JTF_FM_Administrator responsibility has been predefined. You must assign this responsibility to the user who is the administrator for Fulfillment.

You will need to know the *responsibility_id* and the *application_id* to perform this task. To determine this information, log on to SQLPLUS using the *apps* user ID and execute the commands listed in the following table.

Necessary SQLPLUS Commands

Information	Retrieval Command
responsibility_id	`SELECT RESPONSIBILITY_ID FROM FND_RESPONSIBILITY WHERE RESPONSIBILITY_KEY = 'JTF_FM_ADMINISTRATOR';`
application_id	`SELECT APPLICATION_ID FROM FND_APPLICATION WHERE APPLICATION__SHORT_NAME = 'JTF';`

Use the following procedure to assign the JTF_FM_Administrator responsibility to the appropriate user.

Prerequisites

The Fulfillment administrator user must be a registered user with a password. See Assigning the JTF_Admin Role to the Administrator.

Execute SQLPLUS commands to determine two values in your database: responsibility_id for the jtf_fm_administrator key, and application_id for JTF.

Steps

1. Use Oracle Forms to login as the System Administrator and navigate to **Security > User > Define**.
2. Enter the Fulfillment administrator's user ID in the User Name field.
3. Enter the Fulfillment administrator's password in the Password field.
4. Choose JTF_FM_ADMINISTRATOR from the Responsibility list of values (LOV).

5. Select **File > Save and Proceed**, then close this window.
6. In the System Administrator window, navigate to **Profile > System**.
7. In the Find System Profiles window, select the User box and enter the Fulfillment administrator's user name.
8. In the Profile field, enter JTF% and click **Find**.

   The System Profile Values window displays all the profiles that begin with JTF. The Fulfillment administrator's user name appears at the top of the User column on the right.
9. Modify the following profiles by entering values in the User column:
   - JTF_PROFILE_DEFAULT_APPLICATION: enter the value of the application_id used in your database
   - JTF_PROFILE_DEFAULT_RESPONSIBILITY: enter the value of the responsibility_id used in your database
   - JTF_PROFILE_DEFAULT_LANG: enter US
10. Select **File > Save and Proceed** and return to the Find System Profiles window.
11. In the Profile LOV, enter ICX% and click **Find**.
12. Select ICX: LANGUAGE and set the language to your language.
13. Select **File > Save.**

    The Fulfillment administrator now has been assigned the appropriate responsibility.

Defining and Configuring the Fulfillment Server

The Fulfillment server calls on database tables to supply the Fulfillment collateral, and sends the collateral to specified output devices. You need to configure the Fulfillment server with specific output devices and associate the output devices with specific agent groups.

When creating a new Fulfillment server, follow the procedures that are listed on the window in the Servers column. The procedures are listed in sequence, from top to bottom.

You must define the Time format as *yyyy-MM-dd HH:mm:ss.S*, where:

- yyyy is the year in four digits

- MM is the month in two digits (06)
- dd is the day in two digits (04)

  (Enter a space between dd and HH)
- HH is the hour, in two digits (from 01–24)
- mm is the minutes in two digits
- ss is the seconds in two digits
- S is milliseconds in one digit

Prerequisites

None

Steps

1. Select the Server tab.
2. Click **Create**.

   The General window opens.
3. Enter the **Server Name** and other information as necessary.
4. Enter the current date and the time of day that Fulfillment should begin operations in the Start Time field. The Start time should occur after the date and time that the server is created.
5. Enter a date and the time of day that Fulfillment should end operations in the Shut Down Time field. The StartTime and Shut Down Time should not be specified if the Fulfillment server runs 24 hours a day.
6. Enter a unique name for the Request Queue.
7. Enter a unique name for the Response Queue.
8. (Optional) Enter a description for the server.
9. Click **Continue**.

   Once the Request Queue and the Response Queue are created, JTF_FM_ is added to the front of the unique names you entered.

See Also

- Configuring Email Servers

- Configuring File Servers

Defining Resource Groups and Assigning Groups to Servers

A resource group is a group of people. Each resource group must be assigned to a Fulfillment server. Perform the following steps to define a group and assign it to a server.

Prerequisites

A Fulfillment server must be defined and configured. Agents must be registered users.

Steps

1. In the Fulfillment Administrator Console, select the Server tab and click **Groups** > **Create**.

   The Create Group window displays the fields you need to create a resource group.

2. Enter the Group Name and Description. Select the appropriate Server from the list.

3. In the list of Agents, click **Go** to begin a search of Agents.

   The Select Agent window opens.

4. In the Select Agent window, enter the initial letter of the agent's name with % and click **Search**.

5. Click the agent name to add the agent to the group. Repeat steps 3 and 4 for each of the agents you want to include in the group.

6. When the list of agents is complete, click **Create**.

Configuring Email Servers

The second step in configuring the Fulfillment server is to associate the email servers with the Fulfillment server.

Prerequisites

You must have already created the server. To begin, see Defining and Configuring the Fulfillment Server.

Steps

1. In the Email Servers window, choose the **Add** button to add a new email server.

   The Create Email Server window opens.

2. In the fields on the Create Email Server window, enter the information required to describe the email server that you are adding. In the Incoming and Outgoing server fields, enter the IMAP or SMPT server names.

3. Click **Save**.

   The Email Servers window appears.

4. To add more Email servers, repeat steps 1, 2, and 3.

Archiving Sent Emails

Every email message that gets created by the Java Mail API, used by the Fulfillment server, has a message identifier (SMTP ID) associated with it. The message identifier is retrieved and stored as part of an interaction activity in Interaction History. The Fulfillment server will fetch SMTP ID for outgoing emails that are sent through direct SMTP connection. The server makes a connection to the email server with a login account.

The following information is required for the Fulfillment server to store emails on an IMAP Server.

- IMAP Server Name
- IMAP User Id
- IMAP Password
- IMAP Folder Name

The extended header tag was designed for Fulfillment to be a simple name-value pair consisting of header name and header value. The information of IMAP Server, IMAP User Id, IMAP Password, and IMAP Folder is passed in as part of the extended header as follows:

```
    <extended_header>
    <header_name>
IMAP Server
    </header_name>
    <header_value>
imap01.companyname.com
    </header_value>
```

```
    </extended_header>
    <extended_header>
    <header_name>
IMAP User Id
    </header_name>
    <header_value>
Scott
    </header_value>
    </extended_header>
    <extended_header>
    <header_name>
IMAP Password
    </header_name>
    <header_value>
Tiger
    </header_value>
    </extended_header>
    <extended_header>
    <header_name>
IMAP Folder
    </header_name>
    <header_value>
Sent Fulfillment
    </header_value>
    </extended_header>
```

For example, a Fulfillment request is created to email collateral to a customer. Fulfillment sends the automated response and makes a copy of the email message sent out for archiving in the sent folder. Fulfillment captures the SMTP ID of the copy of the outgoing email message and creates a media item for the response and inserts the SMTP ID in the MEDIA_ITEM_REF column. Fulfillment records the interaction by creating the interaction history record and two corresponding activities inbound email and outbound responses.

Configuring Fax Servers

WARNING: Windows relating to fax functionality or capability are not supported at this time, and should not be used.

Configuring File Servers

WARNING: Windows relating to file server functionality or capability are not supported at this time, and should not be used.

Configuring Printers

WARNING: Windows relating to print functionality or capability are not supported at this time, and should not be used.

Creating Groups for Servers

The last step in configuring the Fulfillment server is to associate agent groups with the Fulfillment server, and associate output devices with the groups. By associating a group to an output device, you indicate that the group will use that device. You must create an association for each agent group to each output device for which the group needs access. Perform the following steps to associate an agent group to one or more output devices.

Note: When a group is associated to a Fulfillment server, that server's file server is automatically available for the group. You do not need to associate a file server to a group or its agents.

Prerequisites

You must have already created the Fulfillment server. See Define and Configure the Fulfillment Servers.

Steps

1. To add a group, in the Groups window, choose the **Add** button.

   The Select Group window opens.

2. From the Group Name drop-down list, choose a group to associate with the Fulfillment server.

3. Choose **Go**.

The Output Devices window opens to display a list of output device types. Create an association with each output device to which the group needs access.

4. From the list of values (LOV) for one type of output device, choose one or more devices to be associated to the group.
5. Click **Create** to create the association or click **Clear** to clear associations that you have selected but have not yet created.
6. Repeat step 5 and 6 for each type of output device to be associated to the group.
7. Click **Save** to complete the association of the group to output devices.

See also

Creating New Groups

Adding Agents to a Group

Creating a New Template

A template is a pre-defined package of brochures, newsletters, or other customer-oriented information that an agent can direct to customers in response to a Fulfillment request. Text found in a template is associated to one or more master documents.

Perform the following steps to create a new template.

Prerequisites

- An uploaded Master Documents must exist.
- Collateral must already be stored in the database.

Steps

1. Select the Template tab.
2. Click **Create**.

   The General window opens.
3. Enter a **Template Name**.
4. In the Status drop-down list, choose either:
   - **Active** to make the template available to requests.
   - **Inactive** to make the template unavailable to requests.

5. (Optional) In the Description field you may enter a description of the template.
6. (Optional) Enter the name of the marketing campaign you want to associate with the template.
7. Click **Save**.

   The Template Master Document window opens.

See Also

Updating Fulfillment Templates

Adding a Master Document to a Template

Perform the following steps to add a master document to a template.

Prerequisites

The template must already exist. See Creating a New Template.

Steps

1. Choose the Template tab.

   The View Template window opens.
2. Choose the name of the template that you want to add.

   The template details window opens.
3. Choose the Master Document link in the left frame.

   The View Template, Master Documents window opens.
4. Choose **Go** to add more master documents.
5. Choose **Update** to save.

Inserting Collateral into a Template

Perform the following steps to add collateral to a template.

Prerequisites

None

Steps

1. Choose the Template tab.

   The View Template window opens.

2. Choose the name of the template that you want to update.

   The template details window opens.

3. Choose the Collateral link in the left frame.

   The View Template, Collateral window opens.

4. Click **Go** to add collateral.

5. Click **Update** to save.

Setting Up and Starting the Fulfillment Server

Perform the following steps to set up the server.

Note: Perform the following procedure in either a UNIX or Windows-NT environment.

Prerequisites

You must be able to log on to the System Administration Console as JTF_FM_ADMIN, or in a similar role, to perform the following steps.

Note: For details on this account, see Assigning the JTF_FM_ADMIN Role to the Administrator, and Assigning the JTF_FM_Administrator Responsibility to the Application Administrator.

Steps for creating a Fulfillment server using the SysAdmin Console

1. Log on the System Administration Console as an administrative user. (For example, log on as JTF_FM_ADMIN.)

2. Select the Server tab.

3. Create a new Fulfillment server.

4. Note the ID number of the server.

This number is needed in the start-up script for the server. Usually, the first time a server is created, it's ID is 10000. After that, it increments by one with each new server.

5. Create an e-mail server to associate with the Fulfillment server that was created in step 3.

   This is an email server associate mailed with the Fulfillment server, not any other email server. This email server will need to have the outgoing email server set.

   For many UNIX environments, give the name of the UNIX box that is to run the Fulfillment server. For example, this could be similar to AP102SES.COMPANY.COM.

6. In the Group tab, create a group and associate a Fulfillment server to that group. (This should preferably be the same one that was just created.)

7. Assign a user to that group.

   The ID of the user, since you may be submitting requests with that user.

8. Return to the Server tab and find the server that you created in step 2.

9. Double-click the server name to open the general information window.

10. Select Groups at the left hand side of the window.

    The Select Group window opens.

11. Associate the group you created with this server, and select **Go**.

    The Output Devices window opens.

12. Associate an e-mail server with this server, and select **Create**.

13. Select **Save**.

14. Select the Template tab.

15. Click **Master document**.

16. Click **Upload**.

17. Follow the upload steps to upload master documents to the server.

Steps for setting up the shell or batch script

1. Modify the classpath so that it points to both apps.zip and 3rdparty.zip

2. Create a simple batch file, or UNIX shell script, from which the server can be configured and executed.

   Here is a batch file example:

```
java -ms32m -mx64m -nojit\ (for UNIX shell script, add exec to the beginning
                            of the line and trhere should not be any
                            carriage returns in the script.)
-Dengine.OutputDir=output\
-Dengine.CommandPromptEnabled=true\
-Dengine.ServerID=999\
-Dengine.AOLJ.config= d:\lib\jtf.dbc\
oracle.apps.jtf.fm.engine.processor.Processor\
```

   Parameters

   - `engine.OutputDir`

     This parameter specifies the output directory to be used by the Fulfillment Dispatcher. Early versions of Fulfillment server may not have this feature.

   - `engine.CommandPromptEnabled`

     This parameter must be set to true if you want to interact with the Fulfillment server via the command prompt.

   - `engine.ServerID`

     This parameter specifies the ID of the server.

   - `engine.AOLJ.config`

     This parameter specifies the location of the jtf.dbc file that the server needs to be able to communicate with the database.

   - `engine.refreshrate`

     (Optional) This parameter specifies is the number of milliseconds between the status checks that the processor performs.

   - `engine.LogPath`

     This parameter specifies the location of the log files that the Fulfillment server writes to. The default is a directory called log off of the directory where the Fulfillment server is started.

   - `engine.TempDir`

This parameter specifies a temporary directory where the Fulfillment server can swap files that would normally be too large when collectively stored in memory. This value must be set in absence of the profile option JTF_FM_TEMP_DIR. It can also be used to override the value of JTF_FM_TEMP_DIR

- `engine.EventLog`

  This parameter specifies an alternative name for the Events log. This value may be set in the absence of the profile option JTF_FM_EVENTS_LOG. It can also be used to override the value of JTF_FM_EVENTS_LOG. This value will default to Events.log if not set at all.

- `engine.ErrorLog`

  This parameter specifies an alternative name for the Error log. This value may be set in the absence of the profile option JTF_FM_ERROR_LOG. It can also be used to override the value of JTF_FM_ERROR_LOG. This value will default to Error.log if not set at all.

- `engine.LogLevel`

  This parameter specifies the level of detail recorded in the Error log. This value may be set in the absence of the profile option JTF_FM_LOG_LEVEL. It can also be used to override the value of JTF_FM_LOG_LEVEL. This value will default to 4, the highest level of detail, if not set at all. The lowest value of zero should never really be used since it means that no errors will be recorded at all.

- `engine.LogRequests`

  This parameter is a Boolean property that can be used to specify that Fulfillment Requests are to be saved before processing. The request will be saved with the request id in the name. For request id 10010 the logged request will be 10010.xml and can be found in the requests directory within the log directory. This value is false by default.

- `engine.LogDispatches`

- This parameter is a Boolean property that can be used to specify that Fulfillment Requests are to be saved after processing and before dispatching. The request will be saved with the request id in the name. For request id 10010 the logged request will be 10010.xml and can be found in the dispatches directory within the log directory. This value is false by default.

- `engine.FaxEnabler`

This parameter specifies is used to specify the name of the class that enables fax requests to be fulfilled.

- `engine.PrintEnabler`

  This parameter specifies the name of the class that enables print requests to be fulfilled.

