Oracle® Advanced Outbound

Concepts and Procedures Guide,

Release 11*i*

October 2001

Part No. A95162-01

ORACLE®

Oracle Advanced Outbound Concepts and Procedures, Release 11*i*

Part No. A95162-01

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Preface

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA)
- Database Administrators (DBA), and others with similar responsibility
- Interaction Center Operations Managers and Supervisors

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Structure

The topics are organized in the following groups:

Understanding Oracle Advanced Outbound - provides overviews of the application and its components, explanations of key concepts, features, and functions, it's architecture and procedd flows, as well as the application's relationships to other Oracle or third-party applications.

Administering Oracle Advanced Outbound - provides task-based procedures for all tasks performed from the Oracle Advanced Outbound HTML Admin Console.

Other Administering Tasks - provides information and steps to perform administration tasks not present in teh Oracle Advanced Outbound HTML Admin Console.

Related Documents

For more information, see the following documentation:

Oracle Call Center Connectors Implementation Guide

Oracle Call Center Connectors Concepts and Procedures Guide

Oracle Interaction Center Implementation Guide

Oracle Interaction Center Concepts and Procedures Guide

Oracle Marketing Online Implementation Guide

Oracle Marketing Online Concepts and Procedures Guide

Oracle TeleSales Implementation Guide

Oracle TeleSales Concepts and Procedures Guide

Oracle Universal Work Queue Implementation Guide

Oracle Universal Work Queue Concepts and Procedures Guide

1

Understanding Oracle Advanced Outbound

This chapter provides an overview of Oracle Advanced Outbound, a list of terms and definitions, explanations of key concepts, system architecture information, and business process flows.

This chapter covers the following topics:

1.1 Overview

Oracle Advanced Outbound (AO) is part of the Oracle E-Business suite of applications and it consists of two main components:

A tactical list manager, which determines who to call and when to make these calls

An outbound dialing engine, which dials numbers and transfers live contacts to interaction center agents

Advanced Outbound integrates with and relies on Oracle Marketing Online to create campaign schedules and lists which Advanced Outbound will execute. Advanced Outbound serves as the execution arm for these marketing lists, to maximize both outbound list penetration and agent productivity. Advanced Outbound integrates with desktop applications like Oracle TeleSales and Oracle Collections to handle the actual customer interactions.

Advanced Outbound also integrates with Oracle Interaction History to provide feedback that marketers can use to analyze and measure the success of the marketing campaign, thereby providing a closed-loop marketing process.

Oracle Advanced Outbound can be used whenever agents need to contact parties via the telephone.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.2 Acronyms

The following list provides explanations for each of the acronyms used in this guide:

ACD - Automatic Call Distributor

AO - Oracle Advanced Outbound

AOL - Application Object Library

API - Application Programming Interface

B2B - Business-to-Business

B2B2C - Business-to-Business-to-Consumer

B2C - Business-to-Consumer

CCC - Oracle Call Center Connectors

CRM - Customer Relationship Management

CT - Computer Telephony

GUI - Graphical User Interface

IH - Oracle Interaction History

JSP - Java Server Page

JTF - (Oracle's) Java Technology Framework (also known as JTA and JTT)

OMO - Oracle Marketing Online

OTM - Oracle Telephony Manager

PBX - Private Branch Exchange (business phone system)

PL/SQL - Procedural Language / Structured Query Language

SIT - Special Information Tone

SQL - Structured Query Language

TCA - (Oracle's) Trading Community Architecture

UI - User Interface

UWQ - Universal Work Queue

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.3 Terms and Definitions

This section provides a list of the terms used in this guide and a corresponding definition for each:

Abandoned Calls - A call that was dialed predictively; however, no agent was available when the call was connected, therefore the dial server dropped the line. Also known as nuisance calls. The goal of Advanced Outbound is to reduce/eliminate these calls.

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

Calendar - Specify dates and times when the list is accessible. Advanced Outbound utilizes two types of calendars, Country and User Defined. country calendars are applied at the record level as dictated by the country code. User Defined calendars are applied at a campaign schedule or list level.

Callback - A feature of Advanced Outbound that allows a call to reoccur at a specified interval if a live contact is not achieved on the first attempt.

Call Progress Detection - The process of listening for audible tones such as dial tone, SIT tones, busy signals, and ring-back tones to determine the state of a call through the network. When dialing in predictive mode, this process is done through the ISDN Network Interface boards. In non-predictive dialing modes (preview, and progressive), the agent will have the responsibility of determining the call progress.

Calling List - A collection of records containing a unique identifier, and possibly other information about a customer/contact/prospect. Calling lists are generated by Oracle Marketing Online and executed within Oracle Advanced Outbound.

Call Outcome - A consequence from a dial attempt to contact a customer. 'Outcome' reflects network connectivity (e.g. connect, busy, ring-no-answer, SIT, etc.); a list of system defined outcome codes are defined within Advanced Outbound, others may be user defined. Call Outcome is combined with Result and Reason codes to provide a triage of information that determines what happened with the call and why.

Call Result - A consequence from a dial attempt to contact a customer. 'Result' reflects the results of a completed connection and is user/application defined. Examples of 'Results' could include: "Sale" or "No Sale" or "Wrong Party Contact".

Call Reason - A consequence from a dial attempt to contact a customer. 'Reason' codes are optional user/application defined. It is used to further detail the 'Result' of the call, such as "Too Expensive" or "Using Competitor's Product" or "No Interest"

Campaign - An organizational unit of a focused marketing effort.

Campaign Schedule - A time specification during which the campaign may execute.

Canonical Dialing Strings - A format string for representing a telephone dialing sequence.

Example: + CountryCode Space (AreaCode) Space SubscriberNumber

The components of this structure are given in the following:

+ It indicates that the number that follows it uses the canonical format.

CountryCode - A variably sized string containing one or more of the digits 0-9. The CountryCode is delimited by the following Space. It identifies the country in which the dial destination is located.

Space - Exactly one character. It is used to delimit the end of the CountryCode part of a dial string.

AreaCode - A variably sized string containing zero or more of the digits 0-9. AreaCode is the long distance dialing information portion of the address and is optional. If the area code is present, it must be preceded by one left parenthesis, and followed by right parenthesis and one Space character.

SubscriberNumber - A variably sized string containing one or more of the digits 0-9.

Computer Telephony (CT) - This term refers to technology that applies computer intelligence to making, receiving, and managing telephone calls. CT technology encompasses products such as voice and fax messaging, auto attendants, fax-on-demand, fax servers, and interactive voice response (such as automated order-entry systems). Core technologies include voice recognition, text-to-speech, and more recently, the Internet. In other words, CT systems automatically handle and process phone calls. These systems often let agents or call recipiants control various aspects of the call using either a touch-tone phone or spoken commands.

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

Front hold Message - A message played when an agent is not available to take a call.

List Priority - The list manager will select records to be pulled based on the priority of the lists, where the lower the number assigned to a list, the higher the priority of the list. List with the same priority will be round-robined.

List Subset - A logical grouping of records within a list where members of the group must meet criteria defined for the group.

Marketing Medium - A marketing medium is the marketing channel for your marketing activity. It is the specific magazine or television station where you advertise or the telemarketing center executing your campaign.

No Answer Ring Count - Specifies the number of rings before Advanced Outbound considers the call outcome to be “no answer”.

Oracle CRM Foundation - The CRM Foundation provides a variety of services that can be exploited, as appropriate, by any of the other applications of the Oracle CRM Suite. The CRM Foundation provides standard APIs for accessing and manipulating business objects such as customer, resource, and task records. In addition to these APIs, the Foundation also provides robust processing engines, such as Territory Manager and 1-to-1 Fulfillment. One of the most important components of the Oracle Foundation is the customer data model known as the Trading Community Architecture (TCA). This powerful model permits the capture of complex customer relationships and supports flexible business models across industries. Finally, the

Foundation's business APIs facilitate integration of the CRM suite with legacy or third-party applications in environments where that is essential.

Predictive dialing - Advanced placing of calls out to an automated dialer where the determination of when and how many calls are to be placed, is driven by an algorithm. The algorithm takes into consideration many factors (number of agents, agent talk time, connection rate, abandonment rate, etc.) and calculates the number of calls to place given the rate of agent availability.

Preview dialing - A dialing method where agents are presented the record to be called, and the agents determine when the dial is to be placed.

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

Progressive dialing - A dialing method where the system simultaneously initiates the dialing of the record with that of displaying the record to an agent for review.

Quantum Release Strategy - The base release strategy of the list manager, where quantum applies to all the other strategies. The quantum strategy round-robins the release of records from the list based on the quanta number assigned to the list. Each list releases a set number of records—its quantum—each time it is accessed, provided that there are that many records available in the list at that time.

Quota Release Strategy - Quota release strategy modifies the quantum release strategy to only allow the completion of a certain number of records—the list's quota—from a list during a time period specified in the parameters for the list. At the beginning of each time period the quota for the list is reset.

Recycling - The process of executing business rules as defined by Advanced Outbound to determine if and when a customer record should be called again.

Record Filter Criteria - A boolean condition logic which, in the context of this guide, specifies conditions which a record must meet before the record is available to be dialed.

Special Information Tones (SIT) - Signals from the telephone network when certain error conditions are encountered. Standard SIT tones detected by Advanced Outbound include:

Reorder

Vacant

Busy

Intercept

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

Trading Community Architecture (TCA) - The trading community architecture is an architecture concept designed to support complex trading communities. The goal of TCA is to provide the foundation for Oracle ERP, CRM, and E-Business applications (i.e. the entire E-Business Suite). To do this, TCA strives to model all relationships within a "Trading Community". This enables one data model to store B2B, B2B2C, B2C, B2C2C, and partner model data.

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

1.4 Key Concepts

This topic group provides information on the major concepts necessary to fully utilizing the potential of Oracle Advanced Outbound, including the following:

Calling Calendars

Campaign Schedules

Campaigns

Dialing Methods

Dialing Options

Do Not Call

Importing Lists

List Entries

Lists

List Source Types

Outcome, Result, and Reason Codes

Recycling

Record Filter

Release Priority

Release Strategy

Server Groups

Sort Fields

Subsets

Time Zone Management

Trading Community Architecture

VDU Configuration

Voice Messages

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.1 Calling Calendars

A calling calendar defines a set of callable times. Calendars can be associated to either regions (countries) or marketing objects (campaign schedules and lists). Advanced Outbound utilizes two types of calendars:

- Country Calendar
- User Defined Calendar

Country Calendar

A country calendar consists of a baseline callable time range for all seven days of the week, as well as any exceptions. Exceptions are most commonly used for holidays, and may be specified by specific date or by pattern (third Friday of each month).

For each unique Country Code found in a campaign schedule, there must be a defined country calendar. Country Calendars are defined on a record basis, as dictated by the country code specified in the record.

Country calendars are expected to be created based on country-specific laws and are required for Advanced Outbound. There may be cases where it is acceptable to call targets outside of the range of these laws; for example, if a callback is requested at a specific time. User defined calendars may be used to do this.

Every list entry has one to many contact points. Every contact point (telephone number) must have an associated country code and time zone. Every country code

must have an associated calendar. This association creates the base set of callable times for every list entry. Advanced Outbound ships with country calendars for many countries; however, additional country calendars can be created and added to the base product as necessary to meet your business needs.

Advanced Outbound uses a combination of the time zone and country calendar information for the current contact point of each list entry, as well as any calendar information for the list and campaign schedule of each list entry, to dynamically determine the callable time ranges for each list entry.

User Defined Calendar

User Defined calendars are optional calendars which can be associated with campaign schedules or lists. These calendars are used to override information in the country calendar; however, user defined calendars don't automatically override country calendars. To begin overriding a country calendar, you must select Yes from the drop down list in the Override Country Calendar field on the User Defined Calendar Details window for the selected user defined calendar. These calendars allow you to specify calling times outside of the calling time parameters contained in the standard country calendar you are using.

For example, the default calling time in the country calendar you are using is 8AM to 9PM; however, you are only calling businesses and you know that nobody will be present after 6PM. You can create a User Defined calendar that adjusts the call time accordingly.

Calendar Example:

Advanced Outbound ships with a default U.S. calendar. It contains the following baseline callable ranges:

Sunday 10AM-8PM

Monday 9AM-9PM

Tuesday 9AM-9PM

Wednesday 9AM-9PM

Thursday 9AM-9PM

Friday 9AM-9PM

Saturday 9AM-8PM

In addition, it contains restricted calling hours for the standard U.S holidays. Note that the callable times are always specified in terms of the local time zone; no time

zone specification is necessary. If the call center administrator wishes to prevent calling on a specific list from 6PM to 8PM on a specific date (for example, Monday, June 4, 2001), they can create an User Defined calendar with the following exception information:

06-04-2001 6PM-8PM: no calling

and apply it to the list.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.2 Campaign Schedules

Campaign schedules support multiple channels of execution within a marketing campaign. A campaign schedule is the highest-level object associated with Advanced Outbound. Lists are associated to campaign schedules, as are agents. A campaign schedule has a start date and an end date. Multiple campaign schedules can be associated to one marketing campaign, where the campaign schedule is managed as a different execution channel.

The release strategy is executed at the campaign schedule level. When the campaign schedule is created in Oracle Marketing Online, the interaction center administrator designated for campaign schedule approval (via the Marketing Medium specification) will receive notification. The admin must approve the campaign schedule before it can be executed. This approval process takes place in the Interaction Center Admin's Personal Homepage, where the workflow item must be approved.

Note: The configuration of campaign schedules takes place both within Oracle Marketing Online and within the Advanced Outbound administration application.

Advanced Outbound only deals with the lists targeted for outbound telephony execution. In order for Oracle Advanced Outbound to be able to use a campaign schedule from Oracle Marketing Online, the following conditions must be met in OMO:

- The activity must be set to "Telemarketing". This is typically defined as part of the campaign schedule setup type (in the 'Administration' tab for the Oracle Marketing Super User responsibility in HTML applications).
- The campaign schedule's status code must be set to "active". This is set in the 'Administration' tab for the Oracle Marketing Super User responsibility in HTML applications.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.3 Campaigns

A campaign is the organizational unit of a focused marketing effort and campaigns define that marketing effort. Campaigns are a fundamental entity for Oracle Marketing and are never used directly by Advanced Outbound, although they contain the campaign schedules and lists which are. One marketing campaign can have multiple campaign schedules associated with it and each of these campaign schedules can be targeted for different execution channels. For example a marketing campaign might have a campaign schedule associated with it that is targeted for email execution and another associated with it that is targeted for telephony execution.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.4 Dialing Methods

A dialing method is the mode by which the system dials the customer telephone numbers as it passes the records to the agents. Automated dialing enhances productivity and list penetration because it dials the customer telephone numbers with a reduced chance for error.

Each list can have a different dialing method. Advanced Outbound allows you to set up different lists with different dialing methods. Lists are set by default to use

the dialing method of the parent campaign schedule. However, this default can be overridden at any time.

Oracle Advanced Outbound supports the following dialing methods:

- **Preview** - In preview dialing, the list entry information is delivered to the agent-facing application. It is up to the application to initiate the dial programmatically, or for the agent to initiate the dial using the softphone.
- **Progressive** - When progressive dialing is used, Advanced Outbound delivers the list entry information to the desktop application and simultaneously places the dial from the agent's telephone. In the case of a non-connect outcome, it is up to the agent to classify the call.
- **Predictive** - When predictive dialing is selected, Advanced Outbound runs a pacing algorithm, which places dials in advance of agent requests. Advanced Outbound attempts to predict or anticipate when agents will become available and then transfer only live contacts to them. This behavior is customizable through the use of dialing options.
- **Manual** - With manual dialing, there is no CTI; therefore, the agent dials the call by hand.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.5 Dialing Options

Dialing options are used to customize the behavior of predictive dialing. They can be used to set things like:

- The number of rings before a call is considered a 'no answer'
- The abandonment rate for calls
- Answering machine detection level
- The types of calls to transfer to agents
- Whether to play a prerecorded message when an answering machine is detected or when an agent is not available

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.6 Do Not Call (DNC)

In compliance with the Telephone Consumer Protection Act (TCPA), at the request of the call recipient, calls can be blocked so that they will not be dialed by Oracle Advanced Outbound or any other application.

Oracle Marketing Online removes the records from the target group (calling list). Advanced Outbound checks TCA Contract Preferences before making records available for dialing. Therefore, any updates will be seen by Advanced Outbound.

Do not call information is used automatically by Advanced Outbound. TCA defines a flexible model for the specification of contact uses and contact restrictions. The data is actually maintained by applications like Telesales; there is no user interface within Advanced Outbound dealing with DNC information.

For more information on DNC lists, please refer to the specific Oracle business application's documentation.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.7 Importing Lists

The importing of lists from various sources is an important part of using Advanced Outbound. Interaction centers and marketing organizations frequently purchase lists of contacts. This functionality is entirely owned by Oracle Marketing.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.8 List Entries

A list entry is one row in a list. It is occasionally called a record. Currently, each list entry is associated with one party and has one to many contact points. The fields on each list entry are always the same within one list. They are determined by the list source type, which is associated with the list header.

List entries are created when Oracle Marketing generates a list. They contain all necessary denormalized data from other areas of the database with the exception of DNC information.

Oracle Advanced Outbound uses the list entry as the primary, permanent storage area for the record.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.9 Lists

A list is a data structure containing information about one or more customer records. A list does not reproduce the customer database; each record in the list points back to a real customer account in one of your customer databases. More specifically, each record in the list only reflects the subset of fields needed for a screen pop and to meet the list segmentation criteria.

The purpose of a list is to identify a particular segment of customer records. Once a segment has been identified, an administrator can control the conditions under which the records are called.

The term 'list' is also used to mean a specific group of list entries. As mentioned above, lists can be used with Advanced Outbound by associating them with the correct type of campaign schedule. Lists are owned by Oracle Marketing Online and are used for many purposes within marketing aside from outbound dialing.

Although different aspects of list headers are configurable from different GUI screens in Oracle Advanced Outbound, the list header structures are the same.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.10 List Source Types

A list source type is a concept used by Oracle Marketing to define how fields from the database (typically TCA) map to the columns of a list entry. A list entry has several hundered generic columns; the source type, for example, states that the phone number will go into column 1 and the name will go into column 2.

Oracle Advanced Outbound recycling algorithms and record filters are directly associated to source types because they define which fields are present in a list.

Oracle Marketing Online ships with two default list source types:

- B to B - Business to Business (ORGANIZATION_CONTACT_LIST)
- B to C - Business to Consumer (PERSON_LIST)

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.11 Outcome, Result, and Reason Codes

Outcome, result, and reason codes specify what happened on a dial attempt to contact a customer. These codes are seeded, but also user-modifiable.

- **Call Outcome** - A consequence from a dial attempt to contact a customer. 'Outcome' reflects network connectivity (e.g. connect, busy, ring-no-answer, SIT, etc.); a list of system defined outcome codes are defined within Advanced Outbound, others may be user defined.

Table 1–1 Outcome codes and their descriptions

OUTCOME_ID	OUTCOME_CODE	SHORT_DESCRIPTION
1	No Ans	No Answer
2	Busy	Busy
3	Wrong Num	Wrong Number
4	Not Avail	Not Available
5	Bad Pnum	Bad Phone Number

Table 1–1 Outcome codes and their descriptions

OUTCOME_ID	OUTCOME_CODE	SHORT_DESCRIPTION
6	Ans Mach	Answering Machine
7	Contact	Contact
8	Decease	Decease
9	Maint	Maintenance
10	Req Proc	Request Processed
11	Abandoned	Abandoned
12	Bypass	Bypass
13	Change Number	Change Number
14	Delete	Delete
15	Facsimile Tone	Facsimile Tone
16	Incoming	Incoming
17	Invalid for Calling	Invalid for Calling
18	Modem Answer Tone	Modem Answer Tone
19	Not Set Yet	Not Set Yet
20	Priority Callback	Priority Callback
21	Requeued	Requeued
22	Sit Network Busy	Sit Network Busy
23	Sit Operator Intercept	Sit Operator Intercept
24	Sit Reorder	Sit Reorder
25	Sit Vacant	Sit Vacant
26	Unidentified Sit Tone	Unidentified Sit Tone
27	Withdrawn During Network Time	Withdrawn During Network Time
28	Withdrawn During Ringing	Withdrawn During Ringing
29	FHM Hangup	FHM Hangup
30	FHM Customer Hangup	FHM Customer Hangup
31	Flunked Stoplist	Flunked Stoplist
32	Unknown	Unknown

Table 1–1 Outcome codes and their descriptions

OUTCOME_ID	OUTCOME_CODE	SHORT_DESCRIPTION
33	Dialer Error	Dialer Error
34	Discarded	Discarded
35	No ringback	No ringback
36	No dial tone	No dial tone
37	AO system	AO system
38	Failed release control	Failed release control

- **Call Result** - A consequence from a dial attempt to contact a customer. 'Result' reflects the results of a completed connection and is user/application defined. Examples of 'Results' could include: "Sale" or "No Sale" or "Wrong Party Contact".

Table 1–2 Result codes and their descriptions

RESULT_ID	RESULT_CODE	SHORT_DESCRIPTION
1	NoSale	No Sale
2	Sale	Sale
3	Compl	Customer Complaint
4	Cb	Call Back
5	Multi Act	Multiple Activities
6	Completed	Completed Activity
7	Incompleted	Incompleted Activity
8	Sent	Message Sent
9	Not Sent	Message Not Sent
10	Failed validation	The record failed to be validated
11	Cache expiration	The record expired in the cache

- **Call Reason** - A consequence from a dial attempt to contact a customer. 'Reason' codes are optional user/application defined. It is used to further detail the 'Result' of the call, such as "Too Expensive" or "Using Competitor's Product" or "No Interest"

Table 1–3 Reason codes and their descriptions

REASON_ID	REASON_CODE	SHORT_DESCRIPTION
1	No Money	No Money
2	Already Gave	Already Gave
3	Expense	Too Expensive
4	No Work	Out of Work
5	Gave Office	Gave at the Office
6	Other	Other Reason
7	Busy	Too Busy
8	SP Handl Req	Special Handling Required

These codes are owned and administered by Oracle Interaction History. Advanced Outbound references these codes in its recycling algorithms. The Sales Admin assigns these outcome/result/reason codes to a campaign schedule using the Sales Admin Responsibility.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.12 Recycling

Recycling is the process of determining how to process records that have been dialed. When a record is returned, a user-definable recycling algorithm is executed, which looks at the record, the call results, and previous calls to the record.

Recycling strategies are based on:

- Call outcome
- Date, day, and time of call
- Number of call attempts
- Phone type values (a value of fields in the called record)

For example, if a call ends up with a status of "Busy," you can assume that it's likely that the decision maker is at home; therefore, you will probably want to call the customer back within a few minutes. Advanced Outbound can automatically schedule a record with a busy outcome to be attempted in 10 minutes. On the next attempt, if the line is still busy, Advanced Outbound can call back the customer in another 15 minutes.

Likewise, if there is a "No Answer" in the morning, Advanced Outbound may schedule the next call to be attempted during the afternoon of the same day.

Call recycling also occurs for lists that have contact outcomes. For instance, some applications automatically schedule callbacks after a call has resulted in a literature request. The application may schedule a callback for five days in the future, giving the customer time to receive and review the mailing. After the five days have passed, Advanced Outbound automatically calls the customer back, allowing the agent to reinforce the information sent by mail and close the sale.

Oracle Advanced Outbound also allows you to recycle calls based on the type of phone called, thereby permitting you to determine when to call a particular phone type. Phone number type handling provides a more strategic avenue when trying to make contacts. For instance, you would be more likely to reach someone on a work phone between 9am and 5pm, on a home or cell phone between 7am and 9am as between 5pm and 8pm. The following is a list of phone types on which Advanced Outbound can recycle:

- Home
- Work
- Mobile

Oracle Advanced Outbound provides a GUI that allows you to create and modify recycling algorithms.

Recycling provides the following benefits:

- Recycling ensures optimal list penetration and contact rates through intelligent scheduling of callbacks.
- The recycling strategy can be modified using the user friendly GUI provided in Advanced Outbound.
- Each list can have its own recycling strategy or share a recycling strategy.

Possible Actions for Recycling

- Call back at date

- Call back in interval
- Call back next <day of week>
- Call back next <day of week> at
- Call back next month
- Call back next month at
- Call back next week
- Call back next weekday
- Call back next weekday at
- Call back next weekend day
- Call back next weekend day at
- Call back next week at
- Call back today at
- Call back tomorrow
- Call back tomorrow at
- Do not use record
- Move record to list
- Use next phone number

Possible Conditional Check Commands

Table 1–4 Conditional Recycling Check Commands

Condition	Description
List field is	Checks a field in the call record for a specific value
Call attempt is	Checks the number of call attempts made on this record
Outcome of the nth previous call is	Checks n consecutive previous call attempts for a specific outcome
Outcome code is	Checks value of the outcome code returned from the interaction
Result code is	Checks the value of the result code returned from the interaction

Table 1–4 Conditional Recycling Check Commands

Condition	Description
Reason code is	Checks the value of the reason code returned from the interaction
Call attempt on current contact point is	Checks the value of current call attempt to this contact point
Consecutive outcome to current contact point is	Checks the value of the outcome of current call attempt to this contact point

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.13 Record Filter

Record Filters area filters against which records are checked at the point of release. Record filters are created and applied to lists. They are able to check fields of list entries. Because of this, as mentioned, record filters are directly associated to list source types.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.14 Release Priority

Release priorities determine the relative priority of a list or subset in comparison to other lists and subsets. Advanced Outbound utilizes the AMS_list_priority lookup code for release priority.

Every list and subset has a release priority. Priorities allow Advanced Outbound to distinguish between “high” priority lists and “low” priority lists. The priority selections Advanced Outbound supports are:

- Highest (1)

- High (25)
- Medium (50)
- Low (75)
- Lowest (100)

Highest through Medium level priorities are preemptive; all lists with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these lists will release its quantum of records, then the next list in the same priority level will be used.

Oracle often recommends that time-based lists (for example, the Busy and Priority Callback lists) have higher priorities, and that all other lists have lower priorities. This insures that records that need to be called back at specific dates and times are called before those that have no assigned callback dates and times. When Advanced Outbound sees that no records are available in the time-based lists (because they are scheduled for future callback), then it automatically begins the round-robin process among lists with lower priorities.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.15 Release Strategy

Release strategy is a broad concept which describes how Advanced Outbound releases records from lists and subsets. Oracle Advanced Outbound supports the following types of release strategies:

- Quantum
- Quota

An additional factor affecting release strategy is priority. Both lists and subsets have priorities which influence release strategy.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.15.1 Quantum Release Strategy

The quantum release strategy supports proportional calling across all lists and subsets associated with the campaign strategy and it is considered the baseline strategy for an Advanced Outbound service.

The list quantum controls the number of records that can be sequentially dispersed from a list or subset. This means that when Advanced Outbound is distributing customer records to agents, it releases a quantum number of records from each list or subset before it goes on to the next list or subset in the campaign.

Every list and subset has a quantum which you can dynamically adjust via Advanced Outbound. Usually, a list or subset's quantum is adjusted to reflect the proportion of customer records in that list or subset compared to other lists or subsets in the campaign.

Without the concept of a quantum, Advanced Outbound would read all records from one list or subset before moving on to another list or subset. This would exhaust each list or subset in order. While a strategy of this sort may be useful in some instances (for instances, in a Collections application, where you want all of the 60-day overdue customers called before the 30-day customers), you generally want a mix of records from different lists or subsets.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.15.2 Quota Release Strategy

The Quota Release Strategy stops releasing records from a list or subset when a pre-defined limit has been reached.

This strategy disburses records from a list or subset based on the quota that is assigned to a list or subset. A quota represents the maximum number of records with a certain outcome or result that should be obtained from that list or subset during a pre-defined period of time (set by a Quota Reset Period value).

Quotas are reset at the end of a quota reset period (defined at the list or subset level), so that the list or subset is again available for calling. The raw values used to

calculate the quota are dependent upon the outcome codes of each record and must be passed by the agent business applications to Advanced Outbound.

Due to its pre-defined limit, the Quota Release Strategy is useful for survey or appointment setting campaigns.

Quota is a Release Strategy that may be applied to both lists and subsets.

The Quota calculation is based on call outcome first, and then, optionally, on call results. Outcome and results are defined within Interaction History tables -- associated with each outcome, result (and reason) codes is a 'positive flag' -- which is use to categorize if the code is considered a positive; by default, the seeded data (outcome/result/reason) do not have this flag set.

Therefore AO will tally quota based on the following:

- If no modifications were done (e.g. setting the positive flags), then quota is tallied for all calls where outcome = connect (this is how AO 11.5.5 and earlier functons)
- If outcome = connect AND connect positive = Y, then count towards quota
- If outcome = connect AND connect positive = N, then must check result code positive flag where
  - if result code positive flag = Y, then count towards quota
  - if result code positive flag = N, then DO NOT count towards quota

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.16 Server Groups

A server group is also known as an interaction center. Interaction center servers (e.g. UWQ, OTM) typically belong to a server group. An exception to this is the Advanced Outbound Central Server, which exists one per CRM instance. A server group typically represents the concept of a call center, but this is not required.

Agents are assigned to server groups using the CRM resource manager. Servers are assigned to server groups using the call center administration interface.

A more in depth discussion of the servers that comprise Oracle Advanced Outbound is present in the Architecture section of this guide.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.17 Sort Fields

Lists can have user-defined sort fields applied. Sort fields influence the order in which records are released. (Records with user-specified callback times take precedence over records according to sort fields.) Sort fields can be any of the fields defined in the list source type. They can be combined, as well as specified in either ascending or descending order.

List sort fields are dynamic (i.e. they can be changed at runtime) and are implemented using SQL.

1.4.18 Subsets

A subset is a set of entries within a list identified by field values. Subsets are not required for Advanced Outbound. They are dynamic, and can be created and deleted at will within the context of a list.

When subsets are used, a default subset is created that contains any list entries not contained in the user-defined subsets. List entries existing in subsets that overlap are available to all subsets until they are released.

Example:

A call center administrator has a list containing a generated score in the field called 'SCORE.' This contains values from 1 to 5. Additionally, a field called 'STATE' contains the party's home state. Because of the call center administrator's interpretation of the score value, the administrator would like to create the following subsets:

Subset 1: SCORE = 5

Subset 2: SCORE = 3 or SCORE = 4

The marketing campaign is expected to get much better results in New York, so an additional subset is created:

Subset 3: STATE = 'NY'

The default subset at this point contains list entries that match:

- scores that do not equal 5
- scores that do not equal 3 or 4
- all states except New York

Each of these subsets can be given its own priority, quantum, or quota value. If the call center administrator decides that there may be a possible difference in results between the score value of three and four, they can create a new subset:

Subset 4: SCORE = 4

and edit the existing subset 2:

Subset 2: SCORE = 3

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.19 Time Zone Management

Advanced Outbound manages time zones transparently to the call center administrator. As mentioned earlier, this is dependent on every contact point (telephone number) having an associated country code and time zone value. All of these items are owned by TCA.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.20 Trading Community Architecture

The Trading Community Architecture (TCA) is a customer model designed to support complex trading communities. TCA strives to model *all* relationships within a trading community. For example, the trading community of an appliance

manufacturer may include suppliers, distributors, resellers, retailers, service providers, business consumers, and end users. The appliance manufacturer not only wishes to track relationships between itself and other entities within this trading community, it also takes an interest in relationships that other community members have with each other. The manufacturer may not even have direct relationships with all such members; nevertheless, it needs to know about them and how each relates to other entities within the community.

The TCA architecture is unique to the Oracle E-Business Suite and differentiates it from other products through the following capabilities:

Single Source of Truth

Because the entire Oracle E-Business Suite uses the TCA customer model, Oracle offers users a single source of truth for customer data. A customer record is exactly the same whether it is viewed through Oracle Sales Online, Oracle Marketing Online, Oracle Customer Care, Oracle Financials, or Oracle iStore.

The "Party" Concept

The concept of party enables the customer model to treat all business entities equally. This means that each customer, regardless of type (organization, person, group, or relationship), is handled in the same way by the model.

Because all business entities are treated alike, the customer model can easily handle B2B, B2C, or mixed business models. Although the model tracks attributes for people different from those it tracks for organizations (e.g., date of birth, title, and gender for people; DUNS number, SIC code, and fiscal year end for organizations), both people and organizations are parties, and their records are therefore stored in the same physical table in the database. This in turn means that the same business relationships that can be formed with an organization can be formed with a person.

Any number of parties can be grouped into a single entity. This allows the modeling of complex business entities such as households and buying consortiums. A group can be viewed as a single entity; meanwhile, each of its members can still be viewed as a distinct entity.