3. Execute the batch file or UNIX shell script to start the Fulfillment server.

   Guidelines: Use the following Fulfillment server commands:

   - `stat:` Prints statistics on the current state of the Fulfillment server.
   - `stop:` Stops the Fulfillment server. This command stops all processing within the Fulfillment server. It can resume processing with the start command.
   - `start:` Starts the Fulfillment server. Should only be executed after a stop has been issued.
   - `restart:` stops and restarts the Fulfillment server. This is similar to a soft reboot of a Personal Computer.
   - `help:` Displays all valid commands for the Fulfillment server.

Testing your setup

Test your server setup by submitting a request and verifying that it shows up as successful in the logs.

Setting up Remote Command of the Fulfillment Server

The Fulfillment server has the ability to receive remote commands through a command port. These remote commands are sent through a remote command script that runs on the same machine as the running Fulfillment server you want to command. This remote command script only runs on the same machine as the running Fulfillment server you want to control. The script interacts with the server without the need of maintaining the original command prompt used to start the server.

When a command is sent through this script, the command is sent, a response is waited for, and the script ends. A connection to the Fulfillment server is not maintained between issued commands.

Prerequisites

You must be able to log on to the System Administration Console as JTF_FM_ADMIN, or in a similar role, to perform the following steps.

Steps for Setting up a remote command script

For the purpose of sending commands to a running Fulfillment server, you create a new script that will be executed every time a remote command. To create a script to send commands to port 99999, the body of the script should appear as:

For UNIX:

```
#!/bin/csh
java –Dengine.CommandPort=99999 oracle.apps.jtf.fm.engine.remote.RemoteCommand
$*
```

For DOS:

```
java –Dengine.CommandPort=99999 oracle.apps.jtf.fm.engine.remote.RemoteCommand
%*
```

Note: If you using an older version of the Fulfillment Server, you may be using a version of the Fulfillment Server in which the Remote Command class is found under "oracle.apps.jtf.fm.engine.processor" package as in "oracle.apps.jtf.fm.engine.processor.RemoteCommand" instead of "oracle.apps.jtf.engine.remote.RemoteCommand". It is also possible that the version of the server you are running predates the use of remote commands in which case you need to update your version with a patch.

In both cases, the property engine.CommandPort must contain the numeric value of an available port on the machine running the Fulfillment server.

Modifying Startup Scripts for Remote Commands

Prerequisites

Set up the Remote Command of the Fulfillment Server

Steps for Modifying the Startup Scripts

To set up the Fulfillment server so that it will listen to remote commands, add the text -Dengine.CommandPort=##### to the Fulfillment server Startup Script. To listen to port 99999 add the following text:

```
-Dengine.CommandPort=99999
```

Sending Remote Commands through a Script File

Prerequisites

Set up the Remote Command of the Fulfillment Server

Modify Startup Scripts

Create a Script file

Steps

Once you have created a script file (see Setting up a remote command script) you can run it with any of the recognized Fulfillment server commands as follows:

```
[script name] [server command]
```

where [script name] is the name of the script file and [server command] is the command you want to execute. Some of the commands received by the Server issues a response such as with

```
stat
```

the command that gets the Server statistics. If you have a script named remote.script and you want to run

```
stat
```

against a Fulfillment server that is listening to port 99999 for remote commands you would type:

```
remote.script stat
```

Data appears at the command prompt just as if you were to type stat from the Fulfillment servers' command prompt. The following are the results of sending a remote 'stat' command:

```
SENDING>stat
RESPONSE>-- PROCESSOR STATISTICS --
>--Memory Use: 599.39Kb of 32767.99Kb -- 1.83%
```

```
>PROCESS MONITOR : Monitor Started
>REMOTE MONITOR : Monitor Started
>COMMAND MONITOR : Monitor Started
>REQUEST MONITOR : Monitor Started
>#processes:5; running:5; idle:5; processing:0; dead:0
>Max Idle Time:14 seconds; 59 milliseconds
>Event Log:Events24.log
>Error Log:Errors24.log
>ACTIVE THREAD(S):11
```

System Profile Options

Use the following list to identify the profile options which need to be set for your specific implementation. Set these profile options in any order.

- JTF_FM_TEMP_DIR
- JTF_FM_OUT_DIR
- JTF_FM_EVENTS_LOG
- JTF_FM_ERROR_LOG
- JTF_FM_LOG_LEVEL
- JTF_FM_NUM_PROCESSES
- JTF_FM_MIN_PROCESSES
- JTF_FM_MAX_PROCESSES
- JTF_FM_PROCESS_IDLE
- JTF_FM_MAX_PROCESS_IDLE
- JTF_FM_REFRESH_RATE

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option JTF_FM_TEMP_DIR

The following table details JTF_FM_TEMP_DIR, which sets the temporary directory for the Fulfillment engine. (This is not a full path.)

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site

X	X	X	X			X

Profile Option JTF_FM_OUT_DIR

The following table details JTF_FM_OUT_DIR, which sets the output directory for the Fulfillment engine.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_EVENTS_LOG

The following table details JTF_FM_EVENTS_LOG, which sets the events log name for the Fulfillment engine.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_ERROR_LOG

The following table details JTF_FM_ERROR_LOG, which sets the error log name for the Fulfillment engine.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_LOG_LEVEL

The following table details JTF_FM_LOG_LEVEL, which sets the level of logging detail.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_NUM_PROCESSES

The following table details JTF_FM_NUM_PROCESSES, which sets the number of engine processes at the start up of the Fulfillment engine.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_MIN_PROCESSES

The following table details JTF_FM_MIN_PROCESSES, which sets the minimum number of processes available at any given time in the Fulfillment engine.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_MAX_PROCESSES

The following table details JTF_FM_MAX_PROCESSES, which sets the maximum number of processes available at any given time in the Fulfillment engine.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_PROCESS_IDLE

The following table details JTF_FM_PROCESS_IDLE, which defines the number of milliseconds a process is allowed to remain idle before the processor starts reducing to the minimum.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_MAX_PROCESS_IDLE

The following table details JTF_FM_MAX_PROCESS_IDLE, which defines the maximum number of milliseconds a process is allowed to remain idle before the processor starts reducing to the minimum.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Profile Option JTF_FM_REFRESH_RATE

The following table details JTF_FM_MAX_PROCESS_IDLE, which defines the number of milliseconds a process is allowed to remain idle before needing a refresh.

	User can		Admin Setting Levels			
Required	View	Update	User	Responsibility	Application	Site
X	X	X	X			X

Implementing Assignment Manager

This topic group provides general descriptions of the setup and configuration tasks required to implement the application successfully. This section covers the following topics:

- Related Documentation and Resources
- Setting System Profile Options

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Oracle Workflow Guide*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Setting System Profile Options

Use the following list to identify the profile options that you need to set for your specific implementation. You can set these options in any sequence.

- ACTIVATE_AUTO_SELECT
- ACTIVATE_CONTRACTS_PREFERRED_ENGINEERS
- ACTIVATE_IB_PREFERRED_ENGINEERS
- ACTIVATE_WORKFLOW_NAME

To change profile options, use the standard procedure outlined in the *Oracle Applications Users Guide*.

Profile Option ACTIVATE_AUTO_SELECT

The following table describes the profile option ACTIVATE_AUTO_SELECT, which is set to activate the auto-selection of resources by the Assignment Manager engine.

The Assignment Manager engine uses this profile option setting to determine whether the user needs to make a selection from the provided list of resources, or if this task is performed automatically by the Assignment Manager engine itself.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Responsibility**	**Application**	**Site**
X	X	X	X	X	X	X
Setting	**Description and Usage Considerations**					

Y / N	Default is Yes.

Profile Option ACTIVATE_CONTRACTS_PREFERRED_ENGINEERS

The following table describes the profile option ACTIVATE_CONTRACTS_PREFERRED_ENGINEERS, which is set to retrieve the preferred resource information from the Contracts module.

The Assignment Manager engine uses this profile option setting to determine whether the Contracts Preferred Engineers are picked automatically by the Assignment Manager engine or not.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Responsibility**	**Application**	**Site**
X	X	X	X	X	X	X

Setting	**Description and Usage Considerations**
Y / N	Default is No.

Profile Option ACTIVATE_IB_PREFERRED_ENGINEERS

The following table describes the profile option ACTIVATE_IB_PREFERRED_ENGINEERS, which is set to retrieve the preferred resource information from the Installed Base module.

The Assignment Manager engine uses this profile option setting to determine whether the Installed Base Preferred Engineers are picked automatically by the Assignment Manager engine or not.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Responsibility**	**Application**	**Site**
X	X	X	X	X	X	X

Setting	**Description and Usage Considerations**
Y / N	Default is No.

Profile Option ACTIVATE_WORKFLOW_NAME

The following table describes the profile option ACTIVATE_WORKFLOW_NAME, which is set to a user-defined workflow procedure name.

This workflow procedure is user-programmed code for further filtering the resources. The Assignment Manager engine retrieves the procedure name from this profile option and uses it to process the user's request.

	User can		Admin Setting Levels			
Required	**View**	**Update**	**User**	**Responsibility**	**Application**	**Site**
X	X	X	X	X	X	X

Setting	**Description and Usage Considerations**
None	The name of a user-defined procedure. There is no default. This is a user-defined procedure; it may or may not exist.

Implementing the Business Rule Monitor

This topic group provides general descriptions of the setup and configuration tasks required to implement the module successfully.

The topics covered in this group include:

Related Documentation and Resources

You may also wish to consult the following documentation:

- *Oracle Applications, Product Update Notes, Release 11i*
- *Installing Oracle Applications, Release 11i*
- *Implementing CRM Applications*
- *Oracle CRM Foundation Components, Concepts and Procedures*
- *Oracle CRM Foundation Technical Reference Manual*
- *Oracle Workflow Guide*

These documents range from the general to the specific, in the order listed in the following table.

Related Documentation

Document	Purpose
Oracle Applications, Product Update Notes, Release 11*i*	Contains information about new product features and functions for the various Oracle applications
Installing Oracle Applications, Release 11*i*	Documents the Rapid Install installation process
Implementing CRM Applications, A85301-01	Contains post-installation information on CRM modules
Oracle CRM Foundation Components, Concepts and Procedures	A printed compilation of the Oracle Foundation online help system
Oracle CRM Foundation, Technical Reference Manual	Contains table and view descriptions for all the Foundation components

Setting Up The Business Rule Monitor

Oracle Escalation Manager provides two types of escalation management:

- Reactive, or activity in response to a customer behavior
- Proactive, or an automated response to a violation of business rules

A workflow process controls the Business Rule Monitor, which in turn periodically checks the business rules that have been defined. The user that owns this workflow process receives notifications when the process starts and stops, and also when errors are detected. This user must be defined to ensure that an owner of the workflow process exists and that the notifications can be sent successfully. Usually, the workflow owner is the system administrator.

The Business Rule Monitor provides pre-defined business rules, which are detailed in the table to follow. You may design your own rules that have been customized for your enterprise.

Step	Required?	Steps to Implement Escalation Manager
1	Yes	Define the owner of the workflow process.
2	Yes	Set the Business Rule Monitor system profile option.
3	Yes	Start the four background Business Rule Monitor workflow processes
4	Yes	Start the Business Rule Monitor.

Step	Required?	Steps to Implement Escalation Manager
5	Optional	Define new, customized business rules.
6	Yes	Verify that an Escalation Territory has been created and contains at least one resource

Defining the Owner of the Workflow Process

The owner of the workflow process is assigned to an existing user. This is typically the system administrator or the workflow administrator.

Prerequisites

The designated workflow owner must already exist in order to assign the workflow process. If no workflow owner exists, then the account must first be created.

Steps

1. In the System Administrator responsibility, navigate to **Security > User > Define**.

   The Users window opens.

2. Enter an existing user name in the Name field.

3. Enter a password in the Password field.

   Do not press Enter to move to the next field, you must move your cursor.

4. Select the following responsibility from the LOV in the Responsibility field. This grants the responsibilities to the user.

   - Workflow Administrator

5. Select **File > Save**.

Setting System Profile Options

Use the following procedure to set the system profile option: Business Rule Monitor Workflow Administrator.

You can set these profile options in any order you like.

Prerequisites

None

Steps

1. In the System Administrator responsibility, navigate to **Profile > System**.

   The Find System Profile Values window opens.

2. Enter the following in the Profile field:

   ```
   Business Rule Monitor Workflow Administrator
   ```

3. Click **Find** to open the System Profile Values window.

4. Enter the name of the workflow administrator in the Site field.

   This user is the one that you previously named in Defining the Owner of the Workflow Process.

5. Select **File > Save**.

Starting the Background Workflow Processes

There are four predefined workflow item types. The first item type, JTFBRM, is internal to the Business Rule Monitor and has no user-defined attributes. The next three item types have specific attributes defined for each process. These attributes are maintained within the Business Rule Workbench, and can be viewed by clicking the button next to the workflow field. The following table describes the preseeded workflow processes.

Preseeded Workflow Processes

Item Types	Description
JTFBRM	Business Rule Monitor Main Process
JTFBRMDF	Business Rule Monitor Defect Process
JTFBRMPR	Business Rule Monitor Task Process
JTFBRMSR	Business Rule Monitor Service Request Process

Proper operation of the Business Rule Monitor requires that these four background workflow processes be started before starting the Business Rule Monitor. Use the following procedure to start these background processes.

Prerequisites

None

Steps

1. In the System Administrator responsibility, navigate to **Requests > Run**.

   The Submit a New Request window opens.

2. Select Single Request and click **OK**.

3. In the Submit Requests window, type **W** in the Name field and press [Enter] on the keyboard.

   The Reports window opens and displays report names that begin with w.

4. Select **Workflow Background Process** and click **OK**.

   The Parameters window opens.

5. Type **bu** in the Item Type field and press [Enter] on the keyboard.

   The Item Type window opens and displays the four Workflow background processes required by the Business Rule Monitor.

6. Select one of the four Business Rule Monitor processes and click **OK**.

   Leave the Minimum Threshold and Maximum Threshold fields empty.

7. Enter **Yes** in the Process Deferred field, and in the Process Timeout field and click **OK**.

   The Submit Request window appears in front.

8. Click **Schedule** on the Submit Request window.

   The Schedule window appears in front.

9. Select **Run the Job...Periodically**.

   More options appear for defining the time period.

10. Define the Start time and the End time.

    WARNING: Be sure to define an end time. When the end time field is blank, the process runs indefinitely and cannot be shut off.

11. In the Rerun Every fields, enter the number of minutes that defines the interval between job runs.

12. Select the From the Completion of the prior run box and click **OK**.

13. Repeat this entire procedure for each of the four workflow background processes.

Guidelines

Set up Notifications in Oracle Workflow to ensure that notifications are sent to e-mail.

Starting the Business Rule Monitor

The Business Rule Monitor monitors the workflow processes. In the Business Rule Monitor, you must indicate how often the monitor checks the rules. Once the Business Rule Monitor is started, there is no need to start it again, even after defining new business rules. Use this procedure to start the Business Rule Monitor.

See also

Starting the Background Workflow Processes.