The relationship between two parties may be viewed as a party in its own right. For example, if John works at Oracle, three parties could exist: John (party of type **person**), Oracle (party of type **organization**), and John@Oracle (party of type **relationship**). Because John@Oracle is a party in its own right, addresses, phone numbers, and customer accounts can be directly associated with the John@Oracle entity.

The customer models of other products typically treat organizations and people as entities of two distinct types, which makes dealing with mixed business models difficult. Many CRM products on the market today were originally designed to support only a B2B business model In a pure B2B environment, customers are always organizations and people are simply contacts for those organizations. For such models, it makes sense to distinguish organizations from people and to provide functionalities specific to each. For example, in a pure B2B environment, the data model would probably support associating leads, opportunities, and accounts with organizations but not with people (because people would be simply contacts for organizations, not customers).

As CRM vendors came to realize that their models needed to support B2C and mixed models as well, they began trying to reshape their existing B2B-only models. In many cases, the result is a data model designed for B2B with a few patches to support basic B2C functionality.

The "party" data is maintained by the Oracle business applications (TeleSales, Customer Care, etc.), and it is populated into a list by Oracle Marketing Online on a one "party" per list entry basis. Based on the source type, different data will be pulled into the list entry.

Many-to-Many Relationships

The customer model supports many-to-many relationships between parties and locations (i.e., addresses). Because an address can be associated with multiple parties, the address need not be duplicated; if it changes, it only has to be updated once.

Advanced Relationship Modeling

The customer model stores party relationships as distinct entities, allowing any party to be a member of any number of relationships. Additionally, because each relationship has a specific type (e.g., parent of, employee of, subsidiary of, reseller for), two parties can have multiple relationships with each other (e.g., John is the spouse of Mary, but John is also the business partner of Mary). Many other customer models hard-code relationships into person or organization entities; for example, the record for a person might have a Manager column to identify the person's manager. This method of defining relationships is very rigid: it limits both the number of relationships that can be recorded for an entity and the number of types of such relationships. By contrast, the TCA customer model, though it comes with several seeded relationship types, allows customers to define any number of additional types.

The Oracle customer model also supports matrix hierarchies (relationship networks). This means that any party record may have one or more parent records. Additionally, the customer model supports non-hierarchical relationships such as spouse of and partner of. Other customer models tend to offer only simple hierarchies in which each record may have only one parent and non-hierarchical relationships are not supported.

The Oracle customer model supports current and historical relationships. Because party relationships are stored in their own table, they can have their own attributes. The two key attributes for historical relationship information are *start date* and *end date*. When a party relationship ends, the application prompts the user to provide an end date for the relationship instead of deleting the relationship record.

Thus valuable relationship history may be maintained indefinitely. In many other customer models, contrariwise, relationships are hard-coded: this requires a new relationship to replace a prior one, with the loss of the associated historical information.

Separation of Party and Customer Account

The Oracle customer model separates the business entity (party) from the business relationship (e.g., customer of). This allows each party to have multiple customer accounts (i.e., to have multiple business relationships with any other party). Additional parties (e.g., an authorized buyer or guarantor) can also be associated with any customer account.

Flexible Party Classifications

The customer model allows for any number of user-defined party classifications, which can be used for reporting and assignment purposes. A user may wish to stratify customers by industry, size, and buying behavior. The user decides not only these categories but also the classes (or values) within each category. Classes can then be broken down into subclasses, which allows for rollup and reporting at different class levels. Such structures can also facilitate assignments.

Contact Point

The contact point includes the telephone number and the phone type. This data is maintained by the Oracle business application (TeleSales, Customer Care, etc.). It is populated into the list by Oracle Marketing Online and dialed by Oracle Advanced Outbound.

Contact Restriction

Contact restriction determines how the Do Not Call (DNC) list is implemented. This data is based on a *per party* basis nd it is checked by Oracle Advanced Outbound at the time of record release.

Contact Preference

Contact preference is based on a per contact point basis. This data is maintained by the Oracle business application (TeleSales, Customer Care, etc.) and is checked by Oracle Advanced Outbound at the time or record release.

Time Zones

Time zones are seeded in TCA and are not maintained by any application.

Phone Formats

The phone format defines the phone number format and area code length. This data is maintained by using the Trading Community Manager responsibility.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.21 VDU Configuration

Advanced Outbound utilizes Dialogic VDU hardware to do predictive dialing. These are physical hardware cards which must be placed into a server running Windows NT or 2000. They allow Advanced Outbound to do voice detection and classification of non-contact calls.

VDU cards must be configured into the database using the Advanced Outbound administrative interface before they can be used.

The following Dialogic VDUs are supported by Oracle Advanced Outbound:

- Basic Operation (no message support)
  - DTI/481SC, which is an ISA card and supplies 2 T1s (48 ports)
  - DTI/241SC, which is an ISA card and supplies 1 T1 (24 ports)
  - DTI/601SC, which is an ISA card and supplies 2 E1s (60 ports)

  - DTI /301SC, which is an ISA card and supplies 1 E1 (30 ports)
  - LSI/161SC, which is an ISA card and supplies 16 analog ports
- Enhanced Operation (messaging support)
  - D/480SC - 2T1, which is an ISA card and supplies 2 T1s (48 ports)
  - D480JCT - 2T1, which is a PCI card and supplies 2 T1s (48 ports)
  - D/240SC - T1, which is an ISA card and supplies 1 T1 (24 ports)
  - D240PCI - T1, which is a PCI card and supplies 1 T1 (24 ports)
  - D/600SC - 2E1, which is an ISA card and supplies 2 E1s (60 ports)
  - D600JCT - 2E1, which is a PCI card and supplies 2 E1s (60 ports)
  - D/300SC - E1, which is an ISA card and supplies 1 E1 (30 ports)
  - D/300PCI - E1, which is a PCI card and supplies 1 E1 (30 ports)
  - D/160SC - LS, which is an ISA card and supplies 16 analog ports
  - D120JCT - LS, which is a PCI card and supplies 16 analog ports

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.4.22 Voice Messages

Advanced Outbound is able to play messages both for front hold (i.e. when an agent is not available) and when answering machines are detected. Messages must be recorded into a .wav or .vox file using an external utility (these programs come with all modern operating systems). They are then imported into the database using the Advanced Outbound administrative interface. Messages are associated to campaign schedules, and different messages can be specified for home and work telephone numbers.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5 Advanced Outbound System Architecture

This topic group provides information on the servers that comprise Advanced Outbound, its other components, how they are configured to work together, and how they integrate with Oracle Marketing Online.

This topic group covers the following topics:

Advanced Outbound Physical Architecture

Advanced Outbound Servers

Call Center Connectors

Oracle Marketing Online Integration

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.1 Advanced Outbound Physical Architecture

The Advanced Outbound product consists of three main components:

1. **Schema -** Advanced Outbound has schema objects (primarily tables and views), PL/SQL packages, as well as Java stored procedures. The Advanced Outbound schema stores:
   - Cached records
   - Returned records
   - Call history
   - Recycling algorithms
   - Record filters
   - Runtime information on cache load
   - Subset information
   - VDU configuration data

- Voice messages

2. **Administration GUIs -** Advanced Outbound has a set of administration user interfaces to perform the following tasks:
   - Campaign schedule call center parameter setup
   - List call center parameter setup
   - Subset creation and maintenance
   - Record Filter creation and maintenance
   - Recycling creation and maintenance
   - VDU configuration
   - Voice messaging import and maintenance
   - Real time reporting
3. **Java servers -** Advanced Outbound has two Java server processes:
   - Advanced Outbound Central Server
   - Advanced Outbound Dial Server

   These servers are discussed in greater detail in the Advanced Outbound Servers topic.

See Also:

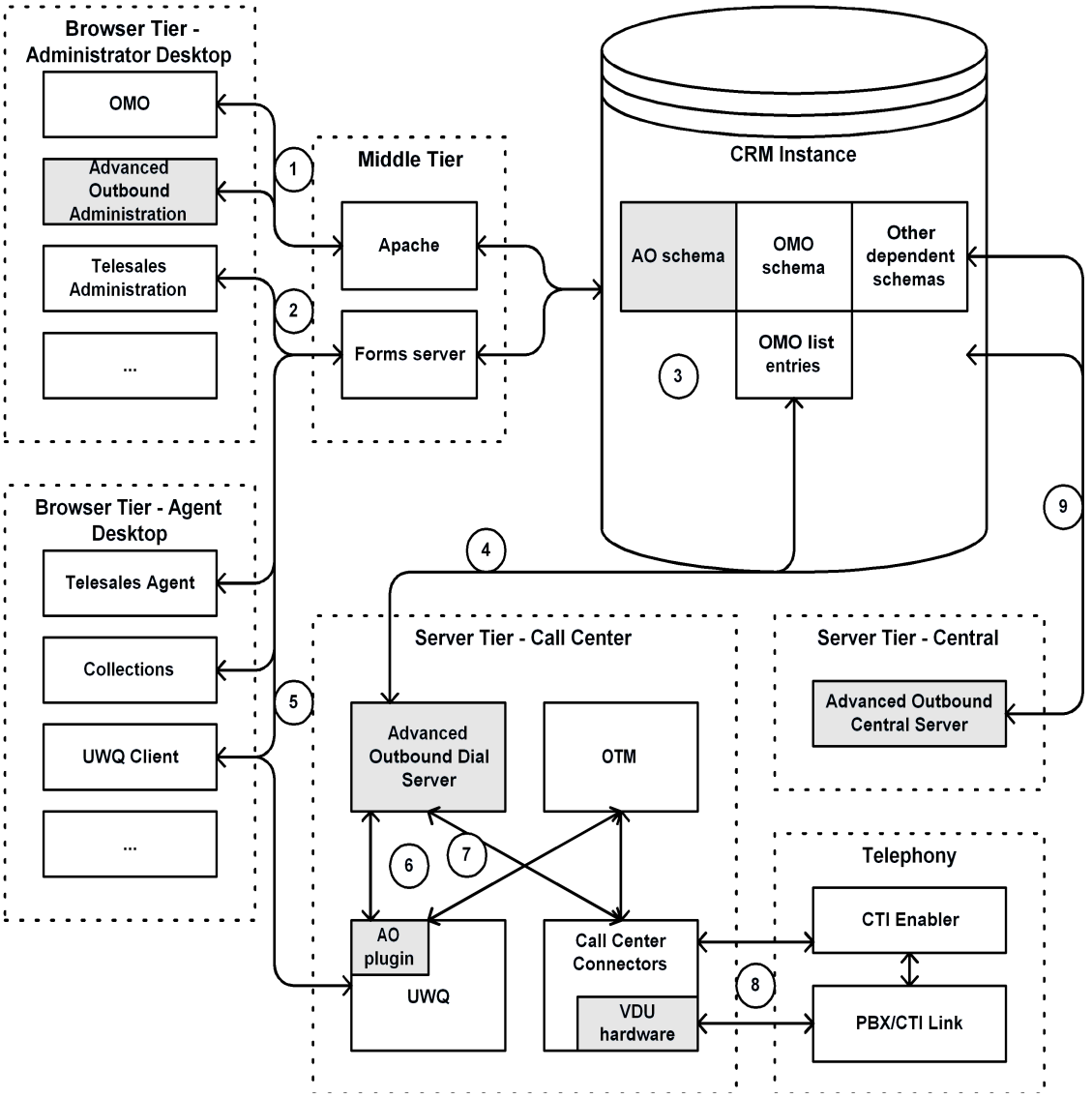
Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.1.1 Oracle Advanced Outbound Architecture Diagram

The following diagram shows the Advanced Outbound components in the context of a complete system. Components which are actually part of the Advanced Outbound product are highlighted in gray.



Numbered areas on the physical architecture diagram are explained below.

1. The Advanced Outbound administration GUI is on the HTML stack. It uses the 'Advanced Outbound Administrator' responsibility and it is part of the Oracle Advanced Outbound product.
2. To implement and administer other dependent components, other screens in both the HTML and Forms interfaces will be required. Examples of responsibilities used in Forms are 'Telesales Administrator' and 'CRM Administrator.'
3. Much of the Advanced Outbound functionality and integration happens through database schemas. There is an Oracle Advanced Outbound schema present in the CRM Instance and it is part of the Oracle Advanced Outbound product. Advanced Outbound is directly dependent on the schemas of the following:
   - OMO (AMS) - Oracle Marketing Online
   - TCA (HZ) - Trading Community Architecture
   - JTF - Oracle Foundation
   - IEO - Server schema and Logger
   - CCT - Call Center Connectors
4. The Advanced Outbound Dial Server removes records from Oracle Marketing lists indirectly through the central cache and returns these records through the return queue. This process is described in more detail in the Advanced Outbound Dial Server topic.
5. The agent desktop applications, such as UWQ, Telesales, and Collections, are primarily Forms applications. All desktop applications integrate to Advanced Outbound through UWQ.
6. Advanced Outbound integrates into UWQ through the Media Provider interface. An AO plugin exists in UWQ and is considered part of the Oracle Advanced Outbound product.
7. The Advanced Outbound Dial Server uses Call Center Connectors for both CTI and VDU control.
8. Call Center Connectors were modified for the 11.5.6 release to support VDU operations. The VDU hardware on it is considered part of the Oracle Advanced Outbound product.
9. The Advanced Outbound Central Server is a lightweight server which does cache management, time zone and calendar management, and recycling. Notice from the diagram that the two Advanced Outbound servers do not

communicate directly. The Advanced Outbound Central Server is part of the Oracle Advanced Outbound product.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.2 Advanced Outbound Servers

This topic group discusses the responsibilities and architecture of the Advanced Outbound servers in greater detail, including:

The Advanced Outbound Central Server

The Advanced Outbound Dial Server

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.2.1 The Advanced Outbound Central Server

The Advanced Outbound Central Server is responsible for invoking the operations of Advanced Outbound that take place in the database. The Central Server does the following things:

- Populates Advanced Outbound's central cache from available lists
- Changes the status of campaign schedules and lists when necessary
- Periodically calculates callable time matrices based on time zone, country code, list and campaign schedule information
- Validates list entries
- Executes recycling, which also populates call history and Interaction History when necessary
- Cleans up the cache to find lost list entries (those taken by applications but never returned)

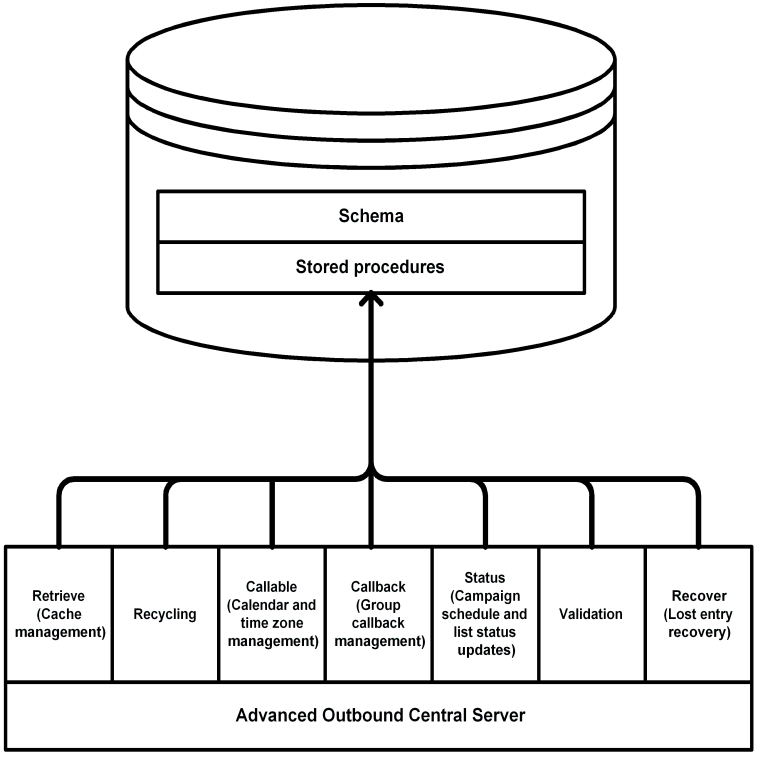
- Rolls up reporting data

The Central Server has the following design characteristics:

- Because its functionality is implemented in the database, it is very lightweight. It is essentially responsible for invoking stored procedures at timed intervals.
- Its tasks are broken up into plugins. A basic understanding of this is helpful for understanding the Central Server's configuration.