Prerequisites

The four Workflow background processes for the Business Rule Monitor must be started before starting the Business Rule Monitor. If you have designed customized workflow background processes, they must also be started. In addition, the *Business Rule Monitor Administrator* profile option must be set.

Steps

1. In the CRM Administrator responsibility, navigate to **Business Rule Monitor > Business Rule Monitor**.

   The Business Rule Monitor opens.

2. Enter the time period in the Interval field. Enter a time unit (minutes or hours) in the UOM field.

3. Click **Save.**

4. Click **Start** to activate the Business Rule Monitor.

   A dialog box confirms that the Business Rule Monitor started successfully.

   Click Workflow Monitor to view details of this process.

Guidelines

After the monitor is started, the Stop button appears. Click **Stop** to stop the monitor.

Click **Refresh Status** to get an immediate status on the Workflow background processes.

Defining a Business Rule

In addition to the pre-defined business rules provided with the Business Rule Monitor, you can define your own business rules. Use the following procedure to define a business rule.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Business Rule Monitor > Business Rules Monitor Workbench**.

   The Business Rules Monitor Workbench window opens.

2. Enter values for the following:

   - **Name**: The name of the new business rule
   - **Object**: The type of business rule
   - **Check Rule Every**: The time interval that you want
   - **Workflow**: Chose a workflow from the drop down menu.

   Attributes can be defined for the Workflow and an Owner for the business rule.

3. Use the fields in the Simple tab to construct a PL/SQL statement that defines the conditions under which the business rule is triggered.

4. Click **Validate** to check the syntax of the PL/SQL statement defined in the Simple tab. The syntax check verifies whether or not the syntax is correct.

   A dialog box confirms that the syntax validation was successful. Click **OK.**

   Click **Generate**. A dialog box confirms that your business rule has been generated.

5. Select **File > Save**.

Verifying Escalation Territory Creation

An escalation territory is a placeholder for resources that you want to put into service under certain conditions. Escalation territories are defined in Territory Management. Ensure that at least one resource is identified in the Catch All Escalation Territory.

See also

View the following topics in Territory Manager for additional information:

- Basic Territory Building Blocks
- Viewing Escalation Territories
- Creating Escalation Territories

Implementing Dynamic Tables

This topic group provides general descriptions of the setup and configuration tasks required to implement the spreadtable successfully.

Creating a New Dynamic Table

Use the Spreadtable Meta Data Administration window to design spreadtables that plug into an Oracle Forms bean area container.

- A spreadtable is the user interface component that contains rows, columns, and column headers set in a grid that can be embedded into an Oracle form.
- Oracle Forms-based CRM modules use the spreadtable to display and format dynamically retrieved data at run time. This is accomplished by predefined metadata definitions.
- Metadata is information that defines what data is retrieved at run time and how that information is presented.

The following table describes the Speadtable Meta Data Administration tabs.

Tab	Description
Database	Use to set column type and order, datatype, sequence, and default sort order.
Display	Use to set column label, visibility, display sequence, and display width.
Alignment and Formatting	Use to set type of header and cell alignment, as well as display type and format.
Custom Format Masks and Mappings	Use to set how data displays. This applies only to columns with datatype of Number. For example, it would display the values as a percent.

Tab	Description
Query	Used exclusively by Universal Work Queue. It is for internal use only.
Sort Order	Use to set the overall sort order of the columns for the spreadtable. For example, you may set the primary sort order to be alphabetical based on column A, and set a secondary sort order to be numerical based on column B.
Test	Use to test the spreadtable that you are defining.

WARNING: Note the following:

Oracle does not support custom development of new forms using the spreadtable interface.

Do not delete currently existing columns when modifying an existing spreadtable. Instead, use the Freeze Visible State property in the Display tab to make the column invisible to the user.

Do not delete any existing metadata definitions.

If you modify existing metadata definitions, these changes may be overwritten by subsequent patches.

Perform the following steps to create a new spreadtable.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Spreadtable Administration**.

   The Spreadtable Meta Data Administration window opens.

2. Define a new datasource (a set of metadata) by entering the following:

   - **Datasource Name**: The unique name that identifies a set a metadata. It must always be <Application Prefix>_<Name>.
   - **Application**: The name of your product.
   - **Title**: A descriptive name for this set of metadata.

- **Relational View Name**: Select from the LOVs the name of the view from which information is to be retrieved to populate the spreadtable.
- **Lines/Rows**: Enter how many lines of text are to display per row.
- **WHERE Clause**: (Optional) Enter a SQL statement here if desired. Use this field to enter filtering criteria. NEVER start with the keyword WHERE, as this is automatically prepended to the statement. Always use bindvariables if the value changes at runtime.

3. Select the Database tab, if it is not already selected, and enter the following for each column that you wish to display in the spreadtable:
   - **Column Alias**: The column alias becomes part of the primary key.
   - **View Column/ Function**: Select from the LOVs the desired name of the View Column.
   - **Datatype**: Select from the LOVs either character, number, or date.
   - **Query Sequence**: The sequence value determines the order in which columns are extracted from the database. You could start with 1, but in actual practice, it is a good idea to leave gaps in the sequence for ease of row insertion later. To improve performance, begin with the columns that you will refer to in your code, typically the primary key columns to execute a query in a detail block.
   - **Sortable**: Selecting this box allows the user to sort on this column.
   - **Default Sort Order**: Sort in ascending or descending default order.
4. Select the Display tab, and enter the following for each column that you defined previously:
   - **Visible**: Select to make this column visible in the spreadtable.
   - **Freeze Visible Property**: Select if you want the end user to be able to change the visible properties (show / hide) at run time for this column.
   - **Display Sequence**: The value determines the order in which the columns display in the spreadtable.
   - **Display Width**: Sets the width (in pixels) of the displayed column. This value depends on the data that is displayed in the column.
   - The Column Alias and Label fields are supplied automatically. However, you may change these values, if desired.
5. Select the Alignment and Formatting tab, and enter the following:

- **Header Alignment**: Select from the LOVs either Center, End, Right, or Start.
- **Cell Alignment**: Select from the LOVs either Center, End, Right, or Start.
- **Display Type**: Select from the LOVs either check box, Hyperlink, or Text.
- **Display Format:** (Optional) Select from the LOVs either Currency, Date, or Date Time.

6. Select the Custom Format Masks and Mappings tab.
   - **Column Alias**: The column alias field is filled automatically.
   - **Check box Mappings**: These options apply only if the display type field in the Alignments and Formatting tab is set to check box.
     * **Checked**: Sets whether or not a column value is represented as a checked check box or as its corresponding image.
     * **Unchecked**: Sets whether or not a column value is represented as an unchecked check box or as its corresponding image.
     * **Other**: Sets how values other than those specified as either checked or unchecked are represented.
   - **Format Mask**: Use to set how columns with datatype Number display data. For example, it would display the values as a percent. Use this only in rare cases.
   - **Currency Column**: Points to the database view column where the currency code for the current column is stored. This applies only if the display format is set to Currency.
7. Select the Sort Order tab, and perform the following:
   - Choose the Primary Sort key from the LOVs.
   - You can optionally select a second or third Sort key from the LOV.
8. Click the Save icon on the toolbar. (The icon looks like a floppy disk.)
9. Select the Test tab, and click **Test**.

   Your table displays. Refer to Using Dynamic Tables for additional information on spreadtables.

Administering Gantt

This topic group provides task-based procedures relating to the set up and configuration of the TCF (Thin Client Framework) servers, used with Gantt charts.

This section covers the following topics:

What is a Gantt Chart?

A Gantt chart displays tasks or some other time bound entities in relation to their owner / assignees. As such it is typically used for scheduling purposes, where a manager can view the teams current workload and make real time decisions on who should be assigned a new task, or alternatively make adjustments and reassign tasks between members of the team.

Gantt charts are used by the following CRM modules:

- Field Service Control Tower
- Assignment Manager

The Gantt chart is designed as a Java Bean that can be plugged into any Oracle Forms based application.

What is TCF?

TCF is the acronym for Thin Client Framework. The Thin Client Framework server is a middle tier process that enables certain Java components of the Oracle Applications user interface to communicate with the middle tier and database tier. Within CRM, these components are:

- Field Service Scheduler
- JTF Gantt Chart

The TCF server process should always be running in a production installation.

The SocketServer Class

The TCF server uses the SocketServer class (in the oracle.apps.fnd.tcf package) to handle incoming connections. Administration of the TCF server is typically handled through the ServerControl class (in the same package), which basically provides a clean interface around all the different TCF server functions that an administrator might perform (for example, starting, stopping, updating, and other similar tasks).

Oracle recommends using the ServerControl class for most purposes.

Caution: The order and list of parameters for the ServerControl class, and the SocketServer class are not the same. Refer to the *Administering the TCF Server (11i)* documentation for a complete list. You can access this document on Metalink (Note 123689.1).

Proxy Objects and Dispatchers

TCF comprises the following:

- A pair of Dispatcher classes which own the network connection
- An interface called Proxy which enables an object to use the TCF network connection.
- An Item class which serializes data for transmission

Generally, the client application or applet creates a number of Proxy objects at the same time, then asks the Dispatchers to connect these objects to peer objects on the middle tier.

- Proxies are implemented in pairs, one for the client, one for the middle tier.

- The Dispatchers maintain a list of connected proxy pairs and handles the routing of messages.
- Proxies communicate by writing messages to a buffer maintained by a Dispatcher, and then instructing the Dispatcher to send these messages.
- Several proxies can share a round trip by waiting to call "send" until after each has had an opportunity to write its messages.
- The Dispatchers deliver these messages by invoking the readItem method of Proxy.

Implementing the TCF Servers for Gantt

Gantt charts are used extensively by the various modules of the Oracle E-Business Suite. However, for a Gantt chart to display and render properly, the TCF server must be running and correctly configured.

The following tables lists the configuration steps that you must perform in setting up and configuring the TCF server.

TCF Configuration Steps

Step	Description
1.	Apply any necessary patches.
2.	Perform the post-install steps.
3.	Configure the servers.
4.	Verify the server configuration.
5.	Troubleshoot any problems that arise.

Step 5, troubleshooting problems that might arise with the TCF server configuration and setup is covered extensively in the Troubleshooting Gantt section.

Step 1: Installing any Required Patches

The first step in setting up and configuring the TCF server is to install any patches that are necessary for the correct performance of your particular system.

Patch 135908

You must apply patch 135908 if you have set up the Oracle Applications to use HTTP protocol for communicating between a client browser and Oracle Forms and TCF servers.

135908 HTTP mode fails with: "java.io.IOException: Invalid HTTP Packet received" when using TCF APIs.

Patch 1473057

You must apply patch 1473067 if you created the database using a non-US7ASCII and non-WE8ISO8859P1 character set.

1473057 NLS enabled JDBC drivers. This is required for non-US7ASCII and non-WE8ISO8859P1 character sets.

Step 2: Performing the Post Install Steps

There are several post install steps that you need to perform after installing the patches listed in Step 1: Installing any Required Patches. These steps are described in this section.

Caution: If you have installed the TCF server on an IBM AIX machine, then you **must** perform the steps listed in the AIX Port Instructions section.

Post Install Steps

The patches described in section Step 1: Installing any Required Patches contain both client and midtier Java code. After applying any of these patches, perform the following steps:

1. Stop and start the TCF server. The TCF server does not pick up the latest code until it is bounced.
2. Close the browsers on the client machines.
3. Clear out the JInitiator jcache directory on the client machines.
4. Restart the client browsers. You must do this to force the regenerated jar files to be downloaded after you apply the patch.

AIX Port Instructions

If the TCF server is installed on an IBM AIX machine, then you must also do the following:

1. Perform the port specific instructions provided in the JDBC 8.1.6 Release notes. These Release Notes can be found on Metalink, note 114464.1.

   In addition to the environment variables specified in the JDBC release notes, you **must** update adovars.env with the following environment variable:

   ```
   <JAVA_COMPILER>
   ```

   and have it set to

   ```
   <NONE>
   ```

   If you omit this step, then you will encounter the problem described in bug 1510941 which causes the Gantt chart to fail.

2. Shut down the TCF server and restart it to force these changes to take effect.

Step 3: Configuring the Servers

WARNING: Setting the communication protocol correctly is extremely critical. If this step is performed incorrectly, the client/server communication will not work.

In order for the TCF server and client to establish a connection over the network, you should set up the following using the **same** communication protocol.

- Forms servers
- File appsweb.cfg
- TCF servers

The following table lists the valid communication protocols that you can use in setting up and starting the Forms and TCF servers.

Communication Protocols

Forms Mode	TCF Protocol
http	HTTP

Communication Protocols

Forms Mode	TCF Protocol
https	SSL
socket	SOCKETS

Forms Servers

When you start the Forms server from the command line (on UNIX), you must include the Forms "mode" argument:

```
f60ctl { start | stop } port=port_num pool=pool_num log=log_file
mode={http|https|socket} exe=exe_name
```

Valid Forms modes are:

- http
- https
- socket

File appsweb.cfg

Modify the appsweb.cfg file (usually found under $APPL_TOP/html/bin) so that it includes the following:

```
connectMode=<protocol>
```

The connect mode parameter **must** indicate the same protocol as that which you set for the Forms server. Again, valid protocols are:

- http
- https
- socket

TCF Servers

Configure the TCF servers to start and run in the same communication protocol mode as that which you set for the Forms servers and indicated in the appsweb.cfg file.

Configuring the TCF Server Protocol

For details on configuring TCF servers, refer to the *Administering the TCF Server (11i)* documentation for a complete list of the configuration settings. You can access this document on Metalink (Note 123689.1).

Starting the TCF Servers

> **Note:** Oracle Applications provides a script that you can use to start and stop a TCF server. Refer to the *Installing Oracle Applications* guide, section "Review Server Process Control Scripts" for the name and location of this file.

Start the TCF server from the command line (on UNIX) using the following arguments:

```
jre oracle.apps.fnd.tcf.ServerControl [START|STOP|STATUS|UPDATE]
<portnumber|default=10021> [<param=value>]
```

Valid parameters are listed and described in the previously mentioned *Administering the TCF Server (11i)* documentation.

Note the following:

1. Oracle strongly recommends that you start the TCF server with the PROTOCOL parameter set to the same value that you set for the Forms mode argument, as described in the Forms Servers section.
2. The DBC file parameter is **required**.
3. At server start up, the TCF:HOST and TCF:PORT profile options are updated with the information passed into ServerControl.
   a. If the TCF server is started using HTTP protocol, then the TCF:HOST profile is prefixed with "http://".
   b. If the TCF server is started using SOCKETS protocol, then the TCF:HOST profile is set without the "http://" prefix.

Step 4: Verifying the Server Configurations

The following table lists the steps involved in verifying that the servers are configured correctly.

Steps to Verify Server Configuration

Step	Action
❑	4a. Verify that the mandatory setup steps were performed correctly.
❑	4b. Verify the TCF Host Name and Port Number.
❑	4c. Verify the TCF Connection
❑	4d. Verify that Resources Exist in the System.
❑	4e. Verify that the Assignment Manager is set up correctly.

Each of these steps is described in detail in the following sections.

Step 4a: Verify Mandatory Setups

Verify that you have correctly performed all the steps listed in the previous sections:

- Step 1: Installing any Required Patches
- Step 2: Performing the Post Install Steps
- Step 3: Configuring the Servers

If necessary, repeat any steps that were not performed correctly.

Step 4b: Verify TCF Host Name and Port Number

Perform the following steps to verify that the TCF host name and port number have been set correctly.

1. Log in to your Personal Home Page (PHP) and select the Application Developer responsibility.
2. In the Navigator, select **Application > Menu**.

   The Menus window opens.
3. Select **Diagnostics > Examine** from the Help menu.

   A password protect dialog box opens. Enter a valid password. If necessary, contact your system administrator for a valid password.

   After the password is authenticated, the Examine Field and Variable Values window opens.
4. Enter the following search parameters:
   - Block: $PROFILES$

- Field: TCF:HOST

The Value field should now display the host name of the TCF server.

a. If the TCF server is started using HTTP protocol, then the host name must be prefixed with "http://." If this is not the case, then one of the following has occurred:

- The TCF server was not started in HTTP mode.
- The SocketServer class was used instead of ServerControl class to start the TCF server.
- The system level TCF:HOST profile has been overridden at the application or user level.
- The system level TCF:HOST profile has been manually changed on the system level.

b. If the TCF server is started using the SOCKETS protocol, then the host name must **not** be prefixed with "http://."

If the ServerControl class (not the SocketServer class) is used to start the TCF server, then it automatically sets the system level profile options. These profile option values can also be set manually at the system / application / user level in Forms through the Profile menu, using the System Administrator responsibility.

Exercise extreme caution if you manually change these values. Setting these values incorrectly may cause the Oracle Applications client code to not be able to establish a connection to the TCF server.

5. Perform a new search, changing the value of Field to TCF:PORT.

The Value field should reflect the number of the port on which the TCF was started.

Step 4c: Verify the TCF Connection

Using the Menu Tree Viewer, perform the following steps to verify that the TCF connection is working properly:

1. Log in to your Personal Home Page (PHP), if you are not already there, and select the Application Developer responsibility.

2. Select **Application -> Menu**.

3. Query up the JTF_NAVIGATE Menu item.

a. Select **View > Query by Example > Enter**.

b. Enter JTF_NAVIGATE in the Menu field.

c. Select **View > Query by Example > Run**.

The Menus window populates with information.

4. Click **View Tree**.

You should see a tree like structure that corresponds to the Navigator hierarchy for the CRM Administrator responsibility.

For information on TCF connection problems, see Can Not Connect to the TCF Server in the Troubleshooting Gantt section.

Step 4d: Verify Resources Exist

Perform the following to verify that resources are available in the system.

Note: Refer to the *Oracle CRM Application Foundation Concepts and Procedures*, and the *Oracle CRM Application Foundation Implementation Guide* for details on setting up and configuring the Resource Manager.

Log in as the APPS user using SQL*Plus and run the following SQL statement. This will return the resources you can use to query up in the Assignment Manager: Unassisted Mode:

```
SELECT jtf_task_utl.get_owner(r.resource_type ,r.resource_id)
       resource_name
      ,r.resource_id
      ,r.resource_type
      ,o.name -- This is a descriptive name of the resource type
FROM ( select resource_id
      ,decode(category,'EMPLOYEE','RS_EMPLOYEE'
      ,'PARTNER','RS_PARTNER'
      ,'SUPPLIER_CONTACT','RS_SUPPLIER'
      ,'PARTY','RS_PARTY'
      ,'OTHER','RS_OTHER') resource_type
FROM jtf_rs_resource_extns) r
      ,jtf_objects_vl o
      ,jtf_object_usages u
WHERE r.resource_type  = o.object_code
AND o.object_code      = u.object_code
AND u.object_user_code = 'RESOURCES';
```

The result of running this query is a list of the defined resources that you can use to verify that the Gantt chart is set up correctly.

Step 4e: Verify the Assignment Manager Setup

Perform the following steps to verify that all the installation and setup steps for the Oracle CRM Application Foundation Assignment Manager have been performed correctly.

> **Note:** Refer to the *Oracle CRM Application Foundation Concepts and Procedures*, and the *Oracle CRM Application Foundation Implementation Guide* for details on setting up and configuring the Assignment Manager.

1. Log in to your Personal Home Page (PHP) and select the CRM Administrator responsibility.
2. In the Navigator menu, select **Task and Escalation Manager -> Manage Escalations**.
3. Enter anything into the Escalation Summary field.
4. Click **Assign**.

   The Assignment Manager window opens.
5. Ensure that the **Unassisted** radio button is selected.
6. In the Resource Partial Name field, enter the first few letters from one of the names returned by the SQL statement in the previous section (Verify Resources Exist) and suffix the name with a percent "%" character.
7. Click **Search**.

   - If the Gantt and TCF servers are working and have been set up properly, then you will see the resource name at the left side of the Gantt chart. If the Calendar is defined correctly, then you may also see Shifts (yellow background color) and Tasks (blue and red bars).

     For a task to be visible, it must have been previously created, and have a scheduled start/end date that falls within the visible time range, and be assigned to a resource.

- If an "APP-JTF-210807: No Resources Found. Please Try Again." message is returned, then you have entered a name that does not exist, or alternatively there may be a problem in Assignment Manager.
- If nothing is returned, check the JInitiator Console Window for exceptions.

Troubleshooting Gantt

This topic group provides information on common setup and configuration problems associated with the Gantt chart, and information on how to resolve these issues.

This section covers the following topics:

Common Issues

In general, problems with the configuration and setup of the Gantt chart fall into the following categories. They are:

- Gantt chart does not appear
- Can not connect to TCF Server
- No resources are visible

Resolution

If you are experiencing problems with the Gantt chart, then do the following:

1. First perform the steps listed under General Advice.
2. If this does not clear up the problem, then see the individual sections for the listed problems.

General Advice

The following items are general suggestions to follow in troubleshooting problems relating to the Gantt chart.

1. Clear out the JInitiator jcache directory, close and restart the browser, and try again. Old, cached JAR files may be causing the problem.
2. Shut down and restart the TCF server. If a patch has been applied, then the new code is not picked up by the runtime engine until the TCF server is restarted.
3. Check the JInitiator Console Window for exceptions or informational messages. You can activate the Console Window by selecting the "Show Console" check box in the JInitiator Control Panel. You must then close and restart the browser.
4. Ensure that there are no invalid objects in the database. You can use the *adadmin* utility for this purpose.
5. If an invalid object is found, correct the problem, then make sure that the offending form is recompiled (along with its libraries). This can be done also through the *adadmin* utility.
6. If problems continue, then perform the steps listed in the following sections as appropriate:
   - Gantt Chart Does Not Appear
   - Can Not Connect to TCF Server
   - No Resources Are Visible

Gantt Chart Does Not Appear

One of the most common problems is that a Form does not display the Gantt chart properly. This can be in the form of one, or both, of the following symptoms:

1. The Form displays an empty blue or gray area where the Gantt chart should reside.
2. The JInitiator "Console" Window throws a ClassNotFoundException, referring to classes in oracle.apps.jtf.gantt.

Causes

The following are some of the possible causes for this condition:

1. jtfgantt.jar has not been downloaded onto the client machine. The JInitiator console window **must** include a line similar to the following:

```
Opening http://<serverHost>/OA_JAVA/oracle/apps/jtf/jar/jtfgantt.jar no
proxy
```

It should **not** read:

```
Unable to contact http://<serverHost>/OA_JAVA/<some path>/jtfgantt.jar
```

2. Class files are missing from jtfgantt.jar or fndlist.jar.
3. An old version of jtfgantt.jar resides in the JInitiator jcache directory.
4. appsweb.cfg has been customized and does not include an entry for /OA_JAVA/oracle/apps/jtf/jar/jtfgantt.jar.
5. The appsbase.html file, or the HTML page used to launch applications, has been customized and does not pick up the archive tag from appsweb.cfg.

Actions to Take

1. Clear out the JInitiator jcache directory on the client and restart browser.
2. Verify that jtfgantt.lst is included in fndlist.jar.
   a. First take a copy of fndlist.jar, then rename it to fndlist.zip, and use Win Zip to open the file.
   b. Verify that jtfgantt.lst in fndlist.jar lists approximately 26 class files.
3. Perform the actions described in step 2, but for jtfgantt.jar and verify that it contains the files listed in jtfgantt.lst.
4. Ensure that the JInitiator console window does not list any class files as being individually downloaded.

   If this is the case something is wrong in the installation. Class files should be downloaded within JAR files and nowhere else.
5. If Actions 2 through 5 do not verify properly, then perform the following additional actions:
   a. Force the regeneration of the FND and JTF JAR files through the *adadmin* utility.
   b. Restart the Forms (web) listener and the Forms server. Clear out the JInitiator cache directory, and restart the browser.
   c. Try Actions 2 through 5 again.
6. **Critical!** Ensure that all high priority FND (AOL) patches as listed in Metalink have been applied.

7. For the items listed as 4 and 5 under Causes in this section, launch the applications. In Netscape Navigator, select "View Source" and verify that /OA_JAVA/oracle/apps/jtf/jar/jtfgantt.jar is included in the archive tag.

   If it is not included, then add the entry to files appsweb.cfg and appsbase.html.

Cannot Connect to TCF Server

Note: If you are unable to establish a TCF connection, then there may be a generic TCF setup problem. Contact your System Administrator or Oracle Support representative to resolve the issue. Until this issue is resolved, Gantt will not work properly.

The Menu and View Tree forms are owned by the Oracle Application Object Library (AOL). It may be that this is an issue that needs to be resolved within that context.

There are several different errors that one might encounter when attempting to connect to the TCF server, and several different reasons each error might occur.

However, in general, there are three basic types of errors that can affect server connection:

- The client application is unable to connect to the TCF server.
- The TCF server is unable to connect to the database.
- The application hangs upon connecting to the TCF server.

Each type of error is discussed in the following sections.

Unable to Connect to the TCF Server

The standard error message for this is:

"**The application was unable to establish a network connection with the TCF SocketServer listening on port: <port> on host: <host>. Please contact your system administrator.**"

The exact message may vary slightly between versions and products.

You may also see the following:

"**Unable to connect to dispatcher.**"

Things to check:

- Was the TCF server ever started?

  The system administrator should be able to check if the process is running.

- What host and port names were used to start the server?

  Make sure that the profiles TCF:HOST and TCF:PORT on the client point to the TCF server to which you are trying to connect. The best way to check them is to use the **Help > Diagnostics > Examine** utility to check profiles just before launching the TCF application. Make sure that you check the user-level profiles, also, not just the site-level profile options. See Step 4b: Verify the TCF Host Name and Port Number for details of this process.

- Is the TCF server host machine accessible from the client?

  Try to TELNET to the host to see if it is reachable.

Unable to Connect to the Database

The standard error message for this is:

"**The TCF SocketServer running at <host>:<port> was unable to make a JDBC connection to database <dbname>. This may reflect heavy load on the system, or a problem with the indicated database. If this problem persists, please contact your system administrator.**"

You may also see the following:

"**Unable to set context.**"

Things to check:

- Is there a ClassNotFoundException or OutOfMemoryError raised?

  Check the server logs to see if either of these errors occurred. Sometimes a ClassNotFoundException or a OutOfMemoryError is raised while the server is attempting to connect will result in this error. The former are usually configuration issues, the latter suggests that you might want to start your TCF server with more memory.

- Is the database actually up?

  Try connecting from SQL*Plus to verify.

- Are you connecting using DBC files?

  For release 11.5 versions and above, it is now required that DBC files be used to connect to the database. The TCF server must be started with a new argument

"DBC=", pointing to a .dbc file that should be located under $FND_TOP/secure. This command should read:

```
jre oracle.apps.fnd.tcf.SocketServer <port#> DBC=$FND_TOP/secure/xxx.dbc
```

It's important that the path to the .dbc file be specified. Because the TCF server can connect to multiple databases, it doesn't depend on the specific .dbc file you pass in, rather it relies on the path where those .dbc files are located to look up multiple .dbc files.

If the TCF server is not started with the DBC argument or it cannot find the .dbc file in the specified directory, this type of error might occur. Remember that the TCF server may be looking for a different .dbc file than that with which you started it. Check the server logs and see if it reports any errors while trying to load the .dbc file.

- Are the DBC files properly formatted?

  A similar type of error can also occur if the .dbc file was improperly formatted.

  A very common error to see on the server when this happens is:

  ```
  ld.so.1: ... libocijdbc8.so: open failed: No such file or directory
  (libocijdbc8.so)
  ```

  This indicates that the server is attempting to use the THICK JDBC drivers to the database, which is not supported. You need to make sure the .dbc file specifies that the THIN drivers be used. The .dbc should contain the line:

  ```
  APPS_JDBC_DRIVER_TYPE=THIN
  ```

  The .dbc file also needs to contain the following variables that identify the database to use:

  ```
  DB_HOST=
  DB_PORT=
  DB_NAME=
  ```

  These variables correspond to the database information in the tnsnames files. The THIN drivers cannot use the TWO_TASK to resolve the database name, you must provide this information explicitly. (The DB_NAME is actually optional if the TWO_TASK variable and database SID are the same, but it's good practice to use it, in any case.)

Application Hangs Upon Connecting to the TCF Server

Make sure you try connecting using the ServerControl class if hanging problems are reported. If it still hangs, then typically this indicates one of the following:

1. There is a bug in the code, or that there is an environment setup problem.

   Check the debug output on the server to see if there's anything obvious that needs to be corrected, and check the bug database to see if this type of problem has been previously reported.

2. The wrong protocol was used to establish the connection.

   Ensure the TCF server is speaking the same protocol as the client. Supported protocols are SOCKETS, HTTP, and SSL. The client must use the same protocol as the Forms server.

3. The TCF server attempts to exit the loop in which it accepts connections from the client, but does not really do so.

   This type of error is probably the most common. In 11.5.2 and above, if the TCF server stops accepting connections from the client, then it closes the socket and exits immediately.

   Unfortunately, this does not explain why the TCF server stopped accepting connections in the first place. Determining the reason is a more involved process. One very possible reason is the TCF server ran out of memory. The most useful thing to do in this case is to check the debug output and see if any errors have been logged.

No Resources Are Visible

If you experience problems with the proper display of resources in the Gantt chart, then perform the steps listed in the following table.

Trouble Shooting the TCF Server

Tip	Description
View the JInitiator Console Window error messages.	View the JInitiator Console Window error messages and the exceptions thrown.
Consult the TCF server log file.	View the TCF server log file for relevant information.
Verify the TCF server status	Use the ServerControl class to check whether or not the TCF server is accepting connections on the host and port on which it was started.

View the JInitiator Console Window Error Messages

The single most useful thing that you can do to do to troubleshoot server problems is check the JInitiator Console window on the client machine. Some debug information is output by default, and errors raised here are often very descriptive and give a good indication of what the problem is.

If that window is no longer available, then restart the browser, set the "Show Console" check box in the JInitiator control panel, and restart the application.

The items listed below are a few of the exceptions that can be thrown, and reported in the JInitiator Console window.