The Central Server uses the standard IEO server locator interface for configuration. A Central Server, as its name implies, exists once per instance. One Central Server performs all of the above tasks for all active campaign schedules and lists.

The following diagram depicts the Advanced Outbound Central Server, its responsibilities and it's relation to the database:



The above diagram depicts the CRM instance and the Oracle Advanced Outbound Central Server. The AO Central Server is responsible for invoking the following procedures or "tasks":

- Cache management
- Recycling
- Calendar and time zone management
- Group callback management
- Campaign schedule and list status updates
- Validation
- Reporting
- Lost entry recovery

These procedures or "tasks" are plugins and exist as stored procedures in the schema on the CRM instance.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.2.2 The Advanced Outbound Dial Server

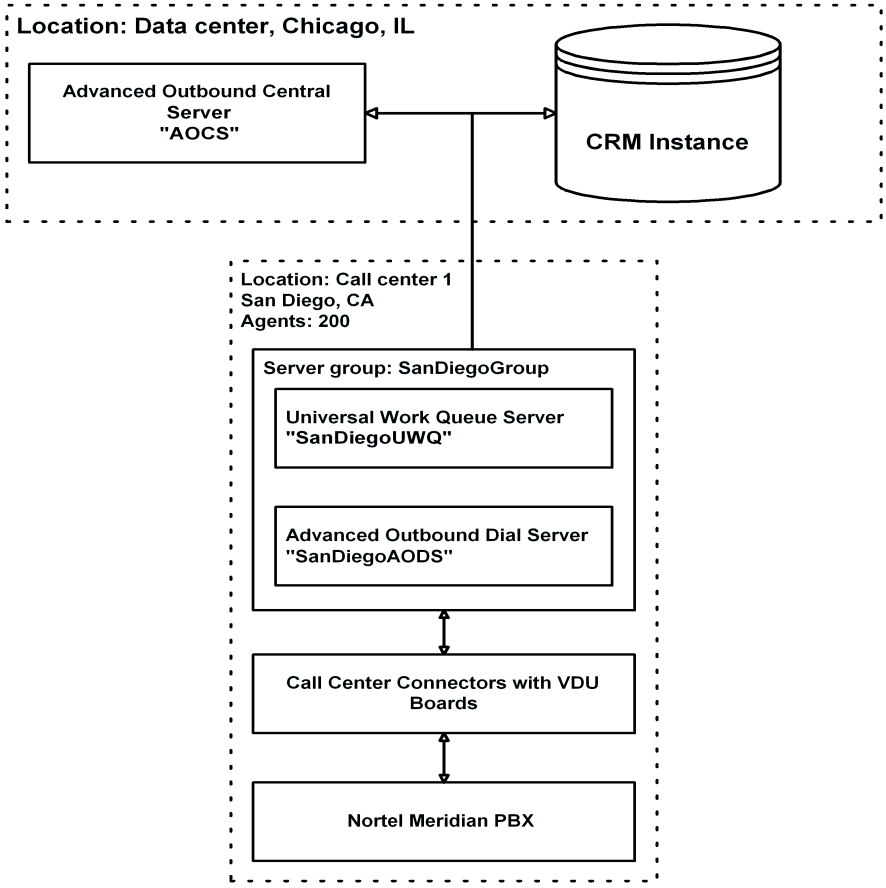
The Advanced Outbound Dial Server is responsible for the following functional areas:

- Managing agent logins and agent state (via UWQ)
- Retrieving records from the central cache
- Delivering records through UWQ to desktop applications
- Placing progressive and predictive dials
- Predictive pacing
- Receiving record status data via UWQ from desktop applications
- Returning records to the database for processing by the recycling plugin

Dial Servers belong to server groups in a similar manner to the other Interaction Center servers. For scalability purposes, multiple Dial Servers can be added to a

single server group. Note that the upper agent limit has not yet been determined for the Dial Server. When multiple Dial Servers are used, the Advanced Outbound UWQ Media Provider Plugin will automatically choose between them based on availability and load; no extra agent configuration is necessary.

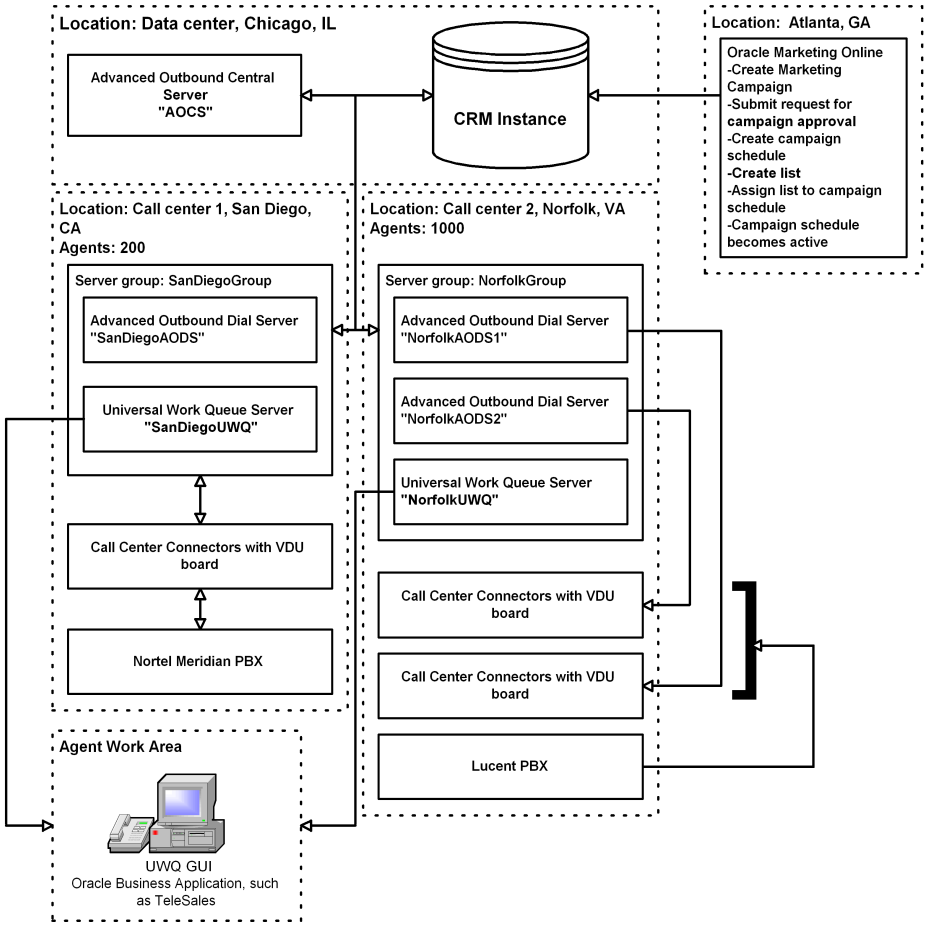
The following diagram provides a simple example layout of the Advanced Outbound servers, and illustrates the concept behind using server groups to set up distributed call centers:



The above diagram shows two interaction centers: one data center and one call center. The data center, which is located in Chicago, houses the CRM database instance and the Advanced Outbound Central Server. The call center, which is located in San Diego and has 200 agents, houses 1 instance of the Advanced

Outbound Dial Server (SanDiegoAODS). In this example, the call center in San Diego uses a Nortel Meridian PBX.

The following diagram provides a complex example layout of the Advanced Outbound servers, and illustrates the concept behind using server groups to set up distributed call centers:



The above diagram shows three interaction centers: one data center, two call centers, an agent work area, and a marketing center. The data center, which is located in Chicago, houses the CRM database instance and the Advanced Outbound Central Server. Call Center 1, which is located in San Diego and has 200

agents, houses 1 instance of the Advanced Outbound Dial Server (SanDiegoAODS). Call center 2, which is located in Norfolk and has 1000 agents, utilizes 2 instances of the Advanced Outbound Dial Server (NorfolkAODS1 and NorfolkAODS2). In this example, call center 1 in San Diego uses a Nortel Meridian PBX and call center 2 in Norfolk uses a Lucent PBX. The agent work area utilizes the Oracle Universal Work Queue GUI and a business application, such as Oracle TeleSales.

The middleware setup, which defines the CCC server and the CTI server, determines which Call Center Connectors server will be pointed to. When defining the Middleware via the Call Center HTML Admin, the flag 'Use Advanced Outbound' will indicate that there are VDU cards housed in the CCC for AO. All the VDUs housed in the SAME CCC server node MUST point to the same Dial Server. The association to the Dial Server occurs at the VDU board definition level.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.3 Call Center Connectors

The Call Center Connectors (CCC) component of Oracle Telephony Manager (OTM) is crucially important to Advanced Outbound. Part of CCC was modified to allow it to support hosting the Dialogic VDU hardware. CCC is owned by Oracle Telephony Manager (OTM); however, there are several additional AO-specific configuration steps to be done, which are explained in the *Oracle Advanced Outbound Implementation Guide*.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.4 Oracle Marketing Online Integration

Advanced Outbound is tightly integrated with and dependent on Oracle Marketing Online (OMO). As such, OMO is a prerequisite for Advanced Outbound. Integration with Oracle Marketing Online deals primarily with sharing schema objects such as:

- lists
- campaign schedules
- list entries

See Also:

Understanding Oracle Advanced Outbound

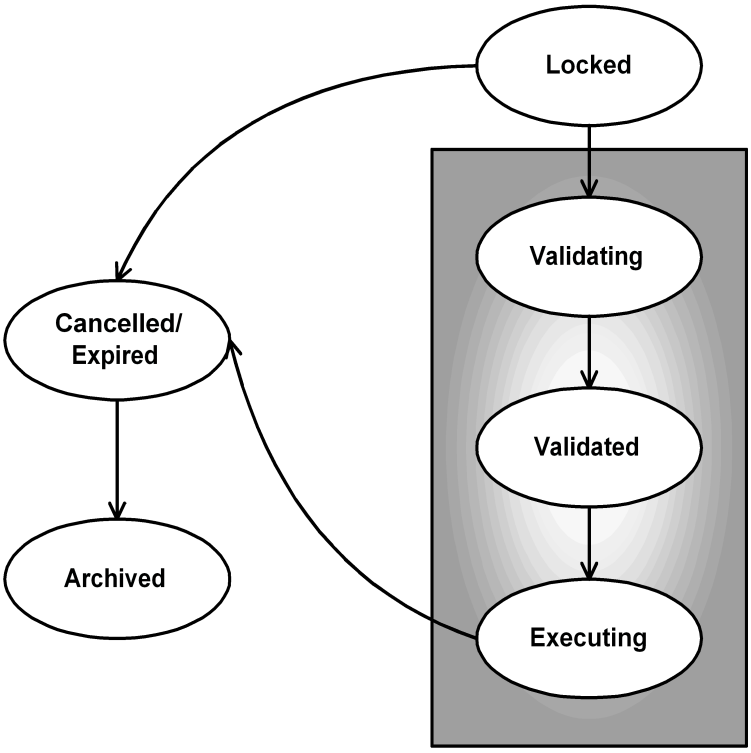
Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.4.1 List Integration

List integration with Marketing is based around a shared state model. In some states (or statuses), Marketing owns a list and its state transitions. In some states, Advanced Outbound owns the list and its state transitions.

The following diagram shows the state transition model for lists (the list states and transitions shown in shaded area are owned by Advanced Outbound):



The above diagram depicts the various list state transitions. Only the validating, validated, and executing list states are owned by Advanced Outbound.

The list state begins as "locked", where it can be cancelled/expired or begin the validating process. If it is cancelled/expired, it will be archived. If it begins the validating process, it will be validated, and begin the executing process (all within Advanced Outbound). Once the execution process has completed, it will be cancelled/expired, then be archived.

Definitions of these states, as well as the key transition states, are as follows:

- Locked (OMO). The list is manually placed into this state using the Oracle Marketing Online interface when no more changes will be made to it. Up to this point, it can be regenerated at will.
- Validating (OAO). Lists are periodically checked by Advanced Outbound, and placed into this state when:

- They are associated with a campaign schedule of the proper state
- They are locked

At this point, they are validated, which is a relatively long-running process which checks each entry's phone numbers, country codes, and time zone information.

- Validated (OAO). When a list finishes the validation process, its state is changed to validated.
- Executing (OAO). Advanced Outbound moves lists to the executing state when:
  - The current date is between the start date of the list's campaign schedule and its end date
  - The list's state is validated
  - The list's call center ready flag is set to Y
- Expired (OMO). Lists are moved to expired when the campaign schedule end date passes.

Records will only be released from lists which are in the **executing** state, and also have **active** schedules.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.5.4.2 Campaign Schedules

Similar to lists, the sharing of campaign schedules is based around a state model. However, the campaign schedule integration is simpler.

The following conditions must be true for Advanced Outbound to use a campaign schedule from Oracle Marketing (and display it in the IEC Admin GUI):

- The activity is set to 'Telemarketing.'

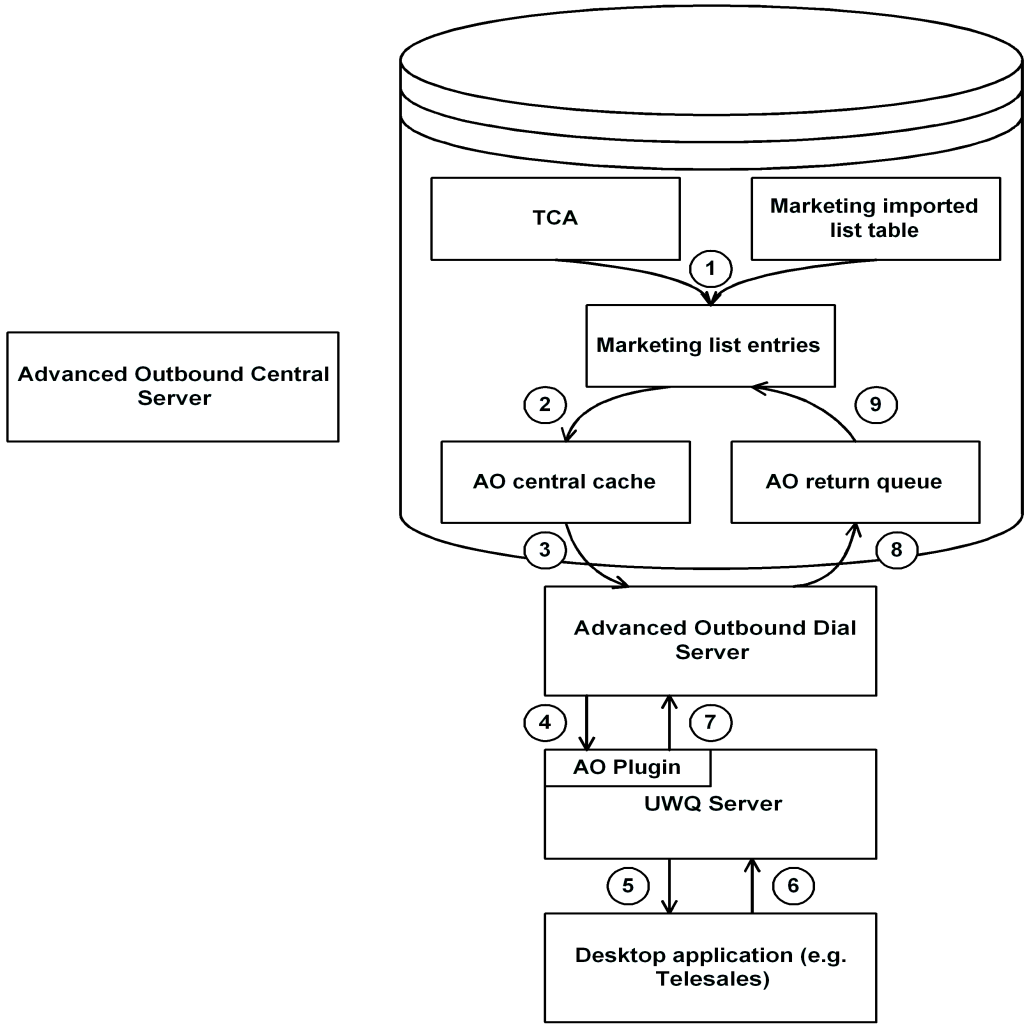
The following additional conditions must be true for Advanced Outbound to release records from lists within a campaign schedule:

- The campaign schedule's status code is active.

1.5.4.3 List Entries

The list source type determines what fields are present on each list entry. In Oracle Marketing Online, list source types have been consolidated down to B2C, or 'Consumers,' and B2B, or 'Organization contacts.'