1. **java.net.ConnectException: Connection refused**

   Usually this means that the TCF server is not running, or that the TCF:HOST / TCF:PORT profile options are pointing to a wrong server or port.

2. **Gantt TCF HOST:<http://hostname> PORT:<port#>**

   This refers to the TCF:HOST/PORT settings passed into the Gantt chart.

   As described in Step 4b: Verify the TCF Hostname and Port Number:

   - If the host name is prefixed with "http://", then the client attempts to connect to the TCF server using the HTTP protocol.
   - If this prefix is missing, then the client attempts to contact the server using the SOCKETS protocol.

   Caution: If the TCF server and client do not use the same mode, then the client will not be able to establish a connection.

3. **gantt: tcfSetAppsContext <filename>.dbc**

   The <filename> listed in the error must exactly match the dbc filename that was specified in the DBC parameter when starting the TCF server. If this is not the case, then rename the file to match that specified in the DBC parameter.

4. **java.lang.ClassNotFoundException:javax.net.ssl.SSLSocket**

   The client side SSL libraries are meant to be included with JInitiator. However, in some older versions of JInitiator, this did not happen due to US export restrictions that have since been lifted.

If this exception occurs, then you must install the latest version of JInitiator (1.1.7.32 or higher). If you have access, then download from technet.oracle.com. If necessary, contact Oracle Support for help with this step.

5. j**ava.io.EOFException .... < 3-5 lines of text> at oracle.apps.fnd.tcf.net.SocketServerConnection.readBigUTF(SocketServerConnection.java)**

   This exception usually occurs after the client tries to connect to the TCF server using the wrong communication protocol. The message indicates that the TCF:HOST profile is not set correctly. Refer to Step 4b: Verify the TCF Hostname and Port Number for details.

6. **gantt: addbar failed, resource not found (<Resource Type> - <Resource Id>)**

   One common cause for this exception is described in bug 1414546, which is dependant on Calendar bug 1415863 for resolution. If this is the case, then ensure that the resource does not have a Calendar Exception assigned that spans the entire duration of a shift.

7. **java.net.UnknownHostException: <host>**

   This exception is thrown when the TCF:HOST profile is set to a server that is not recognized by the client.

   Verify that the TCF:HOST profile is set correctly, and that the client machine can access the server using the <host> displayed in the exception.

   One way to check is to open a DOS window (on a Windows machine) and type in "ping <host>." If the host is inaccessible from the client, then the response returns a "Bad IP address <host>" message.

Consult the TCF Server Log

You can view the TCF server log to obtain further information. To set up the log file for automatic logging, perform the following steps:

1. Add the following to the command line:

   ```
   OUTPUTFILE=/tmp/<logfile>.log LOGLEVEL=STATEMENT
   ```

2. Bounce (stop and restart) the TCF server.
3. Run the application again.

4. Check the log file to see if there is anything in the log file that may indicate what the problem may be.

If you see the following:

```
java.lang.NullPointerException
at oracle.jdbc.oracore.OracleTypeNUMBER.unpicklerec(Compiled Code)
at oracle.jdbc.oracore.OracleType.unpicklerec(Compiled Code)
at oracle.jdbc.oracore.OracleTypeCOLLECTION.unpicklerec(Compiled Code
at oracle.jdbc.oracore.OracleTypeCOLLECTION.unpickle(Compiled Code)
at oracle.jdbc.oracore.OracleTypeCOLLECTION.unpickle(Compiled Code)
at oracle.jdbc.oracore.OracleTypeADT.unlinearize(Compiled Code)
at oracle.sql.ArrayDescriptor.length(Compiled Code)
at oracle.sql.ARRAY.length(Compiled Code)
at oracle.sql.ARRAY.getArray(Compiled Code)
at oracle.apps.jtf.gantt.server.GanttDataServer.getShifts
```

This may be due to bug 1510941. View the AIX Port Instructions, in the Step 2: Performing the Post Install Steps section for details on how to correct this problem.

Verify the TCF Server Status

You can also use the ServerControl class to check whether or not the TCF server is accepting connections on the host and port on which it was started.

To do this, log on to the machine where it was started and run:

```
jre oracle.apps.fnd.tcf.ServerControl STATUS <port#>
```

One of the following may occur:

- If the result is some variant of "Unable to connect," the server most likely was not started properly. See: Unable to Connect to the TCF Server and Unable to Connect to the Database for details of how to solve this problem.
- If the application hangs upon connecting, the server has stopped accepting connections for some reason and must be bounced. See: Application Hangs Upon Connecting to the TCF Server.
- If you are able to connect from the ServerControl but not from an application, it might be an application-specific problem, or it may be that the client JAR files are not set up correctly.

Glossary

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Account adjustment

An adjustment to a subledger account, made via journal entries.

Acknowledgment

A token response, indicating that a given request was received.

Acquirer

A financial institution that establishes an account for a merchant and processes credit card payment authorizations and payments.

Action

A user-initiated step taken to resolve an incident.

Activity

Any data change—including customer, administrator, or system events—that the system can log for reporting purposes or to trigger e-mail notifications.

Examples of activities:

- User login
- Customer payment of a bill
- Data upload

Activity logger

The component of the application that records all activities—including customer, administrator, or system events—for use in reporting and e-mail notifications. See activity.

Adapter

Mediation layer provided by Service Delivery Platform to interface with various network elements.

Adapter type

Different kinds of adapter provided by Service Delivery Platform.

Address

A physical location for a customer or a contact.

Adjusted pipeline

The amounts for the latest, committed opportunity-level forecast. The amounts displayed are the amounts committed by the user or by the user's subordinates at the opportunity level.

Advertisement

In iMarketing, an advertisement is a campaign without an offer attached to it.

Advertiser

In iMarketing, an advertiser is an affiliate that displays a merchant campaign (promotion, survey, ad, event) on its site. Advertisers can be subsidiaries, suppliers, channel partners, ad networks, portals, and so on.

Affiliate

In iMarketing, affiliates are third parties (subsidiaries, suppliers, channel partners, ad networks, and so on) that participate in the merchant's campaigns. Two types of affiliates are publishers and advertisers.

Aging

In accounting, the activity associated with the amount of time that a customer claim is unresolved. Claims with comparatively long periods of aging represent funds that are inaccessible or cannot be accurately measured.

Alphanumeric number type

An option for numbering documents, employees, and suppliers where assigned numbers can contain letters as well as numbers.

Alternate unit of measure

All other units of measure defined for an item, excluding the primary unit of measure.

AMPS

Advanced Mobile Phone Service. An analog cellular voice communication system that operates in the 800 MHz range.

ANSI

American National Standards Institute, which establishes national standards for the United States and serves as the North American representative to ISO (International Standards Organization). The parent organization for X12.

AOL

Applications Object Library.

API (Application Programmable Interface)

A set of procedures that import or export information between an application and an operating system or other system program.

Application building block

A set of tables and modules (forms, reports, and concurrent programs) that implement closely-related entities and their processing.

Approve

An action you take to indicate that you consider the contents of a purchasing document to be correct. If the document passes the submission tests and you have sufficient authority, Purchasing approves the document.

Asset category

Assets may be grouped by category. All assets in a category share the same asset cost accounts and depreciation accounts for each depreciation book.

Asset hierarchy

Assets can be grouped and placed in a hierarchy of larger groups. For example, computers can be grouped for each floor of a building. The floor groupings can then be grouped into one logical grouping of computers for the whole building. The hierarchy would consist of all computers in the building at the top as a parent to each floor grouping of computers. Each floor grouping is a parent to the individual computers.

Asset hierarchy batch

Any changes made to a hierarchy are recorded in a batch that, when applied, will make the changes in your financial books.

Asset hierarchy node

A node represents a logical collection of assets. Several logical groupings (nodes) can be placed in a hierarchical structure, with the asset records serving as children of the lowest level logical nodes. Each node can have only one parent but can have many children.

Asset hierarchy purpose

An asset hierarchy purpose provides a justification for building an asset hierarchy that serves some useful accounting purpose. At least one asset hierarchy rule must exist before a purpose can be created. An asset hierarchy purpose is required to build a hierarchy.

Asset hierarchy rule

An asset hierarchy rule determines the values of attributes for nodes in the asset hierarchy.

Asset item

Anything you make, purchase, or sell including components, subassemblies, finished products, or supplies, which carries a cost and is valued in your asset subinventories.

Asset status

A user-defined field. This field may be used to search for an asset in the Find Assets window. This field also affects Mass Additions, Mass Transfers, and Batch Transfers.

Asset subinventory

A subdivision of an organization that represents either a physical area or a logical grouping of items. An example is a storeroom where quantity balances are maintained for all items and values are maintained for asset items.

Attachment

A file of any type that is associated with a value such as a customer site, a to do, or an opportunity. An example is a contract created in a word processing file that is attached to a customer.

Attribute - Oracle Provisioning

A type identifier.

Attribute, profile

A name-value pair that identifies one of the pieces of information the system asks the user to provide about him- or herself for a user profile. Examples of profile attributes: State, FavoriteColor.

There are two types of profile attributes:

- Generic: The attribute is used with all users of that profile type.
- Conditional: The attribute is used with a subset of the users of that profile type that meet a given condition.

Authentication

An electronic security scheme that requires a user to enter a user name and password to view certain files or open certain parts of a user interface.

Authorization

The validation of access rights. Authorization uses authentication and evaluation of constraints to process a request.

Autopay rule

Automatic payment rule. A rule in the database, set up in advance by the customer, that prompts the system to automatically pay the bills sent to that customer by a particular biller.

The customer can specify, for a given biller:

- The amount of payment

- The date on which to pay the bill
- The payment instrument to use

When such a rule is established, the system automatically pays all of that biller's bills without intervention from the customer until the customer changes the rule.

Autopayment

The automatic payment of bills according to autopay rules set up by the customer.

Availability matrix

A table containing information on the availability of software products. It covers the various versions of a product classified by platform, with their respective release dates.

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Back end payment system

An application used by a biller site to process payment requests for a specific kind of payment method. For example, one payment system might handle certain kinds of credit card payments, while another payment system handles only financial institution (bank) account transfers.

Example of payment systems: CyberCash, Check Free, Verifone.

See financial institution payment system and credit card payment system.

Backflush operation

A routing operation where you backflush component items.

Backflush transaction

A material transaction that automatically issues component items into work in process from inventory when you move or complete the assembly. Also known as post-deduct or pull**.**

Bank account transfer

See financial institution account transfer.

Bill of material

A list of component items associated with a parent item and information about how each item relates to the parent item. Oracle Manufacturing supports standard, model, option class, and planning bills. The item information on a bill depends on the item type and bill type. The most common type of bill is a standard bill of material. A standard bill of material lists the components associated with a product or subassembly. It specifies the required quantity for each component plus other information to control work in process, material planning, and other Oracle Manufacturing functions.

Bill-to address

The customer's billing address. It is also known as **invoice-to address**. It is used as a level of detail when defining a forecast. If a forecast has a bill-to address associated with it, a sales order only consumes that forecast if the bill-to address is the same.

Bill/routing reference

A bill or routing you assign to non-standard discrete jobs. You use the bill reference to create the material requirements for the job. You use the routing reference to create the routing for the job.

BOM

Bill of material

BOM item type

An item classification that determines the items you can use as components in a bill of material. BOM Item types include standard, model, option class, and planning items.

Bonus

Incentive compensation typically paid for meeting a goal, including quantitative and qualitative goals.

Booked date

The date that an order is booked, signifying that the order is firm and includes all the information necessary to be processed through its order cycle.

Browser

See web browser.

Bug

A product defect or failure. Failure may be exhibited as an outage, incorrect or undocumented behavior, inaccurate documentation, or performance degradation.

Bundle sequencing

Sequencing of different bundles in an order. One bundle cannot continue until an earlier bundle completes.

Bundles

Collection of line items of an order.

Business application

Software that performs a particular business function or group of functions (accounts payable, for example).

Business document

A document used for conducting business between two trading partners—a purchase order or invoice, for example.

Business process

Business rules for the type of support, such as field or help desk.

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C

Calculator

A database that uses the data collected by the collector to calculate a compensation payment.

Campaign

A marketing activity that is displayed on merchant or affiliate web sites. A campaign can be a promotion, an advertisement, a survey, an event, or a publisher's ad.

Capture

Phase in the payment process when funds are transferred from the customer's account to the payee's account for an already authorized transaction.

Certification matrix

A table containing certified information of the availability of software products. It covers a range of platforms and products and their respective versions, and clarifies which combinations do or do not work together.

Channel

A unique route from Service Delivery Platform to the Network Element via a Service Platform Delivery Adapter.

Classification

A classification of the type of business area that an account or opportunity is interested in. This can be anything—such as a type of product, a technology, or a business sector. Classifications are created for you by your system administrator.

Classification rules

A user-defined set of rules used to classify a sales transaction.

Clawback

The amount of compensation credited for a sale that is taken back when the invoice due date grace period is exceeded.

CLEI code

Common Language Equipment Identifier code. A 10-character code identifying telecommunications equipment in a uniform, feature-oriented language.

Client

A software application (such as a browser) that requests services, data, or processing from a server or from another application.

CLLI code (also CLLIA, CLLIZ)

Common Language Location Identifier code. An 11-character code identifying and describing buildings, non-buildings, equipment locations, and related job functions.

Close date

The date by which you expect your prospect to make a purchase decision. Close date determines the period for which an opportunity is forecasted.

Close reason

The reason an opportunity is no longer active. An opportunity closes because it turns into a sale, is lost to a competitor, or is not a viable.

Code

A unique identifying number used anywhere a unique identifier is required, for example, event code, advertisement code, letter code, and so forth. Your system administrator determines if code is user- or system-generated.

Collection

The process of collecting transactions from feeder systems into the application.

Collector

A database that collects the data required to pay compensation.

Column headings

Descriptions of the contents of each column in the report.

Committed amount

The amount you agree to spend with a supplier.

Compensation plan

A collection of plan elements used to calculate a compensation payment. One compensation plan is assigned to a salesperson for a given period of time. See source document or source transaction.

Compensation rate

A multiplier on net sales credit. Rate is determined by level of quota achievement, as defined in a rate table.

Compensation transaction

The smallest logical unit of data on which a compensation payment can be calculated. Each transaction comprises several *attributes*, some of which can be user-defined during implementation.

Competitor

A company that competes with your enterprise.

Component

A serviceable item that is a part or feature in another serviceable item. Your customers cannot report service requests against this type of serviceable item directly. You can reference components when you enter service requests against actual end item-type serviceable items, or products. For example, if you define three inventory items, A, B, and C, where A and B are products (end item-type serviceable items) but C is a component (non-end item-type serviceable item) of A, you can enter service requests against A and B directly, but not against C. When you enter a service request against product A, you can reference C because it is a component of A.

Component item

An item associated with a parent item on a bill of material.

Computer-telephony integration (CTI)

The practice of using a computer to control one or more telephone and communications functions.

Concurrent manager

Components of your applications concurrent processing facility that monitor and run time-consuming tasks for you without tying up your terminal. Whenever you submit a request, such as running a report, a concurrent manager does the work for you, letting you perform many tasks simultaneously.