Regardless of the data present, the following diagram shows one release and return cycle for a record:



The numbered steps in the diagram are explained below:

1. Each list entry is created during Oracle Marketing Online list generation. They will be created based on data that exists either in TCA or tables that Marketing Online uses to store imported records.
2. The Central Server populates the cache. The cache population process intentionally checks out more records than it will need to make sure that there is not a cache miss, which is very expensive. Any extra records are periodically recycled with the 'AO System' outcome code. The records selected:
   - Will be restricted according to callable time ranges for their time zone, country code, list, and campaign schedule
   - Will be restricted and ordered by callback times, if applicable
   - Will be ordered by list sort fields, if applicable
   - Are done so according to list and subset conditions, which are evaluated here
3. When the Dial Server pulls records from the central cache, it does the following:
   - Executes release strategy, taking into account things like quantum and priority. Release strategy is executed across lists in the context of a campaign schedule, as well as across subsets in the context of a list.
   - Checks do not call data.
   - Executes the list's record filter, if present.
4. As agents request calls via Oracle Universal Work Queue (UWQ), the record data is delivered from the Dial Server to the Oracle Advanced Outbound (AO) plugin component. The AO plugin formats the record data in accordance with UWQ's generic media interface and sends an event to UWQ. If predictive or progressive dialing is being used, AO will subsequently send an event to UWQ reporting on the status of either the dial (progressive) or the transfer (predictive).
5. UWQ sends an event to the application with the record data. The application retrieves the necessary additional data and begins the call.
6. When the call is complete, the application returns the record and status data to UWQ.
7. UWQ sends the record, through the AO plugin, back to the Dial Server.
8. The Dial Server returns each record, along with outcome, result, and reason code information, into the return queue.

9. Records are checked back into the Marketing list.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.6 Advanced Outbound Business Processes

This topic group provides diagrams of the various business flows that constitute Advanced Outbound.

This topic group covers the following topics:

Life Cycle of an Outbound Calling Campaign

Call Center Campaign and Calling List Setup

List Execution Process

Release Records Process

Recycling Process

See Also:

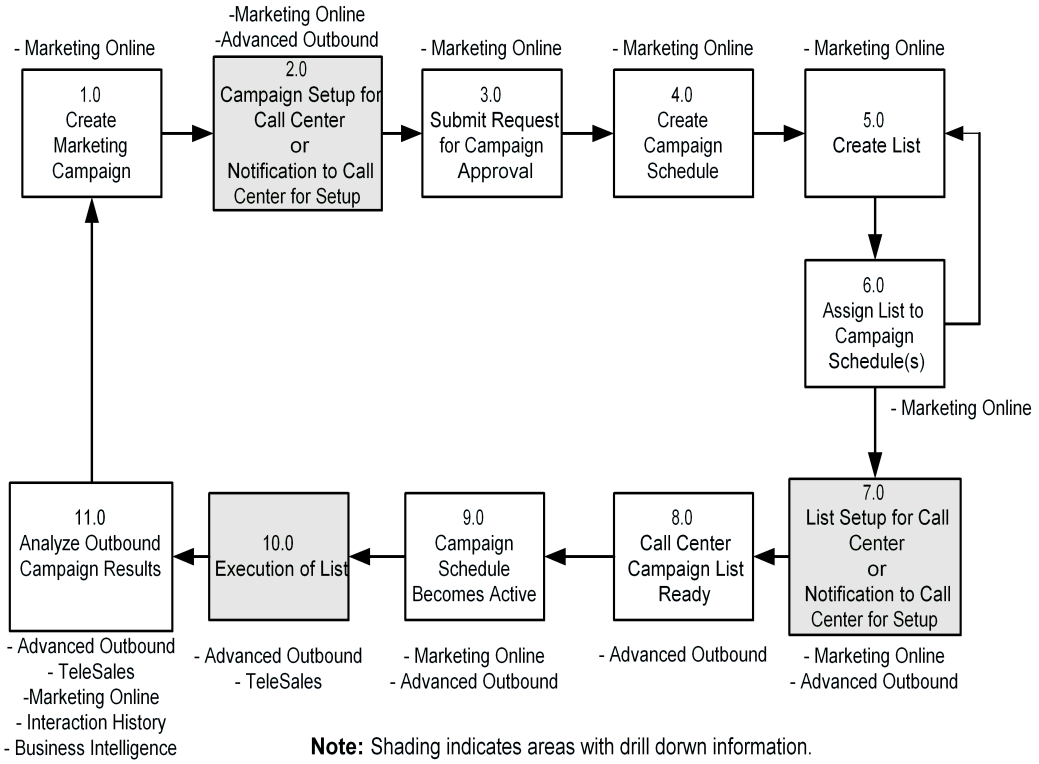
Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.6.1 Life Cycle of an Outbound Calling Campaign

The following diagram shows an outbound calling campaign life cycle - from campaign creation and execution, through post execution analysis.



Note: Shading indicates areas with drill dorwn information.

1.0 - Create Campaign

2.0 - Set up Campaign for Call Center (this area contains drill down information. See the Call Center Campaign and Calling List Setup topic.)

3.0 - Request Approval for Campaign

4.0 - Create Campaign Schedule(s)

5.0 - Create Calling List(s)

6.0 - Assign List(s) to Campaign Schedule(s)

7.0 - Complete Campaign and List Setup for Call Center (this area contains drill down information. See the Call Center Campaign and Calling List Setup topic.)

8.0 - Set Campaign Ready for Call Center Execution

9.0 - Campaign is Active (schedule date approached)

10.0 - Campaign Execution (this area contains drill down information. See the List Execution Process topic.)

11.0 - Analysis of Campaign Results

See Also:

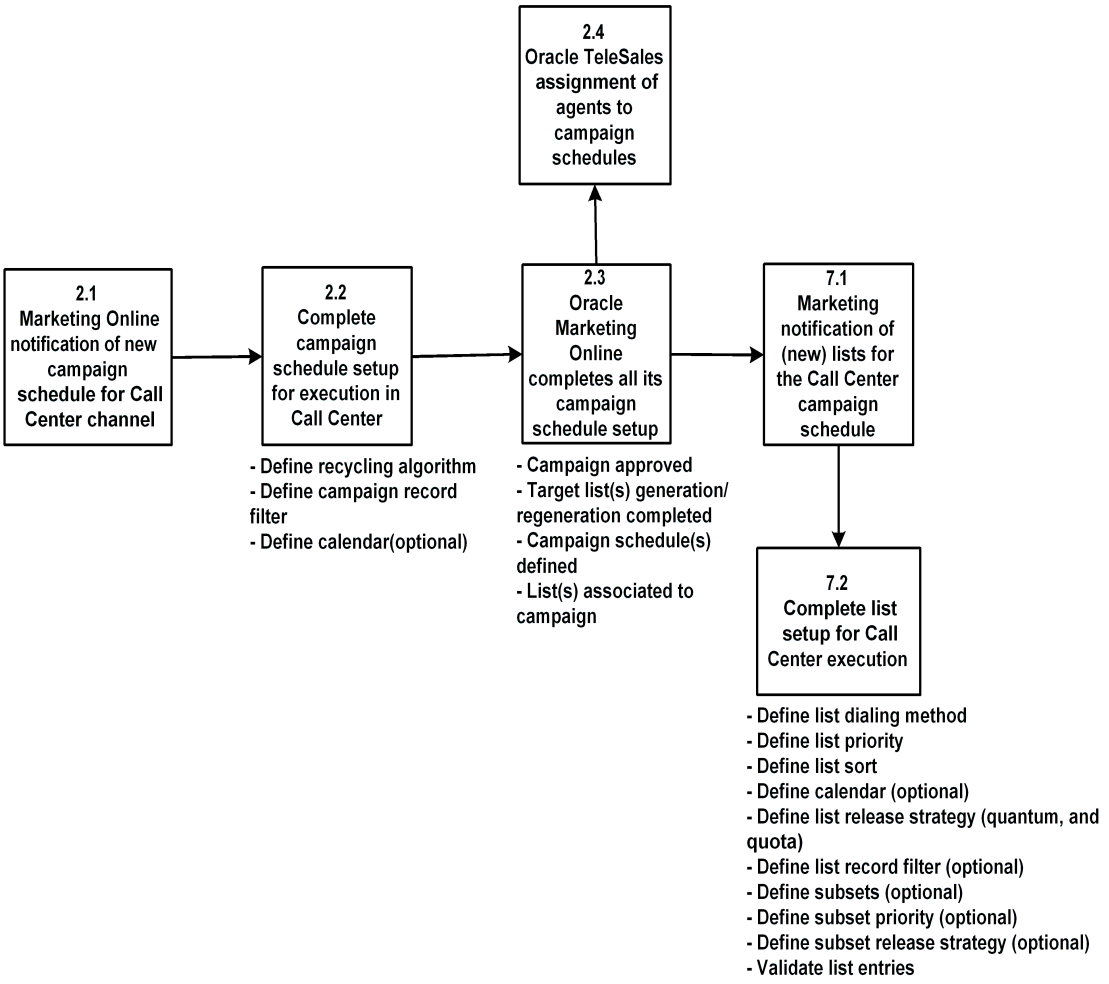
Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.6.2 Call Center Campaign and Calling List Setup

The following diagram shows the campaign and calling list setup within call center.



2.1 - Marketing Online notification of new campaign for call center

2.2 - Complete campaign setup for call center execution

2.3 - Marketing Online completes campaign approval process and list (re)generation

2.4 - TeleSales assignment of agents to campaign

7.1 - Marketing Online notification of list(s) for call center campaign

7.2 - Complete list(s) setup for call center execution

See Also:

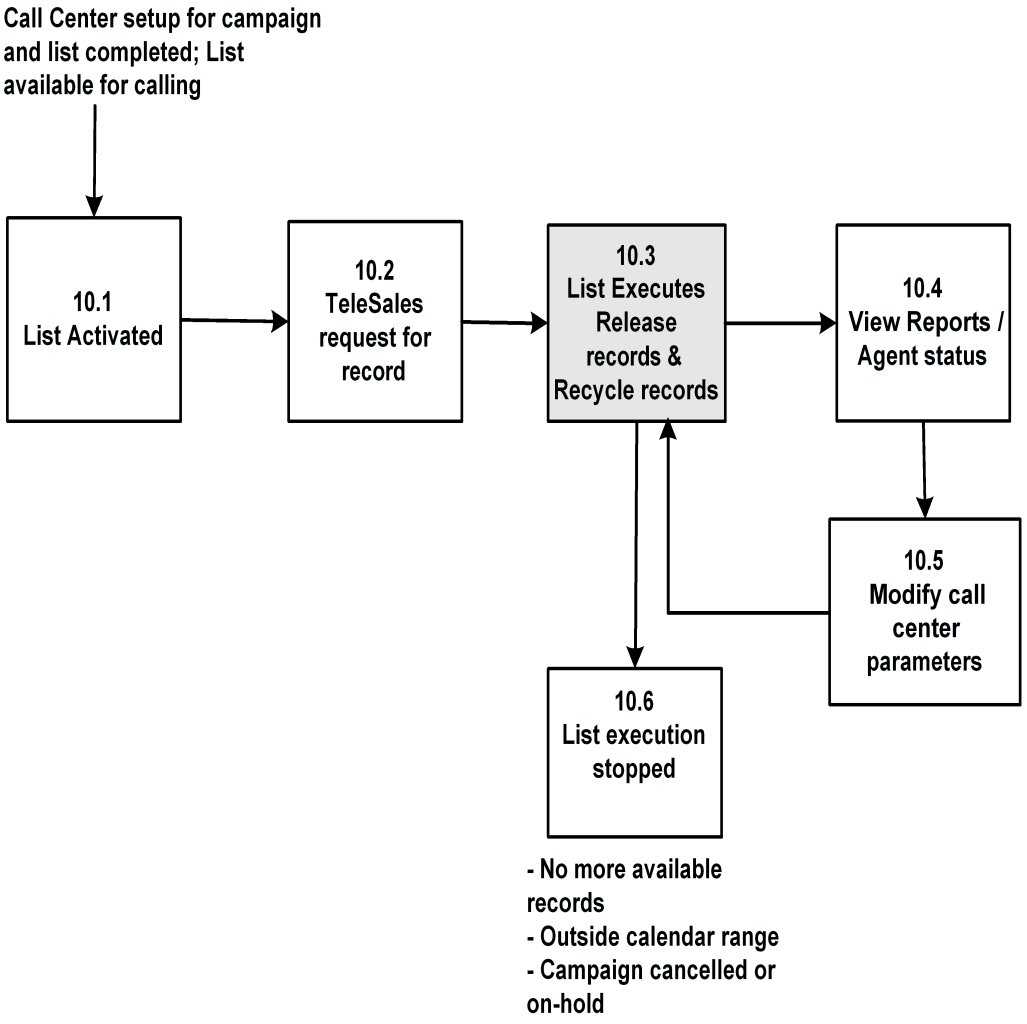
Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.6.3 List Execution Process

The following diagram shows the list execution process from list activation to when the list execution ends.



10.1 - List activation

10.2 - TeleSales requests the call record

10.3 - List executes (this area contains drill down information. See the Record Release Process topic.)

10.4 - View Reports / Agent Status

10.5 - Adjust call center calling parameters accordingly

10.6 - List execution stops

See Also:

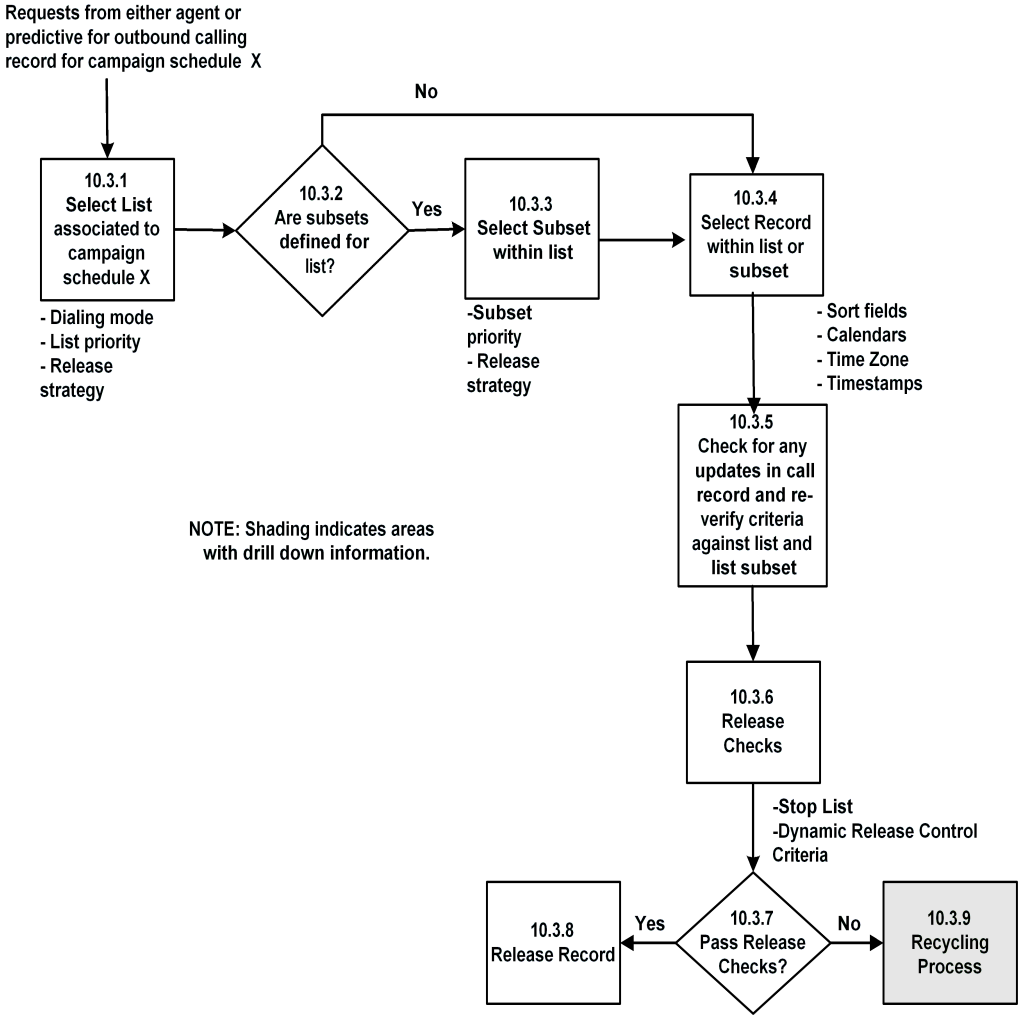
Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.6.4 Release Record Process

The following diagram shows the release record process.



10.3.1 - Select list associated with campaign

10.3.2 - Check if list is logically divided into subsets

10.3.3 - Select list subset

10.3.4 - Select record to be released

10.3.5 - Check for any updates to the record

10.3.6 - Check record against record filter criteria and stop lists

10.3.7 - Determine if record passes release check

10.3.8 - Release record

10.3.9 - Recycling process (this area contains drill down information. See the Recycling Process topic.)

See Also:

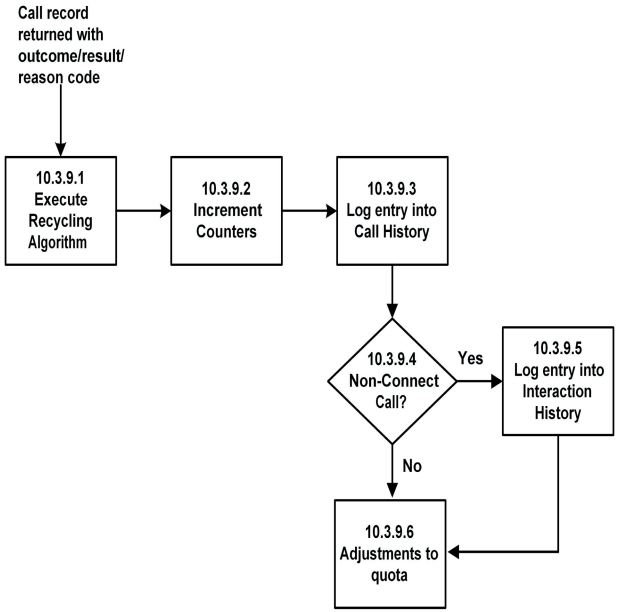
Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

1.6.5 Recycling Process

The following diagram shows the recycling process.



10.3.9.1 - Execute recycling algorithm

10.3.9.2 - Increment counters

10.3.9.3 - Log entry into call history

10.3.9.4 - Check if non-connect

10.3.9.5 - AODS writes IH records for those transactions terminated within the DialServer (such as phone calls with busy or no answer statuses).

10.3.9.6 - Adjust quota if necessary

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2

Administering Advanced Outbound From the HTML Admin Console

This interface allows you to perform such tasks as viewing the campaign schedules, creating or editing recycling and record filters, creating or modifying country and user defined calendars, creating or editing messages, and tuning system performance.

This topic group covers the following topics:

2.0.1 Viewing and Sorting Items

There are six tabs in the Advanced Outbound HTML Administration console, including: Campaign Schedules, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these tabpages contain sub-tab menus.

Use the steps below to view or sort the contents of a selected tabpage in the Advanced Outbound HTML Administration console.

Prerequisite:

In order to view or sort items in the AO HTML console, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. Click the tab you want to view.

   The selected tabpage appears, displaying a summary view table of its contents.

3. Click the subtab you want to view (if other than the default).

   The selected subtab window appears, displaying a summary view table of its contents.

Note: The AO HTML Administration console always defaults to the first subtab's contents.

4. If there are more items than can fit in the window, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.
5. Click the column header by which you want to sort the contents of the summary view table.

   Note: You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.
6. Click the arrow to reverse the sort order.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.2 Configuring Campaign Schedules for Interaction Center Execution

The Campaign Schedule tabpage displays a list of campaign schedules that have been targeted for executed in the interaction center. This window allows you to configure the call center specific parameters for the selected campaign schedule.

Use the steps below to configure campaign schedules for interaction center execution.

Prerequisite:

In order to campaign schedules for interaction center execution, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage. The Campaign Schedules tabpage is the default window for the Oracle Advanced Outbound HTML Administration console. When it appears, it displays a summary view table of campaign schedules.

2. From the Name column of the summary view table on the Campaign Schedules tabpage, click the name of the campaign schedule you want to configure for interaction center execution.

   The Call Center Campaign Schedule Details window appears, displaying a Call Center Parameters area and a Predictive Telephony Parameters area.

3. From the drop-down list in the Calendar field, select the user defined calendar you want to associate with the selected campaign schedule.

   Note: If predictive dialing will not be used, click **Update** after selecting the user defined calendar.

4. Click the CTI Disabled checkbox, if your Campaign Schedule is not CTI enabled.

5. Click the On Hold checkbox, if you wish to place your Campaign Schedule on hold.

   Note: Only Campaign Schedules with a status of **Active** can be placed on hold.

6. In the fields listed under the Predictive Telephony Parameters area, supply the following information:

   Note: You only need to enter information in the Predictive Telephony Parameters fields if the campaign schedule will use predictive dialing.

   a. In the Predictive Dialing Timeout field, type the number of seconds you wish to use.

Note: Valid values are between 15 and 45 seconds.

b. From the drop-down list in the Ring-No-Answer field, select the number of rings you want to allow before Advanced Outbound registers the call attempt as a RNA (Ring No Answer).

c. From the drop-down list in the Targeted Abandonment Rate field, select the maximum acceptable percentage for abandoned calls.

d. From the drop-down lists in the Special Intercept Tones summary view table, select whether to recycle or have the agent manually handle the following types of special intercept tones: Reorder Handling, Intercept Handling, Vacant Handling, and Network Busy Handling.

e. From the drop-down list in the Answering Machine Detection field, select the method by which the system detects answering machines, or select no answering machine detection.

Note: Selecting **No answer machine detection** will cause Advanced Outbound to forward answering machine calls to agents as live connections.

f. From the drop-down list in the Answering Machine Handling field, select how you want the call attempt handled if an answering machine is detected.

g. If you selected **Message** in the previous step, select the phone type and the message you want to play from the drop-down fields on the summary view table under the Answering Machine Handling field. Otherwise go to step h.

h. From the drop-down list in the Front Hold Message field, select whether or not you want to enable or disable Front Hold Messages.

Note: A front hold message is a message that is played when an agent is not available to take a call. Enabling front hold messaging will place the call on a front hold queue if no agents are available to take the call.

i. If you selected **Enable** in the previous step, select the phone type and message you want to play from the drop-down fields on the summary view table under the Front Hold Message field. Otherwise, go to step 7.

7. Click **Update**.

   You return to the Call Center Campaign Schedule Details window and a confirmation note is displayed, stating that the configuration was successful.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.3 Modifying the Campaign Schedule Configuration

Use the steps below to modify the configuration of campaign schedules for interaction center execution.

Prerequisite:

In order to modify the configuration of campaign schedules for interaction center execution, you must have Advanced Outbound administrator level rights.

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage. The Campaign Schedules tabpage is the default window for the Oracle Advanced Outbound HTML Administration console. When it appears, it displays a summary view table of campaign schedules.

2. From the Name column of the summary view table on the Campaign Schedules tabpage, click the name of the campaign schedule on which you want to modify the configuration.

   The Call Center Campaign Schedule Details window appears, displaying a Call Center Parameters area and a Predictive Telephony Parameters area.

3. From the drop-down list in the Calendar field, you can select a different user defined calendar you want to associate with the selected campaign schedule.

Note: If predictive dialing will not be used, click **Update** after selecting a different user defined calendar.

4. In the fields listed under the Predictive Telephony Parameters area, modify the following information:

Note: You only need to enter information in the Predictive Telephony Parameters fields if the campaign schedule will use predictive dialing.

a. From the drop-down list in the Ring-No-Answer field, you can select a different number of rings you want to allow before Advanced Outbound registers the call attempt as a no answer.

b. From the drop-down list in the Targeted Abandonment Rate field, you can select a different maximum acceptable percentage for abandoned calls.

c. From the drop-down lists in the Special Intercept Tones summary view table, you can select whether to recycle or have the agent manually handle the following types of special intercept tones: Reorder Handling, Intercept Handling, Vacant Handling, and Network Busy Handling.

d. From the drop-down list in the Answering Machine Detection field, you can select the accuracy level of detection, or select no answering machine detection.

Note: Selecting **No answer machine detection** will cause Advanced Outbound to forward answering machine calls to agents as live connections.

e. From the drop-down list in the Answering Machine Handling field, you can select how you want the call attempt handled if an answering machine is detected.

f. If you selected **Message** in the previous step, select the phone type and the message you want to play from the drop-down fields on the summary view table under the Answering Machine Handling field. Otherwise go to step g.

g. From the drop-down list in the Front Hold Message field, you can select whether or not you want to enable or disable Front Hold Messages.

Note: A front hold message is a message that is played when an agent is not available to take a call.

h. If you selected **Enable** in the previous step, select the phone type and message you want to play from the drop-down fields on the summary view table under the Front Hold Message field. Otherwise, go to step 5.

5. Click **Update**.

   You return to the Call Center Campaign Schedule Details window and a confirmation note is displayed, stating that the modification to the configuration was successful.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.4 Configuring List Dialing Parameters

Use the steps below to define the parameters necessary to setup a list (Marketing Online's target group) for outbound calling.

Prerequisite:

In order to modify the configuration of campaign schedules for interaction center execution, you must have Advanced Outbound administrator level rights.

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage. The Campaign Schedules tabpage is the default window for the Oracle Advanced Outbound HTML Administration console. When it appears, it displays a summary view table of campaign schedules.

2. From the Name column of the summary view table on the Campaign Schedules tabpage, click the name of the campaign schedule on which you want to modify the configuration.

   The Call Center Campaign Schedule Details window appears, displaying a Call Center Parameters area and a Predictive Telephony Parameters area.

3. From the side navigation bar, click **Campaign Schedule Lists**.

   The Interaction Center Campaign Schedule Lists window appears, displaying a summary view table of the list associated to the selected campaign schedule.

4. From the Name column of the summary view table, click the name of the list for which you want to configure dialing parameters.

   The Interaction Center Campaign Schedule List Details window appears.

5. From the drop-down list in the Dialing Method field, select the dialing method to use for the list, or select to default to the campaign schedule's dialing method.

6. From the drop-down list in the List Priority field, select the priority you want to assign the list.

   Note: Priorities determine the relative priority of a list or subset in comparison to other lists and subsets.

   Highest through Medium level priorities are preemptive; all lists with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these lists will release its quantum of records, then the next list in the same priority level will be used.

   ---

7. From the drop-down list in the Recycling Algorithm field, select the recycling algorithm you want to use for the list.

8. From the drop-down list in the Record Filter field, select a record filter rule to use with the list.

9. From the drop-down list in the Validation Rule field, select a validation rule to use with the list.

10. From the drop-down list in the Calendar field, select a user defined calendar to use with the list.

11. From the drop-down list in the Release Strategy field, select a release strategy to use with the list.

Note: The quantum release strategy supports proportional calling across all lists and subsets associated with the campaign strategy and it is considered the baseline strategy for an Advanced Outbound service. This means that when Advanced Outbound is distributing customer records to agents, it releases a quantum number of records from each list or subset before it goes on to the next list or subset in the campaign.

The Quota Release Strategy stops releasing records from a list or subset when a pre-defined limit has been reached. This strategy disburses records from a list or subset based on the quota that is assigned to a list or subset.

12. Depending on your selection in the previous step, type the number of records you want to set as your limit in either the Quantum or Quota field.

    Note: If you selected **Quota** in step 11, you must select the hour and minute reset period from the drop-down list in each respective field. These fields specify the hours and minutes before the quota value is reset to zero (0).

13. From the drop-down lists in the summary view fields for Sort Order, select the field name for each field by which you want to sort, and whether you want to sort in ascending or descending order.

    Note: Sort order provides the ability to define an order in which records within a list will be organized. The order of the records will determine the order in which records are selected for release.

14. Click **Update**.

    The Interaction Center Campaign Schedule List Details windows updates to reflect the new dialing parameters and displays a confirmation stating that the dialing parameters have been configured successfully.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.5 Creating List Subsets

A subset is a set of entries within a list identified by field values. Subsets are dynamic, and can be created and deleted at will within the context of a list. They allow you to logically sub-divide an OMO list.

When subsets are used, a default subset is created that contains any list entries not contained in the user-defined subsets. List entries existing in subsets that overlap are available to all subsets until they are released. Each subset can be given its own priority, quantum, or quota value.

You create list subsets by designating conditions. When records meet the designated conditions they are placed in the list subset. Conditions are composed of three parts:

- A field
- An operator
- A field value

Conditions are structured in the following order: *field operator field value.*

For example:

ADDRESS contains VA - where *ADDRESS* is the field, *contains* is the operator, and *VA* is the field value.

Use the steps below to create list subsets in Oracle Advanced Outbound.

Prerequisite:

In order to create list subsets, you must have Advanced Outbound administrator level rights.

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage. The Campaign Schedules tabpage is the default window for the Oracle Advanced Outbound HTML Administration console. When it appears, it displays a summary view table of campaign schedules.

2. From the Name column of the summary view table on the Campaign Schedules tabpage, click the name of the campaign schedule under which the lists for which you want to create subsets reside.

   The Call Center Campaign Schedule Details window appears, displaying a Call Center Parameters area and a Predictive Telephony Parameters area.

3. From the side navigation bar, click **Campaign Schedule Lists**.

   The Interaction Center Campaign Schedule Lists window appears, displaying a summary view table of all existing lists associated to the selected campaign schedule.

4. From the Name column of the summary view table, click the name of the list for which you want to create subsets.

   The Interaction Center Campaign Schedule List Details window appears and the side navigation bar expands to include a List Details section.

5. From the side navigation bar, click **List Subsets**.

   The Interaction Center Campaign Schedule List Subsets window appears, displaying a summary view table of all existing list subsets for the selected list.

6. On the Interaction Center Campaign Schedule List Subsets window, click **Create**.

   The Create Subset window appears.

7. In the Subset Name field, type a name for the new subset.

   Note: Subset names have a 64 character limit and only the following characters are supported:

   - A-Z
   - 0-9
   - underscore, space, and hyphen

8. From the drop-down list in the List Priority field, select the priority you want to assign the subset.

Note: Priorities determine the relative priority of a subset in comparison to other subsets. It is similar to List Priority however applied at a subset level.

Subset priority provides the ability to define the order in which the outbound list manager will check to determine if records are available for the release. List priority order will be examined first, then within the selected list, the subset priority will be examined to determine the subset from which a record is to be selected.

Highest through Medium level priorities are preemptive; all list subsets with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these list subsets will release its quantum of records, then the next list subset in the same priority level will be used.

9. From the drop-down list in the Release Strategy field, select a release strategy to use with the subset.

Note: Subset release strategy is similar to list release strategy however applied at a subset level. The release strategy influences the number of records to be released from a subset based on a number of parameters -- quantum, and quota.

The quantum release strategy supports proportional calling across all lists and subsets associated with the campaign strategy and it is considered the baseline strategy for an Advanced Outbound service. This means that when Advanced Outbound is distributing customer records to agents, it releases a quantum number of records from each list or subset before it goes on to the next list or subset in the campaign.

The Quota Release Strategy stops releasing records from a list or subset when a pre-defined limit has been reached. This strategy disburses records from a list or subset based on the quota that is assigned to a list or subset.

10. Depending on your selection in the previous step, type the number of records you want to set as your limit in either the Quantum or Quota field.

Note: If you selected **Quota** in step 9, you must select the hour and minute reset period from the drop-down list in each respective field. These fields specify the hours and minutes before the quota value is reset to zero (0).

11. Click **Next**.

    The Create List Subset Selection Criteria window appears, displaying a summary view table for selection criteria conditions.

12. In the Field column, type the name of the field you want to use as the condition for the selection criteria.

    Note: If you are not sure of the field name, you can click the flashlight icon. Doing so will open the Select a Field dialog box, in which you can search for and select a field name.

13. From the drop-down list in the Operator column, select the operator you want to use for your subset condition.

14. In the Field Value column, type the value you want to use for your subset condition.

15. Click **Create**.

    Note: If you want to add multiple conditions to the condition statement, repeat steps 12-14 in the next set of fields below the ones for your current condition, but remember to select how you want the conditions joined from the drop-down list in the Expressions Joined By field before clicking **Create**.

    The Interaction Center Campaign Schedule List Subsets appears, displaying the new subset in the summary view table.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.6 Modifying List Subsets

Use the steps below to modify list subsets in Advanced Outbound.

Prerequisite:

In order to modify list subsets, you must have Advanced Outbound administrator level rights.