Concurrent process

A task in the process of completing. Each time you submit a task, you create a new concurrent process. A concurrent process runs simultaneously with other concurrent processes (and other activities on your computer) to help you complete multiple tasks at once with no interruptions to your terminal.

Concurrent queue

A list of concurrent requests awaiting completion by a concurrent manager. Each concurrent manager has a queue of requests waiting in line. If your system administrator sets up simultaneous queuing, your request can wait to run in more than one queue.

Concurrent request

A request to complete a task for you. You issue a request whenever you submit a task, such as running a report. Once you submit a task, the concurrent manager automatically takes over for you, completing your request without further involvement from you, or interruption to your work. Concurrent managers process your request according to when you submit the request and the priority you assign to your request. If you do not assign a priority to your request, your application prioritizes the request for you.

Configuration

A product a customer orders by choosing a base version and a list of options. It can be provided as individual pieces, as a set, or as an assembly (configuration item).

Configuration bill of material

The bill of material for a configuration item.

Configure-to-order

An environment where you enter customer orders by choosing a base model and then selecting options from a list of choices.

Contact

An individual that works for an account.

Coterminous

Setting the same end date for all ordered or renewed service programs.

Coupon

A consumable promotion. This term is based on the analogous use of coupons you find in stores.

Credit memo

A document generated when an invoice is fully or partially reversed.

Credit

Phase in the payment process when funds are transferred from the payee’s account to the customer’s account.

Credit card payment system

A type of payment system that handles certain kinds of credit card payments only. These payment systems communicate with payment processors for credit card payments. They do not require any communications with the Automated Clearing House network. CyberCash is an example of a credit card payment system.

See back end payment system.

Credit receiver

A salesperson who has been assigned sales credit.

Credit type

A salesperson can receive monetary or non-monetary credit. The credit types are user-defined. Examples of monetary types are commission and bonus. Examples of non-monetary types are air miles and holidays.

Crediting transaction

A type of transaction that gives or takes away sales credit after sales credit has been allocated for an invoice transaction.

CTI

See computer-telephony integration.

Current date

The present system date.

Custom fields

Also known as flexfields. Custom fields are available on most screens. A flexfield must be set up by the system administrator, include a custom label for the field, and indicate what type of data is allowed in the field. A key flexfield is indexed, and a search may be conducted against it or data may be sorted by the field in a report.

Customer number

A system-generated number that uniquely identifies a customer or prospect.

Customized plan

A compensation plan for which you have changed the defaults for quota or compensation rates, according to the needs of an individual salesperson.

Customer product

An entity that identifies a serviceable item or customer product. The customer product identifies not only the product and the customer, but also the product quantity, the product's serial number (if the product is under serial number control and has been assigned a serial number), the location of the product, the various contacts, such as service administration, support, and bill-to associated with the product. A customer may have several of the same customer products.

Customer site

A specific area or place, such as a building or a floor on a building, at a customer address. A customer address may have one or more related customer sites.

Cycle counting

An inventory accuracy analysis technique where inventory is counted on a cyclic schedule rather than once a year.

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D

Dashboard

The navigation control panel that is accessible to the user at all times.

Database diagram

A graphic representation of application tables and the relationships among them.

Database view

Provides access to an underlying database table. You do not need to know how the data is stored to use a database view.

Decision maker

A contact having authority to make purchase decisions.

Default plan

A compensation plan that has user-defined default values for plan elements. When you assign a base plan to a salesperson, you can customize values in the plan elements such as the quota, rates, periods, draw amounts, and so forth.

Delayed service order

An order for service against existing customer products. The service order is "delayed" because service is ordered later than the product is ordered.

Dequeuer

Process that processes the items of a queue.

Depot repair

A process used to track items returned by a customer for repair or replacement.

Descriptive flexfield

A field you use to collect information unique to your business. You determine the additional information you need and descriptive flexfield lets you customize your application to your needs without additional programming.

De-support notice

A brief announcement specifying a platform / product / version combination for which regular support will no longer be provided as of a certain date.

DHCP

Dynamic Host Configuration Protocol. A protocol that automatically assigns Internet Protocol (IP) addresses on TCP / IP networks when users log on, thereby reducing configuration time. DHCP centralizes IP address management on central computers that run the DHCP server program.

Dimension

A type of hierarchy.

Direct sales credit

Sales credit directly assigned to a salesperson in a transaction in a feeder system, such as Oracle Order Entry or Oracle Receivables, or a foreign source.

Discount

A reduction of the list price of an item.

Display rule

In iMarketing, a display rule is an object that selects a campaign (from a group of eligible campaigns for the specific customer in the session) at run-time (display time). A display rule can be called from any template, including an iStore template.

Display style

A display style is a template design that specifies how information displays on a web page. For example, you use one display style to display product A on a special sale page, and a different display style to display product A on a page detailing product information.

DMS

Defect Management System.

DNS

Domain Name Server. Server computers connected to the Internet that maintain a database of domain names and their associated IP address numbers.

Domain name

A unique name that identifies an Internet site that points to one specific server.

Do not mail

A check box indicating the exclusion of this account or contact from promotional mailings.

Down stream system

A system that a communication company has to have a link with. It can be a system to provision service, to bill a customer, to register a number for E911, and so forth.

Draw

An advance paid to a salesperson toward future earnings.

Drill down

A term referring to clicking on an item within a screen to open a submenu or another screen.

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E

E-commerce

E-commerce builds on e-business, leveraging the Internet supply chain to shift business from a supply-driven to a demand-driven business model. Internet-based sourcing and requisitioning puts the customer completely in control and facilitates the delivery of products and services. The Internet enables e-commerce to connect and extend the value chain, streamline business processes, lower operational costs, and improve time to market.

e-Commerce is possible through the use of the latest Internet-based applications, which can capture older data in various data storage formats from companies and their suppliers and make it available across current applications.

Electronic payment

Any non paper-based type of payment.

Encryption

The data security practice of scrambling (encrypting) data in such a way that only an intended recipient can decrypt and read the data.

Engineering change order (ECO)

A record of revisions to one or more items usually released by engineering.

Entity

A data object that holds information for an application.

ESN

Electronic Serial Number. A 32 bit binary number that uniquely identifies each wireless phone. For analog systems, the ESN along with the Mobile Identification Number (MIN) comprise the handshake information that identifies each mobile phone. See also mobile number (MIN or MSISDN).

Event alert

An alert that runs when a specific event occurs that you define. For example, you can define an event alert to immediately send a message to the buyer if an item is rejected on inspection.

Expected purchases

Products or services you expect to sell with this opportunity.

Expense subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom where no value exists but the quantities may be tracked.

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Feeder system

An order or billing receivable system that inputs transactions to the database. Example: Oracle Receivables.

Financial institution (FI) payment system

A type of payment system that handles bank account transfers and certain kinds of credit card payments. These payment systems communicate with Automated Clearing House (ACH) networks, credit card systems, or both. See back end payment system.

Financial institution account transfer

A bank account transfer. The direct transfer of funds, for payment, from a customer's financial institution account to a payee's financial institution account.

finished good

Any item subject to a customer order or forecast. See also product.

Flexfield segment

One part of your key flexfield, separated from the other parts by a symbol you choose (such as -, /, or \). Each segment typically represents a cost center, company, item family, or color code.

Forecast

Based upon a sales quota, a forecast of future sales can be entered either by a sales representative or managers.

FTP

File Transfer Protocol. Internet tool to transfer files through the Internet from one computer to another. FTP is used to download files from another computer, as well as to upload files from your computer to a remote computer.

Fulfillment actions

Re-usable functions used to perform pre-defined provisioning tasks. Used as part of the fulfillment of a work item.

Fulfillment element

A unique identifiable physical Network Element / Operational Support System belonging to a fulfillment element type.

Fulfillment procedure

Provisioning Procedure for the fulfillment of service at the fulfillment element.

Fuzzy find

A feature you use to search for a name, address or account for which you are not sure of the exact spelling or wording. Fuzzy find follows a prescribed set of rules to accomplish its search.

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G

Giveback

The payment received for a clawback.

GSM

Global System for Mobile. A digital mobile telecommunications system currently most prolific in Europe and well established in most countries outside the U.S.

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H

Hierarchy

A group of related entities arranged in an inverted tree structure according to rank or successive grades.

Holiday support

An application component that controls the way weekends and holidays affect a payment system's lead time—the time it takes the payment system to process a payment request. Holiday support applies rules to FI payment systems.

Lead time is computed in business days and does not count weekends and holidays. If a payment system's normal lead time is two days, and the payment system receives a request on Friday, the payment may not be processed until Tuesday. Similarly, if July 4 is a bank holiday and the payment system receives the request on July 3, the payment may not be processed until July 6.

Payment systems may have their own customized set of holidays. The payment system may provide a PL/SQL file to use for holiday computation.

HTML

Hypertext Markup Language. A standard format for encoding documents for use on the World Wide Web.

HTML documents may contain text, graphics, references to programs, and references (links) to other hypertext (web) documents.

HTTP

Hypertext Transfer Protocol. The protocol that clients use to issue requests for documents over the Internet.

When HTTP appears at the beginning of a URL, it tells the browser to expect a hypertext document.

HTTPS

A secure version of Hypertext Transfer Protocol (HTTP). HTTPS coexists with HTTP and provides security mechanisms to secure transactions between Web clients and servers.

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ICX

The Inter Cartridge Exchange is an API provided by Oracle Web Server to issue HTTP requests between cartridges.

IMAP

Internet Mail Access Protocol. An Internet protocol that expands on the features of POP, an Internet mail server protocol that provides an incoming message storage system. Like POP, IMAP works in conjunction with SMTP, which moves mail from one system to another. See also SMTP.

IMEI

International Mobile Station Equipment Identity is a unique electronic serial number identifying a particular mobile station.

IMSI

International Mobile Subscriber Identity. A unique number identifying a particular subscriber.

incentive factors

See quota uplift and period.

incentive type

Three types of incentive compose the monetary amount of a compensation payment: commission, bonus, and manual payments.

incident

An entry logged in to record a customer's request for product service. You can log a different incident for each issue a customer reports, including questions about products, problems using the products, requests for preventive maintenance, and requests for service contract renewals.

included item

A standard mandatory component in a bill, indicating that it ships (if shippable) whenever its parent item is shipped. Included items are components of models, kits, and option classes.

indirect sales credit

Credit inherited by a salesperson according to his/her place in the salesperson hierarchy. Indirect credit can roll *up* from a subordinate to a manager, or *across* from a salesperson to a peer.

inspection

A procedure you perform to ensure that items received conform to your quality standards. You can use inspections to prevent payment for goods and services that fail to meet your quality standards.

interest

See interest type.

interest code

A code created by your system administrator for an item or business area that you use to track account, contact, and opportunity interests. Each primary code can have secondary codes, so that you can break your account and contact interests down. For example, you might have one product that is available in more than one version or model. You can create a primary interest code for the product itself and then link it to a number of secondary codes that represent the different versions or models.

interest type

A classification of the type of business area in which a contact is interested. This can be anything—such as a type of product, a technology, or a business sector. Interest types are created for you by your system administrator.

internal requisition

See internal sales order, purchase requisition.

internal sales order

A request within your company for goods or services. An internal sales order originates from an employee or from another process as a requisition, such as inventory or manufacturing, and becomes an internal sales order when the information is transferred from purchasing to order entry. Also known as an internal requisition or a purchase requisition.

inventory transaction

A record of material movement. The basic information for a transaction includes the item number, the quantity moved, the transaction amount, the accounting flexfields, and the date. See material transaction.

issuer

A financial institution that establishes an account for a consumer and issues the payment instrument.

issue transaction

A material transaction to issue component items from inventory to work in process.

item

Anything you make, purchase, or sell, including components, subassemblies, finished products, or supplies.

item attribute control level

To maintain item attributes at the item master attribute level or the organization specific level by defining item attribute control consistent with your company policies. For example, if your company determines serial number control at headquarters regardless of where items are used, you define and maintain serial number attribute control at the item master level. If each organization maintains serial number control locally, they maintain those attributes at the organization specific level.

item master level attribute

An item attribute you control at the item master level as opposed to controlling at the organization level.

item sequence

The sequence of the component item on the bill of material used to sort components on reports.

item specification

See specification.

Item status

Code used to control the transaction activity of an item.

Item type

Entity in Oracle Workflow that identifies a set of business processes.

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J

Java

An object-oriented, portable computer language developed by Sun Microsystems and supported by the Oracle Application Server.

The Oracle Application Server can execute Java directly and send Java programs to a client's browser for execution there.

JBC

JavaBeans cartridge.

K

Key indicators

A report that lists statistical receivables and collections information that lets you review trends and projections. Also, an Oracle Applications feature you use to gather and retain information about your productivity, such as the number of invoices paid. You define key indicators periods, and the application provides a report that shows productivity indicators for your current and prior period activity.

Key site

A site you work with frequently.

Knowledge area

A collection of knowledge objects that pertain to a specific product or other categorization.

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L

Latest commitment

The latest amounts committed by the user or by the user's subordinates at the product category level for Forecast and Upside statuses. 'None' is displayed if no previous commitment was made.

LDAP

Lightweight Directory Access Protocol. A directory service specification that provides *white pages* services for an organization, for example, helping people locate other people or services. A directory service is a database that users can search and manipulate in a number of ways to display information about a network and its resources, or to create and manage user accounts. In Oracle Applications, LDAP refers to the server used for such purposes.

Lead

A potential to sell products and / or services to an account or contact. Leads record the initial interest a customer or prospect has in making a purchase or in evaluating a product for purchase. One contact can generate many leads. One marketing activity can generate many leads. Qualified leads become opportunities.

Life end date (LED)

The date when an asset will be fully depreciated. For example, if an asset with a life of three years is entered into an accounting book on 1 January 2003, then its LED will be 31 December 2005.

Line item

Individual products / services part of an order.

Line item sequencing

Line items that do not depend on the start / completion of any other line item (if any) in an order.

List price

A standard item cost charged to a customer for your product.

Local database

A database that runs on the same machine as the Oracle Application Server.

Locator

Physical area within a subinventory where you store material, such as a row, aisle, bin, or shelf.

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M

Mail merge

A feature of word processing software that lets you personalize a form letter. In general, two files are involved: a *form letter* containing both the text that remains the same and tokens representing information to be personalized and a *merge file* containing database information that replaces the tokens, such as a company name or a contact's name and address.

Mandatory component

A component in a bill that is not optional. Oracle Applications distinguish mandatory from optional components in model and option class bills of material. Mandatory components in pick-to-order model bills are often referred to as included items, especially if they are shippable.

Manual transaction

A user-entered transaction created for reversing or changing sales credit.

Mapping

Rules defining collection that map the table columns of a feeder system to the transaction columns in the application.

Mass change order

A record of a plan to replace, delete, or update one or more component items in many bills of material at the same time.

Mass retirement

A feature that allows you to retire a group of assets at one time. In Oracle Assets, mass retirements may be made through the Asset Hierarchy or through the Mass Transactions menus.