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage. The Campaign Schedules tabpage is the default window for the Oracle Advanced Outbound HTML Administration console. When it appears, it displays a summary view table of campaign schedules.

2. From the Name column of the summary view table on the Campaign Schedules tabpage, click the name of the campaign schedule under which the lists for which you want to modify subsets reside.

   The Call Center Campaign Schedule Details window appears, displaying a Call Center Parameters area and a Predictive Telephony Parameters area.

3. From the side navigation bar, click **Campaign Schedule Lists**.

   The Interaction Center Campaign Schedule Lists window appears, displaying a summary view table of all existing lists associated to the selected campaign schedule.

4. From the Name column of the summary view table, click the name of the list for which you want to modify subsets.

   The Interaction Center Campaign Schedule List Details window appears and the side navigation bar expands to include a List Details section.

5. From the side navigation bar, click **List Subsets**.

   The Interaction Center Campaign Schedule List Subsets window appears, displaying a summary view table of all existing list subsets for the selected list.

6. From the Subset Name column of the summary view table, click the name of the subset you want to modify.

   The List Subset Details window appears.

7. Edit the fields as needed.

a. To modify the subset priority: from the drop-down list in the Priority field, select a new subset priority. Click **Update** if you are finished modifying the subset.

Note: Priorities determine the relative priority of a subset in comparison to other subsets. It is similar to List Priority however applied at a subset level.

Subset priority provides the ability to define the order in which the outbound list manager will check to determine if records are available for the release. List priority order will be examined first, then within the selected list, the subset priority will be examined to determine the subset from which a record is to be selected.

Highest through Medium level priorities are preemptive; all list subsets with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these list subsets will release its quantum of records, then the next list subset in the same priority level will be used.

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b. To modify the subset release priority: from the drop-down list in the Release Strategy field, select a new release strategy for the subset. Click **Update** if you are finished modifying the subset.

Note: Subset release strategy is similar to list release strategy however applied at a subset level. The release strategy influences the number of records to be released from a subset based on a number of parameters -- quantum, and quota.

The quantum release strategy supports proportional calling across all lists and subsets associated with the campaign strategy and it is considered the baseline strategy for an Advanced Outbound service. This means that when Advanced Outbound is distributing customer records to agents, it releases a quantum number of records from each list or subset before it goes on to the next list or subset in the campaign.

The Quota Release Strategy stops releasing records from a list or subset when a pre-defined limit has been reached. This strategy disburses records from a list or subset based on the quota that is assigned to a list or subset.

c. Depending on your selection in the previous step, type the number of records you want to set as your limit in either the Quantum or Quota field.

Note: If you selected **Quota** in step b, you must select the hour and minute reset period from the drop-down list in each respective field. These fields specify the hours and minutes before the quota value is reset to zero (0). Click **Update** if you are finished modifying the subset.

d. To modify the selection criteria: click **Edit** (located below the Selection Criteria field). When the Edit List Subset Selection Criteria window appears, modify the field, operator, or field values as needed. If you are finished modifying the subset, click **Update**, then click **Done**.

Note: For more detailed steps on adding field, operator, and field values, see steps 12-14 in the Creating List Subsets topic.

The Interaction Center Campaign Schedule List Subsets appears and the modified subset is displayed in the summary view table.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.7 Removing List Subsets

Use the steps below to remove list subsets in Advanced Outbound.

Prerequisite:

In order to remove list subsets, you must have Advanced Outbound administrator level rights.

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage. The Campaign Schedules tabpage is the default window for the Oracle Advanced Outbound HTML Administration console. When it appears, it displays a summary view table of campaign schedules.

2. From the Name column of the summary view table on the Campaign Schedules tabpage, click the name of the campaign schedule under which the lists from which you want to remove subsets reside.

   The Call Center Campaign Schedule Details window appears, displaying a Call Center Parameters area and a Predictive Telephony Parameters area.

3. From the side navigation bar, click **Campaign Schedule Lists**.

   The Interaction Center Campaign Schedule Lists window appears, displaying a summary view table of all existing lists associated to the selected campaign schedule.

4. From the Name column of the summary view table, click the name of the list from which you want to remove subsets.

   The Interaction Center Campaign Schedule List Details window appears and the side navigation bar expands to include a List Details section.

5. From the side navigation bar, click **List Subsets**.

   The Interaction Center Campaign Schedule List Subsets window appears, displaying a summary view table of all existing list subsets for the selected list.

6. From the Remove column of the summary view table, click the checkbox for the subset you want to remove.
7. Click **Update**.

   The selected list subset is removed and the Interaction Center Campaign Schedule List Subsets window displays a confirmation note stating that the update was successful.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.8 Creating Recycling Algorithms

Recycling is the process of determining how to process records that have been dialed. When a record is returned, a user-definable recycling algorithm is executed, which looks at the record, the call results, and previous calls to the record.

When creating a recycling algorithm, you must first decide whether you will use an existing algorithm as a model for your new one, or whether you want to create a completely new algorithm. If an existing algorithm contains relatively similar pre or post-processing actions, conditions or sub-conditions, you should use it as a basis for your new algorithm. The Advanced Outbound HTML Administration console allows you to do this by permitting you to copy existing algorithms. If your new algorithm will be significantly different from any existing ones, you should create a completely new algorithm.

You must then add or modify pre or post-processing actions (not required), or the conditions or sub-conditions for the algorithm. You then need to add an action for each condition or sub-condition. These actions will determine how the record is handled if the condition or sub-condition under which you add it is met.

Important: Each condition or sub-condition must have an associated action or you will receive an error.

There are two ways to create a recycling algorithm:

- by copying an existing recycling algorithm
- by creating a completely new recycling algorithm

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.8.1 Creating Recycling Algorithms by Copying an Existing Algorithm

Use the steps below to create recycling algorithms by copying existing algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to create recycling algorithms, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. On the Algorithms tabpage, click **Create**.

   The Recycling Algorithm Creation window appears.

4. On the Recycling Algorithm Creation window, type a name for the new recycling algorithm in the Algorithm Name field.

   Note: Algorithm names have a 64 character limit and only the following characters are supported:

   - A-Z
   - 0-9
   - underscore, space, and hyphen

   ---

5. Click the **Copy From Existing Algorithms** radio button and from the drop-down list in the provided field, select the existing algorithm you want to copy.
6. Click **Create**.

   The new recycling algorithm is created.

   The Recycling Algorithm Detail window appears, displaying the summary view of the algorithm conditions.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.8.2 Creating Completely new Recycling Algorithms

Use the steps below to create completely new recycling algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to create recycling algorithms, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.
2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.
3. On the Algorithms tabpage, click **Create**.

   The Recycling Algorithm Creation window appears.
4. On the Recycling Algorithm Creation window, type a name for the new recycling algorithm in the Algorithm Name field.

Note: Algorithm names have a 64 character limit and only the following characters are supported:

- A-Z
- 0-9
- underscore, space, and hyphen

5. Click the **Create New Algorithm** radio button and from the drop-down list in the Select Source Type field, select the source type you want to use.

   Note: Source types define how fields from the database (typically TCA) map to the columns of a list entry.

   Oracle Advanced Outbound recycling algorithms are directly associated to source types because they define which fields are present in a list.

   Oracle Advanced Outbound supports two source types:

   - B to B - Business to Business (ORGANIZATION_CONTACT_LIST)
   - B to C - Business to Consumer (PERSON_LIST)

6. Click **Create**.

   The new recycling algorithm is created.

   The Recycling Algorithm Detail window appears, displaying the summary view of the algorithm conditions. Since this is a new algorithm, no existing pre or post-processing actions, or add algorithm conditions should be displayed.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.9 Removing Recycling Algorithms

Use the steps below to remove recycling algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to remove recycling algorithms, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. In the Remove column, click the checkbox for the recycling algorithm you want to remove.

4. Click **Update**.

   The selected recycling algorithm is removed.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.10 Adding Pre or Post-Processing Actions

Recycling algorithms utilize pre and post-processing actions to determine what happens to records before and after (respectively) the conditions apply.

Pre and post-processing actions are PL/SQL statements. The pre and post-processing areas in the Advanced Outbound HTML Admin console allow you to access and utilize these PL/SQL statements. These PL/SQL statements allow you to do virtually anything you want before or after (respectively) the conditions of the recycling algorithm - check for any condition you want and then take action based

on the checked conditions, or initialize or clear variables needed during the recycling process. If pre or post-processing actions have been defined for the condition or are present in the condition, they will be executed.

Use the steps below to add pre or post-processing actions to existing recycling algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to add pre or post-processing actions, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm, to which you can add the pre or post-processing actions.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add pre or post-processing actions.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

4. From the Recycling Algorithm Details window, click **Pre-Processing Action(s)** to add pre-processing actions, or **Post-Processing Action(s)** to add post-processing actions.

   The Edit Recycling Algorithm Action window appears, displaying a summary view table for pre or post-processing actions (depending on what you clicked in step 4).

5. From the Action column of the summary view table, click the drop-down arrow and select the action you want to add and click **Update**.

Note: Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the drop-down list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

The selected action is added and the summary view table updates to show the new action.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.11 Removing Pre or Post-Processing Actions

Use the steps below to remove pre or post-processing actions from existing recycling algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to remove pre or post-processing actions, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm with at least one existing pre or post-processing actions.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add pre or post-processing actions.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

   Note: If this is a new algorithm, the summary view will not contain any actions or conditions.

4. From the Recycling Algorithm Details window, click **Pre-Processing Action(s)** to remove pre-processing actions, or **Post-Processing Action(s)** to remove post-processing actions.

   The Edit Recycling Algorithm Action window appears, displaying a summary view table for pre or post-processing actions (depending on what you clicked in step 4).

5. In the Remove column, click the checkbox for the pre or post-processing action you want to remove.

6. Click **Update**.

   The selected pre or post-processing action is removed.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.12 Adding Algorithm Conditions

Conditions and sub-conditions determine how the algorithm processes records that have been dialed. Conditions and sub-conditions are composed of three parts:

- A condition
- An operator
- A value

To avoid confusion, since the first component of the algorithm condition being added is also called a condition, we refer to the entire statement (condition,

operator, and value) as an expression for the purposes of this guide. Expressions are structured in the following order: *condition operator value.* For example: *STATUS contains ACTIVE* (where *STATUS* is the condition, *contains* is the operator, and *ACTIVE* is the value), or: *HOUSEHOLD_SIZE greater than 3* (where *HOUSEHOLD_SIZE* is the condition, *greater than* is the operator, and *3* is the value).

The Oracle Advanced Outbound HTML Administration console displays expressions and their sub-conditions in a treeview model.

Example:

Condition 1

    Sub-condition 1

    Sub-condition 2

Condition 2

    Sub-condition 1

In the above example, Condition 1 and Condition 2 are top level conditions. If you want to have more than one expression in a single condition, it is very important how the expressions are joined (by AND or by OR).

If you want to have multiple top level conditions in your recycling algorithm, their order is very important. Once a condition is met, Oracle Advanced Outbound ignores all other conditions at the same level and only completes execution for the process within that condition block. In the above example, if Condition 1 is met, then Condition 2 (and Sub-condition 1 under Condition 2) will be ignored.

Use the steps below to add algorithm conditions (expressions) to existing recycling algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to add algorithm conditions, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm, to which you can add the conditions.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

   Note: If this is a new algorithm, the summary view will not contain any actions or conditions.

4. From the Recycling Algorithm Details window, click **Root**.

   The Recycling Algorithm Condition Details window appears, displaying two areas:

   - a Sub-Conditions area
   - an Actions if no sub-condition met area

5. Under the Sub-Conditions heading, click **Insert Condition**.

   The Edit Recycling Algorithm Condition window appears, displaying a summary view table for algorithm conditions.

6. From the Expression column, click the drop-down arrow and select the condition you want from the list and click **Update**.

   The Expression column expands with additional fields, to allow you to enter the operator and value for the condition.

7. From the drop-down field directly after the condition statement, select the operator you want to use for your expression.

8. From the last drop-down field, select the value you want to use for your expression and click **Update.**

   The summary view table updates to show your new expression.

Note: If you want to add multiple expressions to the condition statement, repeat steps 6-8 in the next set of fields below the ones for your current expression, but remember to select how you want the expressions joined from the drop-down list in the Expressions Joined By field before clicking **Update**.

Note: If you want to add additional conditions, repeat steps 5-8 for each additional condition.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.13 Modifying Algorithm Conditions

Use the steps below to modify recycling algorithm conditions in Oracle Advanced Outbound.

Prerequisite:

In order to modify recycling algorithm conditions, you must have Advanced Outbound administrator level rights. Existing algorithm conditions must also be present.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name under which the condition you want to modify resides.

   The Recycling Algorithm Details window appears, displaying the summary view of the recycling algorithm.

4. Click **Root**.

   Note: To modify conditions, you must click the next highest level. For example, if you have a condition listed under the Root level, you must click **Root** to modify the condition.

   The Recycling Algorithm Condition Details window appears, displaying a list of all existing top level conditions under it.

   a. To modify the order of the condition statements (if there is more than one condition under the selected level): click the blue sort arrow that appears in front of the condition text you wish to move. Clicking the arrow will move that condition up or down one place (depending on which way the arrow is facing).

   b. To modify the condition: click **Edit** for the condition you want to edit. When the Edit Recycling Algorithm Condition window appears, you can modify the operator and value of the expression by making new selections from the drop-down list for each, then clicking **Update**.

   c. To add multiple expressions to the condition statement: in the next set of fields below the ones for your current expression, repeat steps 6-8 from the Adding Algorithm Conditions topic. Remember to select how you want the expressions joined from the drop-down list in the Expressions Joined By field before clicking **Update**.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.14 Deleting Algorithm Conditions

Use the steps below to delete algorithm conditions from existing recycling algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to delete algorithm conditions, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm with at least one existing condition, sub condition, or action.

> **Note:** A condition must have at least one sub-condition or action. Therefore, the Oracle Advanced Outbound HTML Administrator console will not allow you to delete the only condition if no sub-conditions or actions are present. The only way to delete a condition that contains no sub-conditions or actions is to delete the entire algorithm.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to delete conditions.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

4. From the list of existing recycling algorithms, click **Root** to access the top level conditions.

   The Recycling Algorithm Condition Details window appears, displaying all the existing top level conditions.

5. From the Recycling Algorithm Condition Details window, click **Delete** for the condition you want to delete.

   The selected condition is deleted.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.15 Adding Algorithm Sub-Conditions

Sub-conditions allow you to further refine how each condition in your algorithm handles dialed records. For example, you could have the following condition statement:

- Outcome code equal to No Answer

For this condition statement you could add sub-conditions that further define how the condition processes dialed records. For example, you could add the following sub-conditions to the Outcome code equals No Answer condition:

- Call attempt equal to One
- Call attempt equal to Two
- Call attempt equal to Three

By adding these sub-conditions, you can establish a different handling procedure for each calling attempt. Each of these sub-conditions will need an action added to it to determine how Advanced Outbound handles the call attempt if none of the sub-conditions are met. For more information on adding actions, refer to the Adding Actions if no Sub-Conditions are met topic.

Follow the steps below to add sub-conditions to existing recycling algorithm conditions.

Prerequisite:

In order to add algorithm conditions, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm and existing condition, to which you can add the sub-conditions.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

4. From the Recycling Algorithm Details window, click **Condition** (for the condition statement to which you want to add a sub-condition).

   The Recycling Algorithm Condition Details window appears, displaying two areas:

   - a Sub-Conditions area
   - an Actions if no sub-condition met area

5. Under the Sub-Conditions heading, click **Insert Condition**.

   The Edit Recycling Algorithm Condition window appears, displaying a summary view table for algorithm conditions.

6. From the Expression column, click the drop-down arrow and select the condition you want from the list and click **Update**.

   The Expression column expands with additional fields, to allow you to enter the operator and value for the condition.

7. From the drop-down field directly after the condition statement, select the operator you want to use for your expression.

8. From the last drop-down field, select the value you want to use for your expression and click **Update.**

   The summary view table updates to show your new expression.

Note: If you want to add multiple expressions to the condition statement, repeat steps 6-8, but remember to select how you want the expressions joined from the drop-down list in the Expressions Joined By field before clicking **Update**.

Note: If you want to add additional conditions, repeat steps multiple expressions to the condition statement, repeat steps 5-8 for each additional condition.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.16 Modifying Algorithm Sub-Conditions

Use the steps below to modify recycling algorithm sub-conditions in Oracle Advanced Outbound.