Material transaction

Transfer between, issue from, receipt to, or adjustment to an inventory organization, subinventory, or locator. Receipt of completed assemblies into inventory from a job or repetitive schedule. Issue of component items from inventory to work in process.

Merge file

An operating system file that contains information pulled from the database, for merging into the text of a form letter to personalize it. For example, a merge file might contain name and address information for 15 contacts. When merged into the text of a form letter, it produces 15 personalized letters.

Message set

See OFX message set.

Middle ware

Software that sits between two or more types of software and translates information between them.

Mobile number (MIN or MSISDN)

Mobile Identification Number. The North American standard consists of 10 digits and follows this sequence: "(###) ###-####". The European standard consists of 6 digits and follows this sequence: "## ####". For analog systems, the MIN and the Electronic Serial Number (ESN) comprise the handshake information that identifies each mobile phone. See also ESN.

Model bill of material

A bill of material for a model item. A model bill lists option classes and options available when you place an order for the model item.

Model item

An item whose bill of material lists options and option classes available when you place an order for the model item.

Module

A program or procedure that implements one or more business functions, or parts of a business function in an application. Modules include forms, concurrent programs, and subroutines.

Multimedia

Multimedia consist of files used to present content on a web page to your customer, such as graphics, text, audio, and video.

Multimedia component

Multimedia components define the types of media objects available to display on a web page, such as a certain size picture, short text description, or audio of a certain length.

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N

Name-value pair

Used in HTTP communications to pass data. Name-value pairs may be either *input* or *output*.

Net sales credit

The product of the transaction factor and sales credit, given if a salesperson is eligible. Net sales credit is further multiplied by the compensation uplift to determine compensation credit.

NLS

National language support.

NNTP

Network News Transfer Protocol. The delivery mechanism for the USENET newsgroup service. It provides a way to exchange messages, articles, and bulletins throughout the Internet.

Non-standard discrete job

A type of discrete job that controls material and resources and collects costs for a wide variety of miscellaneous manufacturing activities. These activities can include rework, field service repair, upgrade, disassembly, maintenance, engineering prototypes, and other projects. Non-standard jobs do not earn material overhead upon assembly completion.

Non-standard expense job

A type of non-standard job expensed at the close of each accounting period. Typical expense jobs include maintenance and repair.

Note

A piece of information about a site, opportunity, or contact. A note is either entered by you or generated automatically to record the occurrence of a specific situation such as the receipt of a telephone call from a contact.

Notification

An e-mail message that the system creates and sends automatically to users or other addressees when certain events occur in the system.

Numeric number type

An option for numbering documents, employees, and suppliers where assigned numbers contain only numbers.

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O

Offer rules

Rules used to specify if a promotion applies to a customer during order checkout in a given web site session.

Offline payment processing

The payment processing model in which a payment processing request is not immediately forwarded to back-end payment processors.

OFX

Open Financial Exchange. A framework developed by CheckFree, Intuit, and Microsoft for exchanging financial data and instructions between customers and their financial institutions.

OFX enables institutions to connect directly to their customers or other institutions without requiring an intermediary.

OFX is an open specification that anyone can implement: any financial institution, transaction processor, software developer, or other party. It uses widely accepted

open standards for data formatting (such as SGML), connectivity (such as TCP/IP and HTTP), and security (such as SSL).

OFX message

The unit of work in OFX, consisting of a request and response pair and the status codes associated with that response.

OFX message set

A collection of OFX messages. OFX message sets are the basis for OFX version control, routing, and security. They are also the basis for the required ordering in OFX files.

On hold job/schedule

A job or repetitive schedule that is not accepting further activity and is therefore untransactable.

Online payment processing

The payment processing model in which a payment processing request is immediately forwarded to the back-end payment processor.

Open interface

A manufacturing function that lets you import or export data from other systems through an open interface. An example is a bar code reader device accumulating data you later import into your manufacturing system for further processing.

Open requirement

A Work In Process (WIP) material requirement you have not yet transacted to a discrete job or repetitive schedule. It equates to the component quantity required less any quantity issued.

Opportunity

A qualified sales lead with the potential to bring in revenue. An opportunity has a life span and it eventually closes either because it turns into a sale, is lost to a competitor, or is a bad opportunity. An opportunity is assigned to one or more territories based on a variety of criteria and may be worked on by a single sales representative, by a team of employees, or by a sales partner.

Opportunity item

A line item associated with an opportunity.

Opportunity number

The unique identifying number for an opportunity.

Option

An optional item component in an option class or model bill of material.

Option class bill of material

A bill of material for an option class item that contains a list of related options.

Option class item

An item whose bill of material contains a list of related options.

Option dependent operation

An operation in a model or option class item's routing that appears in a configuration item routing only if the configuration contains an option that references that operation.

Order analyser

PL/SQL (Service Delivery Platform) procedure used to add/delete/modify contents of orders.

Order date

The date an order for goods or services is entered. See also work order date.

Order line number

A number that uniquely identifies a specific line of a sales order.

Order number

A number that uniquely identifies a sales order.

Order type

A classification of a sales order.

Organization

An entity that can conduct business with your company. An organization can consist of multiple sites and may have multiple contacts associated with it.

Organization-specific level attribute

An item attribute you control at the organization level.

Original pipeline

Consists of the actual Opportunity amounts, totaled by Won, Forecast, and Upside statuses.

Outside processing

Performing work on a discrete job or repetitive schedule using resources provided by a supplier.

Outsource service

A company that provides billers with external web-based bill presentment and payment. The outsource service acts as a host for one or more billers' websites.

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P

Packages

Pre-defined collection of products.

Parent node

An asset hierarchy is built using parent/child relationships. A parent node is a logical collection of assets or logical grouping of other hierarchy nodes. An asset record cannot be a parent node. A parent node can have only asset records as children or only hierarchy nodes as children. It cannot have both.

Parameter form

The HTML form that defines the parameters required for a report. For example, if the report you are creating is a list of all customers for a particular biller, the user must be able to enter the name of the desired biller when running the report.

Partition

A feature of the Oracle 8 database that provides a way to support very large tables by allowing you to decompose them into smaller and more manageable pieces. These pieces are called partitions.

After you define your partitions, you can access and manipulate them instead of manipulating the entire table.

All the partitions of a table have the same logical attributes.

Partner

A company acting on behalf of your enterprise that helps close business for you by selling your products.

Pay group

A group of pay periods. It is used to identify the payment cycles of a salesperson. Each pay group may have one or many pay periods.

Pay period

A range of dates over which calculated plan element commissions are collected for payment.

Payee

The company or other entity, such as a biller, that is being paid in a given transaction.

Payee account

The account (typically, a bank account) where the proceeds of all payments to a given payee are transferred.

Payment instrument

A bank account or credit card account that a customer uses for paying bills.

Payment method

A form of payment that a biller accepts for the payment of its bills.

For example, the payment method that National Utility accepts might be credit cards and financial institution account transfers, while Big Bank Credit Card Company might accept only financial institution account transfers.

Payment processing

The process of submitting, authorizing, and returning a payment request and related data.

Payment state, payment status

The status of a payment in iPayment. The five possible payment states are Pending, Scheduled, Paid, Failed, and Canceled.

A payment is Scheduled when any of the following conditions apply:

- The customer has scheduled it
- The system has determined that the payment will be paid by autopayment
- The payment was Failed and a CSR has rescheduled it for payment

A payment is Pending when the customer has scheduled it, but the scheduling system has not sent it to the payment system.

A payment is Paid when it has been completed successfully.

It is Failed when it cannot be paid for any reason, such as insufficient customer funds.

A payment is Canceled when a CSR has canceled it following a customer dispute or when he or she has determined for whatever reason that the payment cannot be rescheduled. Note that a scheduled payment can be canceled as long as the cancellation occurs before it reaches a bank.

Payment system

An application used by a biller site to process payment requests for a specific kind of payment method. For example, one payment system might handle certain kinds of credit card payments, while another payment system handles only financial institution (bank) account transfers.

Example of payment systems: CyberCash, Check Free, Verifone.

See financial institution payment system and credit card payment system.

Payment uplift

A type of incentive, the payment uplift is a multiplier on the compensation rate. The payment uplift varies the compensation payment without affecting quota achievement.

The account (typically, a bank account) where the proceeds of all payments to a given payee are transferred.

Pending

A status where a process or transaction is waiting to be completed.

Pending-iPayment

A payment status in which the customer has scheduled the payment but the scheduling system has not yet sent it to the payment system. See role.

Period

A unit of time, such as one week, two weeks, or a month, on which your accounting calendar is based.

Period target

The target quota amount for a plan element for each period in the compensation plan.

Pipeline

An accumulation of the forecasted opportunity purchase lines that contain a status of Upside or Forecast.

Plan element

Terms defining the conditions a salesperson must meet to be paid compensation and the amount of compensation to be paid. A plan element includes one or more revenue classes, quota, transaction factor, incentives and compensation rate.

Point code

A unique code that identifies a network node so that the SS7 network can route calls properly.

Point of presence (POP)

A location where dial-up phone lines or leased line connections exist for Internet connection to an Internet service provider. Do not confuse with POP (Post Office Protocol).

POP

Post Office Protocol. Do not confuse with point of presence (POP). An Internet mail server protocol that provides an incoming message storage system. POP works in conjunction with SMTP, which moves mail from one system to another. See also SMTP.

Posting

In iMarketing, posting is a campaign that is displayed by publishers or is displayed on advertiser sites (could be driven by a display rule). Posting is usually associated with terms of contract such as the display program, billing rate, effectivity dates, and so on.

PPP

Point-to-Point Protocol. A scheme to encapsulate and transmit Internet Protocol (IP) datagrams over serial point-to-point links. PPP provides router-to-router, host-to-router, and host-to-host connections.

Primary code

See interest code.

Primary routing

A list of the operations you most frequently perform to build a product. The primary routing is the default routing for defining a job and calculating manufacturing lead times.

Privilege

The right or ability to perform an operation in the system.

See role.

Proactive knowledge

Information that is created based on analysis of customer need with the primary purpose of minimizing service requests. Typically, this information can be technical bulletins, white papers, FAQs, alerts, availability matrices, step-by-step instructions, and so forth.

Process

A set of Oracle Workflow activities that need to be performed to accomplish a business goal. See process activity, process definition.

Process activity

An Oracle Workflow process modelled as an activity so that it can be referenced by other processes; also known as a subprocess. See also process.

Process definition

An Oracle Workflow process as defined in the Oracle Workflow Builder. See also process.

Product

A finished item that you sell. See also finished good.

Product catalog

Summarized product information can be searched for and viewed in the product catalog along with any additional files relating to the product.

Product category

A product category is a concatenation of interest type, primary interest code, and secondary interest code, or it is an inventory item description.

Profile option

A set of changeable options that affect the way your applications run. In general, profile options can be set at one or more of the following levels: site, application, responsibility, and user.

Promotion

In iMarketing, a promotion is a specific type of campaign with a discount value. It impacts the price of the item bought, the shipping charge, and the order amount during the checkout process. A promotion is associated with modifiers such as 2% off on the order.

Prospect

A company or other entity that has not yet placed a purchase order with your enterprise.

Protection level

In Oracle Workflow, a numeric value ranging from 0 to 1000 that represents who the data is protected from for modification. When workflow data is defined, it can either be set to customizable (1000), meaning anyone can modify it, or it can be

assigned a protection level that is equal to the access level of the user defining the data. In the latter case, only users operating at an access level equal to or lower than the data's protection level can modify the data.

Proxy server

Proxy server services run on a firewall server at the application level to protect internal resources on networks from other networks, such as the Internet. Proxy server services include controls for Web services and file transfer services.

Publisher

In iMarketing, a publisher is an affiliate that displays its ad on the merchant site. Publishers can be subsidiaries, suppliers and channel partners, ad networks, portals, and so on.

Purchase order (PO)

A document used to buy and request delivery of goods or services from a vendor.

Purchase requisition

An internal request for goods or services. A requisition can originate from an employee or from another process, such as inventory or manufacturing. Each requisition can include many lines, generally with a distinct item on each requisition line. Each requisition line includes at least a description of the item, the unit of measure, the quantity needed, the price per item, and the Accounting Flexfield you are charging for the item.

Purchased assembly

An assembly that you normally buy.

Purchased item

An item that you buy and receive. If an item is also an inventory item, you may also be able to stock it.

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Q

Quantity

The number of items ordered on a sales order line.

Qualified lead

A lead becomes qualified when it appears likely to lead to a sale. Leads can be set to "qualified" by a sales representative, or automatically, if the information in a lead meets criteria preset by the application administrator. For example, a lead can become qualified automatically as soon as a telemarketer makes entries in the Time Frame, Budget and Budget Status fields.

Queue

An intraoperation step in an operation where assemblies are waiting to be worked on, or service requests are waiting for response. The default intraoperation step for every operation in a routing.

Quota

A revenue goal for a sales representative that affects compensation.

Quota achievement

Accumulated performance against a quota that determines the compensation rate.

Quota credit

The product of the net sales credit and quota uplift. Quota credit is added to a salesperson’s quota achievement.

Quota percent

For an expected purchase, the percentage of the amount that you can claim as credit toward your quota. If you enter a value here, the system automatically calculates the Quota Credit.

Quota type

You can choose to view forecasts of actual revenue amounts or non-revenue amounts used for quota credits. Non-revenue amounts are created only for the purposes of sales representative remuneration.

Quota uplift

A type of incentive, the quota uplift is a multiplier on net sales credit, resulting in higher or lower quota credit applied toward the quota.

Quote

A quote is a list of items and prices presented to a prospect. It is created by a sales representative when a contact, agreement, price list, and ship to site have been specified.

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R

Rate bracket

A range of achievement associated with a compensation rate. Also called a rate tier.

Rate table

A structure that associates compensation rates with brackets.

Reactive knowledge

Information created in real time mode based on information contained within a service request. Typically in the form of a product/solution.

Reconciliation

The process by which a payee and it's bank exchange transaction report and match their records.

Reference

A check box that indicates whether a customer, site, or contact is trusted enough to act as a reference to other prospects.

Remaining useful life (RUL)

The remaining accounting periods for which an asset may be depreciated. For example, if an asset is entered into your system with a useful life of five years, then in its third year of service, that asset will have an RUL of two years.

Renewal order

An order containing service order lines to renew or extend existing services applied to products.

Requisition

See purchase requisition and internal sales order.

Return

The process of transfer of funds from the payee's account to the customer's account in which the orderID is available.

Return material authorization (RMA)

Permission for a customer to return items. Receivables allows you to authorize the return of your sales orders as well as sales made by other dealers or suppliers, as long as the items are part of your item master and price list.

Revenue amount

For an expected purchase, each item, the amount you can roll upwards on a revenue forecast.

Revenue class

A user-defined category of business revenue. Revenue classes are assigned to plan elements and help determine if sales credit is applied toward a compensation payment.

Revenue class hierarchy

A hierarchical arrangement of revenue classes and their subclasses in which you define very broad classes at the top of the structure. A revenue class hierarchy makes it possible to pay compensation for a broad revenue class without specifying all its subclasses.

Revenue classification rules

A set of one or more conditions a revenue class must have to classify into a given revenue class.

Revenue percent

For an expected purchase, the percentage of the amount that you can roll upwards on a revenue forecast. If you enter a value here, the system automatically calculates the Revenue Amount.

Revised component

Component changes to an assembly that is a revised item on an ECO.

Revised item

Any item you change on an engineering change order. Revised items may be purchased items, subassemblies, finished goods.

Revised item status

A classification you can use to track and control a revised item's life cycle. Revised item statuses include Open, Released, Scheduled, Hold, Implemented, and Cancelled.

Revision

A particular version of an item, bill of material, or routing.

Revision control

An inventory control option that tracks inventory by item revision and forces you to specify a revision for each material transaction.

Revision quantity control

A condition placed on an item that ensures that you always identify an item by its number and its revision. Certain items require tighter controls than other. For instance, you may want to control the quantities you have in inventory for an item by revision. For another item, you may just want to know the quantities you have on hand across all revisions. You keep track of inventory quantities by revision when an item is under revision quantity control. You keep track of inventory quantities by item when an item is not under revision quantity control.

Risk factor

Information that an electronic commerce application finds fit to use to evaluate risk of the customer.

Risk factor score

A number from 0-100 that assigns a risk value for a risk factor.

Risk formula

A formula that is based on multiple risk factors and used by a merchant to evaluate the risk of the customer.

Risk Management (iPayment)

A new functionality provided by iPayment for electronic commerce applications both for business-to-business and for business-to-consumer models. iPayment includes a number of built-in risk factors and provides the option to the payees to run or not run the risk evaluation for each payment operation.

Risky Instruments Upload Utility (iPayment)

A Java application used to store risky payment instruments.

Role

A group of related privileges.

See privilege.

Roll across

In a hierarchy, nodes at the same level in the hierarchy branches. For example, in a salesperson hierarchy, credit rolls across to one or more of a salesperson's peers who are at the same level in the organization.

Rollup

In a hierarchy, all ancestors of a node. For example, sales credit rolls up the salesperson hierarchy from the direct credit receiver to all salespeople above him in the credit chain.

Rollup territory

A territory without rank or group that represents a region. Your rollup territories can be customer-based, geographically-based, product-based or any combination of these and other factors. Each rollup territory is of a particular territory type and is defined by a set of territory values.

Route sheet

A report that provides full routing, operation, resource, and material requirement details for jobs and repetitive schedules. Typically used to know how, when, where, and who builds an assembly. Also known as traveler.

Routing

A sequence of manufacturing operations that you perform to manufacture an assembly. A routing consists of an item, a series of operations, an operation sequence, and operation effective dates.

Routing revision

A specific version of a routing that specifies the operations that are active for a date range.

Run

An intraoperation step where you move assemblies that you are working on at an operation.

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S

Safety stock

Quantity of stock planned to have in reserve in inventory to protect against fluctuations in demand or supply.

Sales channel

A method used to generate a sales order, such as telemarketing, direct marketing or sales partner. Sales Channels are set up by the administrator using QuickCodes.

Sales credit

An amount of revenue or non-revenue credit awarded to a salesperson. See also indirect sales credit.

Sales credit adjustment

A change in the amount of sales credit assigned to a salesperson by an order or billing system. The change may be retroactive. See also account adjustment.

Sales group

A sales organization within your enterprise that has a manager.

Sales partner

A company acting on behalf of your enterprise helping close business for you by selling your products. Examples of sales partners are reseller or dealer.

Sales rep

A sales representative or salesperson.

Sales rep territory

A sales area that you assign to an employee or team. Your sales rep territories can be customer-based, geographically-based, product-based or any combination of these and other factors. You can also base a sales rep territory on any number of rollup territories such that the sales rep territory automatically inherits the qualifier values of the rollup territories. Each sales rep territory is of a particular territory type within a particular territory group, and has a rank.

Sales stage

A defined step in the sales cycle. Your implementation team defines permissible values based on the sales methodology employed by your sales organization.

Sales status

A defined step in the sales cycle. Your enterprise's implementation team defines permissible values based on the sales methodology employed by your sales organization.

Sales team

A sales team is a group of sales representatives and partners associated with a particular site or opportunity. Members of sales teams can be assigned automatically by the territory assignment program and may belong to different sales groups and reporting hierarchies. Each sales team has at least one sales team leader.

Salesperson

Any entity receiving sales-related incentive compensation including direct salespeople, managers, external agents, distributors, VARs, and customers.

Salesperson hierarchy

A hierarchical arrangement of salespeople in an organization that specifies the relationships between managers and their subordinates.

Scrap

An intraoperation step where you move assemblies that cannot be reworked or completed.

Scrap account

An account that you may use to charge scrap transactions.

Scheduler

The application component that schedules payment requests to back end payment systems and updates the system at regular intervals.

On a regular basis, the scheduler schedules payments and sends and receives payment status updates.

Schema

A collection of database objects associated with a single user or logon account, such as the roles, privileges, views, data files, tables, and tablespaces associated with that account.

Secondary code

See interest code.

Section

You can group products for sale into sections and arrange the sections into a hierarchy. The hierarchy is used to move your customer through your webstore.

Selling price

List price less any discounts.

Serial number

A number assigned to each unit of an item and used to track the item.

Serial number control

A manufacturing technique for enforcing use of serial numbers during a material transaction.

Serialized unit

The unique combination of a serial number and an inventory item.

Service

A benefit or privilege that can be applied to a product. In Oracle Applications, if the items you define are categorized as serviceable items, then you can order or apply service to those serviceable items.

Products offered by carriers.

Service contract

A support license.

Service contract detail

Lines that specify start dates, end dates, product and coverage types.

Service designator

A number or string of characters that uniquely identifies a product or service that a communications service provider has sold to a customer. For example, a phone number or an e-mail address may serve as a service designator.

Service item

An inventory item used to define a service program or warranty. Service items can be recorded against serviceable products. A synonym for serviceable item is a serviceable product.

Service item feature

A particular service component, such as implementation or telephone support, that you include with a service item. When you classify an inventory item as a service type item and enter the service program-related attributes for it, you can list the specific services your service item includes.

Service material

Material used for the repair and/or maintenance of an assembled product.

Service order

An order containing service order lines. Service may be for new products or for existing, previously ordered products.

Service program

A billable service item. Usually a service that customers purchase in addition to a product's base warranty.

Service person

An employee whose function is to provide support and service to customers. Service person is also a synonym for service specialist.

Serviceable item

An inventory item that your organization supports and services, either directly or through the supplier of the item, regardless of who actually manufactures the item. A serviceable item can be an end item, both an end item and a component or part in other end items, or just a component.

Serviceable item class

A category that groups serviceable items. Each class must be of the type Serialized or Non-Serialized. You can group serialized serviceable items in a serialized serviceable item class. You can group non-serialized serviceable items in a non-serialized serviceable item class. A given item may be the member of only one item class at any given time.

Serviced customer product

An entity that identifies a service your customer has recorded against a particular product installation. If you order service against a product, then the application automatically links the product and the service being recorded against the product by creating a serviced customer product. A customer product installation may have more than one serviced product.

Serviced installation

A synonym for serviced customer product.

Servlet

A Java program that runs as part of a network service, typically an HTTP server. It responds to requests from clients. A servlet is commonly used to extend a web server by generating web content dynamically.

SET

The Secure Electronic Transaction protocol. An open standard developed jointly by Visa and MasterCard to ensure the privacy and security of credit card transactions over open networks such as the Internet.

Settlement

A process including capture, voids, returns, and credits.

SLA

Service level agreement

SR

Service request

Set of books

A financial reporting entity that partitions general ledger information and uses a particular chart of accounts, functional currency, and accounting calendar. This concept is the same whether or not the Multi-organization support feature is implemented.

Ship to

The address of the customer who is to receive products listed on the invoice or order.

Ship-to address

A location where items are to be shipped.

SIM

Subscriber Identification Module. GSM (the European Global System for Mobile system) employs signal encryption via the SIM, a programmable smart card that slips into a slot built into the mobile phone handset. The SIM card also provides personal mobility. It contains identification information so all subscribed to services, regardless of the subscriber's location, are available by inserting the SIM card into any accessible GSM mobile phone. See also GSM.

Site

A specific location (address) for a customer or prospect. There can be many sites associated with one customer or prospect.

Sites

A Web site, such as a consolidator site or biller site.

Site code

A system-generated number that uniquely identifies a site.

SMTP

Simple Mail Transfer Protocol. The Internet mail exchange protocol responsible for moving messages from one e-mail server to another. E-mail servers run a message-handling protocol called POP (Post Office Protocol) or IMAP4 (Internet

Mail Access Protocol, version 4). SMTP is like the mail carrier, responsible for transporting mail, while POP and IMAP4 are like the post office, responsible for receiving, storing, and forwarding mail. See also entries for POP and IMAP.

Source document or source transaction

Transactions collected from a feeder system. Examples include orders, invoices, and credit memos. See also compensation plan.

Source line

Source information tracking where an asset came from. This includes information from capital asset and accounts payable systems, as well as information added manually.

Spare part

A synonym for service part. It is an inventory item used without modification to replace an original part during the performance of maintenance or repair to a serviceable item or product.

Specification

Describes the requirements of a product in Oracle Quality. You can define specifications for the key characteristics of the products you produce.

SSL

Secure Sockets Layer. A standard for encrypting data that flows between a browser and a server, commonly used by payment systems for secure transactions.

Standard bill of material

A bill of material for a standard item, such as a manufactured product or assembly.

Standard costing

A costing method where a predetermined standard cost is used for charging material, resource, overhead, period close, job close, and cost update transactions and valuing inventory. Any deviation in actual costs from the predetermined standard is recorded as a variance.

Standard discrete job

A type of discrete job that controls material and resources for standard production assemblies.

Standard item

Any item that can have a bill or be a component on a bill except planning items, option classes, or models. Standard items include purchased items, subassemblies, and finished products.

Standard operation

A commonly used operation you can define as a template for use in defining future routing operations.

Standard unit cost

The unit cost you may use to cost all material and resource transactions in your inventory and work in process system. This cost represents the expected cost for a component or assembly for a specified interval of time. The basis for standard cost may be the cost history, purchase order history, or predicted changes in future costs.

Standard warranty

A standard coverage type bundled with all sales of a particular product.

Start date

The date you plan to begin production of assemblies in a discrete job.

Status

See payment status.

Subassembly

An assembly used as a component in a higher level assembly.

Subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock.

Supply type

A bill of material component field that controls issue transactions from inventory to work in process. Supply types supported by Work in Process include: Push, Assembly pull, Operation pull, Bulk, Supplier, Phantom, and Based on bill.

Support site

A support territory (as opposed to a sales territory).

Supported product

An Oracle product and version combination for which technical assistance and error correction is provided.

System

A grouping of customer products.

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T

Tablespace

An area of a database where a defined group of tables is stored.

Target segment

Defines a group of related customers. A segment may be associated with a set of campaigns. iMarketing checks the segments a customer belongs to, and determines the campaigns eligible for the customer. A segment can be organized hierarchically and can have up to one parent segment. The set of customers in a segment is always a subset of the customers in its parent segment.

Target segment rule

In iMarketing, a conditional statement associated with a target segment.

Target

A revenue goal associated with a single revenue class. Targets do not affect the compensation payment.

Target quota

A revenue goal for a salesperson associated with a plan element. Target quotas do not affect the compensation payment.

Template

Specifications written in HTML that control the appearance and characteristics of an HTML document, such as a web page.

Territory

An artificial aggregation of accounts, contacts, or leads.

Territory group

A territory group is a set of territory types that compete with each other when assigning leads and accounts to employees by territory. For a particular lead or account, access is granted to the employees whose territories rank highest within each territory group.

To move

An intraoperation step where assemblies can either be completed to a subinventory or wait to be moved to another operation.

Total product value

The total product list value less the total product discount value.

Total order value

The total product value plus the total service value.

Total commitment value

The dollar value of a contractual guarantee, with a customer, for future purchases.

Transaction attribute

A single piece of information required to calculate compensation earnings. For example, a salesperson's name or an employee ID.

Transaction date

The date you enter and Oracle Manufacturing maintains for any manufacturing transaction. The date must fall within an open accounting period and be greater than the release date for transactions on a discrete job or repetitive schedule.

Transaction factor

A multiplier on sales credit that determines net sales credit given for each type of transaction.

Transaction manager

A concurrent program that controls your manufacturing transactions.

Transaction worker

An independent concurrent process launched by a transaction manager to validate and process your manufacturing transactions.

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U

Unit of measure (UOM)

The unit in which the quantity of an item is expressed.

Unit of measure class

A group of units of measure and their corresponding base unit of measure. The standard unit classes are Length, Weight, Volume, Area, Time, and Pack.

Unit of measure conversions

Numerical factors that enable you to perform transactions in units other than the primary unit of the item being transacted.

UOM

See unit of measure (UOM).

URL

The Universal Resource Locator. The address for any file of text, graphic, sound, or video information displayed on the World Wide Web.

User currency

The currency which the user has defined as the preferred currency.

V

Void

Removing a particular transaction from the records.

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W

Warranty

A non-billable, zero-monetary service item attached directly to a product at shipment.

Web browser

Software that enables a user to view information (browse) on the World Wide Web using HTTP.

Web server

A server connected to the Internet that stores documents and files and can display them to people accessing the server.

Win probability

The likelihood that the opportunity can close as a win by the expected close date. Your implementation team determines permissible values. Win probability can be linked to status so that status automatically updates when win probability changes.

Work in Process (WIP) accounting class

A set of accounts that you use to charge the production of an assembly. You assign accounting classes to discrete jobs and repetitive schedules. Each accounting class includes distribution accounts and variance accounts. Also used in cost reporting.

Work in Process (WIP) move resource

A resource automatically charged to a discrete job or repetitive schedule by a move transaction. Resources are automatically charged when a forward move occurs, and uncharged when a backward move occurs.

Work items

Functions to be performed as part of the fulfillment of a service.

Work order date

The date to begin processing the paperwork for the discrete job. This date is offset from the start date by the preprocessing lead time.

Worker

An independent concurrent process that executes specific tasks. Programs using workers to break large tasks into smaller ones must coordinate the actions of the workers.

Workflow Engine

The Oracle Workflow component that implements a workflow process definition. The Workflow Engine manages the state of all activities, automatically executes functions, maintains a history of completed activities, and detects error conditions and starts error processes. The Workflow Engine is implemented in server PL/SQL and activated when a call to an engine API is made.

X

XML (extensible Markup Language)

XML is a method for putting structured data into a text file. It is a subset of SGML (Standard Generalized Markup Language), which is a system for tagging and organizing elements of a document (in the case of XML, that document is a text file). 'Structured data' would appear in such things as spreadsheets, configuration parameters, or financial transactions. Applications that produce such data often also store it on disk in either a binary or text format. If the data is stored in text, you can view it without having access to the application that created it. XML is a set of rules, guidelines, and conventions for designing text formats for such data in such a way that it is easy for computers to generate and read. Using XML to define data avoids such pitfalls as ambiguity, lack of extensibility, lack of support for internationalization or localization, and platform dependency.

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Z