Prerequisite:

In order to modify recycling algorithm sub-conditions, you must have Advanced Outbound administrator level rights. Existing algorithm sub-conditions must also be present.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name under which the condition you want to modify resides.

   The Recycling Algorithm Details window appears, displaying the summary view of the recycling algorithm.

4. Click **Condition:** for the condition one level above the sub-condition you want to modify.

Note: To modify conditions, you must click the next highest level. For example, if you have a sub-condition listed under a top level condition, you must click **Condition:** for the top level condition to modify the sub-condition under it.

The Recycling Algorithm Condition Details window appears, displaying a list of all existing sub-conditions under the condition you clicked.

a. To modify the order of the condition statements (if there is more than one sub-condition under the selected level): click the blue sort arrow that appears in front of the condition text you wish to move. Clicking the arrow will move that condition up or down one place (depending on which way the arrow is facing).

b. To modify the sub-condition: click **Edit** for the sub-condition you want to edit. When the Edit Recycling Algorithm Condition window appears, you can modify the operator and value of the expression by making new selections from the drop-down list for each, then clicking **Update**.

c. To add multiple expressions to the sub-condition statement: in the next set of fields below the ones for your current expression, repeat steps 6-8 from the Adding Algorithm Sub-Conditions topic. Remember to select how you want the expressions joined from the drop-down list in the Expressions Joined By field before clicking **Update**.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.17 Deleting Algorithm Sub-Conditions

Use the steps below to delete algorithm conditions from existing recycling algorithms in Oracle Advanced Outbound.

Prerequisite:

In order to delete algorithm conditions, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm with at least one existing condition, sub condition, or action.

Note: A sub-condition must have at least one sub-condition or action. Therefore, the Oracle Advanced Outbound HTML Administrator console will not allow you to delete the only sub-condition if no other sub-conditions or actions are present. The only way to delete a condition that contains no sub-conditions or actions is to delete the entire algorithm.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to delete sub-conditions.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

4. From the list of existing recycling algorithms, click **Condition:** for the algorithm condition one level *above* the sub-condition you want to delete.

   The Recycling Algorithm Condition Details window appears, displaying all the existing sub-conditions under the selected condition.

5. From the Recycling Algorithm Condition Details window, click **Delete** for the sub-condition you want to delete.

   The selected sub-condition is deleted.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.18 Adding Actions if no Sub-Conditions are met

Actions if no sub-conditions are met are PL/SQL actions that you can add to the root level, a condition, or a sub-condition that establish a method of handling the record in the event the top level conditions or sub-conditions under that top level condition are not met. If a condition or sub-condition is met, it's associated action will be utilized. However if no conditions or sub-conditions are met, none of their actions will be utilized; therefore, you must add an action if no sub-conditions are met to handle these occasions.

For example, if you had the following condition and sub-condition statement:

Condition 1: Outcome code equal to No Answer

Sub-condition 1: Call attempt equal to One

Sub-condition 2: Call attempt equal to Two

Sub-condition 3: Call attempt equal to Three

To each of these sub-conditions you can add an action which will determine what happens to the record if no sub-condition are met. For the first call attempt, you could add an action of **Call back next Monday**. For the second attempt, you could add an action of **Call back next Saturday at 11:30**. For the third call attempt, you could add an action of **Call back next week**. By adding an action for each sub-condition, you can set up different processing paths for each separate call attempt.

Use the steps below to add actions if no sub-conditions are met to existing algorithm conditions or sub-conditions in Oracle Advanced Outbound.

Prerequisite:

In order to add actions if no sub-condition is met, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm, to which you can add the actions.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

   Note: If this is a new algorithm, the summary view will not contain any actions or conditions.

4. From the Recycling Algorithm Details window, click **Root** (if you want to add actions to a top level condition), or click **Condition:** for the condition under which the sub-condition to which you want to add an action resides.

   The Recycling Algorithm Condition Details window appears, displaying two areas:

   - a Sub-Conditions area
   - an Actions if no sub-condition met area

5. Under the Actions if no sub-condition met field, click **Insert Action**.

   The Edit Recycling Algorithm Action window appears, displaying a summary view table for actions.

6. From the Action column of the summary view table, click the drop-down arrow and select the action you want to add and click **Update**.

   Note: Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the drop-down list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

   The selected action is added and the summary view table updates to show the new action.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.19 Modifying Actions if no Sub-Conditions are met

Use the steps below to modify actions if no sub-conditions are met in existing algorithm conditions or sub-conditions in Oracle Advanced Outbound.

Prerequisite:

In order to modify actions if no sub-condition is met, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm with actions.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to modify actions if no sub-condition are met.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

4. From the Recycling Algorithm Details window, click **Root** (if you want to modify actions from a top level condition), or click **Condition:** for the condition under which the sub-condition in which you want to modify an action resides.

   The Recycling Algorithm Condition Details window appears, displaying two areas:

   - a Sub-Conditions area

- an Actions if no sub-condition met area

5. From the Sub-Conditions met area, click the condition expression under which the action you want to modify resides.

   Note: If the action is linked to the root level of the condition, it will appear under the Actions if no sub-condition met area. You do not need to click a condition expression. You can modify the action directly from this window by clicking **Edit**.

   The Recycling Algorithm Conditions window updates to display any existing sub-conditions or actions under the condition expression you clicked.

6. Under the Actions if no sub-condition met area, click **Edit** for the action you want to modify.

   a. To modify the order of the actions (if there is more than one action): click the blue sort arrow that appears in front of the action text you wish to move. Clicking the arrow will move that action up or down one place (depending on which way the arrow is facing).

   b. To modify the action: click **Edit** for the action you want to modify. When the Edit Recycling Algorithm Action window appears, you can modify the action by making new selections from the drop-down list for its components, then clicking **Update**.

   c. To add additional actions: from the Action column of the summary view table, click the drop-down arrow in the field *below* the existing action and select the action you want to add and click **Update**.

      Note: Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the drop-down list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

   The selected action is modified and the summary view table updates to show the modified action.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.20 Deleting Actions if no Sub-Conditions are met

Use the steps below to delete actions if no sub-conditions are met from existing algorithm conditions or sub-conditions in Oracle Advanced Outbound.

Prerequisite:

In order to delete actions if no sub-condition is met, you must have Advanced Outbound administrator level rights. You must also have an existing algorithm with actions.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to delete actions if no sub-condition are met.

   The Recycling Algorithm Detail window appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

4. From the Recycling Algorithm Details window, click **Root** (if you want to delete actions from a top level condition), or click **Condition:** for the condition under which the sub-condition from which you want to delete an action resides.

   The Recycling Algorithm Condition Details window appears, displaying two areas:

   - a Sub-Conditions area

- an Actions if no sub-condition met area

5. From the Sub-Conditions met area, click the condition expression under which the action you want to delete resides.

> **Note:** If the action is linked to the root level of the condition, it will appear under the Actions if no sub-condition met area. You do not need to click a condition expression. You can delete the action directly from this window by clicking **Delete**.

The Recycling Algorithm Condition Details window updates to display any existing sub-conditions or actions under the condition expression you clicked.

6. Click **Delete** for the action you want to delete.

The selected action is deleted.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.21 Creating Record Filters

Record filters are filters against which records are checked at the point of release. Record filters are created and applied to lists. They are able to check fields of list entries. Record filters check release fields to ensure they match defined parameters (STATE equal to Virginia). A match here will prevent the release of the record.

The record filter process occurs after a record is selected and provides a last minute means to filter records from being called. If a record does not pass the release checkpoint process, the record will be recycled according to the rules defined for recycling processing.

The release criterion should be defined in an SQL statement where any field(s) available in AMS_LIST_ENTRIES table may be used as a criterion.

Record filters utilize expressions in a similar manner as recycling algorithms. However, instead of being called conditions, they are called rules. They use the following three components:

- Field

- Operator
- Value

Record filter rules are structured in the following order: *field operator value.* For example: *PERSON_FIRST_NAME equal to James* (where *PERSON_FIRST_NAME* is the field, *equal to* is the operator, and *James* is the value). The combination of these three elements (field, operator, and value) is called an expression.

The Oracle Advanced Outbound HTML Administration console displays rules in an alphanumeric hierarchy.

Example:

Rule 1

PERSON_LAST_NAME begins with W OR PERSON_LAST_NAME begins with B

AND PERSON_FIRST_NAME equal to James

OR Rule 2

PARTY_ID greater than 1200 AND PARTY_ID less than 2500

OR Rule 3

CUSTOMER_KEY has a value

In the above example, the lines under each rule are conditions for that rule.You can have multiple expressions in a single condition (as seen under Rule 2) and you can have multiple conditions under a single rule (as seen in Rule 1). If you want to have more than one expression in a condition, or more than one condition in a rule, it is very important how the they are joined together (by AND or by OR).

Separate top level rules are *only* joined together by **OR**; however multiple expressions within a single condition, and multiple sub-conditions within a single rule can be joined by either **AND** or **OR**.

If you want to have multiple top level rules in your recycling algorithm, their order is very important. Once a rule is met, Oracle Advanced Outbound ignores all other rules at the same level and only completes execution for the process within that set of rules. In the above example, if Rule 1 is met, then Rule 2 and Rule 3 are ignored.

Use the steps below to create record filters in Oracle Advanced Outbound.

Prerequisite:

In order to create record filters, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. On the Algorithms tabpage, click the **Record Filters** sub-tab.

   The Record Filters window appears, displaying a list of the existing record filters.

4. On the Record Filters window, click **Create**.

   The New Record Filter window appears.

5. In the Algorithm Name field, type a name for the new record filter.

   Note: Record filter names have a 64 character limit and only the following characters are supported:

   - A-Z
   - 0-9
   - underscore, space, and hyphen

6. In the Select Source Type field, click the drop-down arrow and select the source type you want to use.

Note: Source types define how fields from the database (typically TCA) map to the columns of a list entry.

Oracle Advanced Outbound recycling algorithms are directly associated to source types because they define which fields are present in a list.

Oracle Advanced Outbound supports two source types:

- B to B - Business to Business (ORGANIZATION_CONTACT_LIST)
- B to C - Business to Consumer (PERSON_LIST)

Note: You can click **Clear** to delete the algorithm name and selected source type.

7. Click **Next**.

   The Record Filter Rules window appears.

8. On the Record Filter Rules window, click **Insert Rule**.

   The Record Filter Create Rule window appears, displaying a summary view table for record filter conditions.

   Note: If this is a new record filter, the summary view will not contain any record filters.

9. From the Field column, type the name of the record field against which you want to run the record filters.
10. From the Operator column, click the drop-down arrow and select the operator you want to use in your record filters from the list.
11. From the Value field, type the value you want to use for your record filters.
12. Click **Create**.

    The Record Filter Edit Rule window updates to display a confirmation note, stating that the record filter rule was created successfully.

13. If you want to add additional expressions to the same condition: repeat steps 9-12 in the next set of fields below the current expression, and click **Create**.
14. If you want to add additional conditions to the same rule:
    a. From the drop-down list in the Add field, select the number of additional conditions you want to add, and click **Go**.

       The Record Filter Create Rule window updates to display a second summary view table, in which you can create additional conditions for the record filter rule.

    b. Repeat steps 9-12 (in the new summary view table fields), and click **Create**.
15. Click **Done**.

    The Record Filter Rules window appears, displaying the new rule(s).

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.22 Modifying Record Filters

Use the steps below to modify record filters in Oracle Advanced Outbound.

Prerequisite:

In order to modify record filters, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.
2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. On the Algorithms tabpage, click **Record Filter**.

   The Record Filters window appears, displaying a summary view table of the existing record filters.

4. From the Name column in the summary view table, click the name of the record filter you want to modify.

   The Record Filter Details window appears, displaying all of the existing rules and conditions for the selected record filter.

5. Click **Edit**.

   The Record Filter Rules window appears, displaying a list of all the existing rules.

6. From the list of rules, click Edit for the rule you want to modify.

   The Record Filter Edit Rule window appears, displaying a summary view table for the rule conditions under that rule.

7. Make the modifications you want to the expression or condition.

   a. To change how expressions are joined together in the condition (if you have more than one expression): click the **AND** or the **OR** radio button in the Join Condition area (at the top of the summary view table), and click **Update**.

   b. To remove an expression from a condition, or a condition from a rule: in the Remove column of the summary view table, click the checkbox for the expression or condition you want to remove, and click **Update**.

   c. To modify any of the components of an expression: enter a new field name in the Field field, select a new operator from the drop-down list in the Operator field, or type new information in the Value field, and click **Update**.

   The Record Filter Edit Rule window updates to display a confirmation note stating that the record filter was updated successfully.

8. Click **Done**.

   You return to the Record Filter Rules window and the modified rules are displayed.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.23 Removing Record Filters

Use the steps below to remove record filters in Oracle Advanced Outbound.

Prerequisite:

In order to remove record filters, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. On the Recycling Algorithms window, click the **Record Filter** subtab.

   The Record Filters window appears, displaying a list of the existing record filters.

4. In the Remove column, click the checkbox for the record filter you want to remove.

5. Click **Update**.

   The selected record filter is removed.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.24 Creating Validation Rules

Validation rules allow you to make exceptions to the automatic list validation process. For example, you can use validation rules when you don't know the country code or timezone, but you know you will be dialing calls in a certain timezone. If the country code or timezone is not known these records will fail the list validation process and will not be dialed. You can set a validation rule to allow you to dial these records because you are confident of what is in the list. By doing this, you can prevent these calls from failing the list validation process, and thereby not being dialed.

Validation rules are composed of actions. The order of these actions is very important. Advanced Outbound reads the actions from top to bottom. When the first action fails, the rest of the actions under it are ignored. Therefore, you should put the most generic actions at the top. This strategy will conserve processing time.

Validation Rule Example:

Phone Country Code is 1

Timezone is America/New_York

In the above example, country code is placed first. The country code rule is the more generic of the two, therefore it is first. If the record fails the country code rule, it will certainly fail the TimeZone rule.

Use the steps below to create validation rules in Oracle Advanced Outbound.

Prerequisite:

In order to create validation rules, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. Click the **Validation** subtab.

   The Validation Rules window appears, displaying a summary view table of all existing validation rules.

4. Click **Create**.

   The Create Validation Rule window appears.

5. On the Create Validation Rule window, type a name for the validation rule in the Rule Name field and click **Create**.

   Note: Rule names have a 64 character limit and only the following characters are supported:

   - A-Z
   - 0-9
   - underscore, space, and hyphen

   The Validation Rule Details window appears.

6. On the Validation Rule Details window, click **Insert Action**.

   The Edit Validation Rule Actions window appears, displaying a summary view table of all existing validation actions.

   Note: If this is a new validation rule, the summary view will not contain any actions.

7. From the drop-down list in the action column, select the action you want to use for your validation rule, and click **Update**.

   Note: Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the drop-down list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

The selected action is added and the summary view table updates to show the new action.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.25 Modifying Validation Rules

Use the steps below to modify validation rules in Oracle Advanced Outbound.

Prerequisite:

In order to modify validation rules, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. Click the **Validation** subtab.

   The Validation Rules window appears, displaying a summary view table of all existing validation rules.

4. From the Name column, click the validation rule name for the validation rule you want to modify.

   The Validation Rule Details window appears, displaying all existing validation rule actions under the selected validation rule.

5. Modify the validation rules and rule actions.

a. To modify the order of the actions (if there is more than one action): click the blue sort arrow that appears in front of the action text you wish to move. Clicking the arrow will move that action up or down one place (depending on which way the arrow is facing).

b. To edit the properties of a validation rule action: on the Validation Rule Details window, click **Edit**. When the Edit Validation Rule Actions window appears, from the drop-down list(s) in the action column, you can make other selections, and click **Update**.

c. To add additional actions to the validation rule: click **Edit**. When the Edit Validation Rule Actions window appears, from the drop-down list below the last existing action in the action column, select the action you want to use for your validation rule, and click **Update**.

Note: Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the drop-down list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

The Edit Validation Rule Actions window updates to display the modified list of actions.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.26 Removing Validation Rules

Use the steps below to remove validation rules in Oracle Advanced Outbound.

Prerequisite:

In order to remove validation rules, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Algorithms** tab.

   The Algorithms tabpage appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm window is the default view for the algorithms tabpage.

3. Click the **Validation** subtab.

   The Validation Rules window appears, displaying a summary view table of all existing validation rules.

4. From the Name column, click the validation rule name for the validation rule you want to modify.

   The Validation Rule Details window appears, displaying all existing validation rule actions under the selected validation rule.

5. Click **Edit**.

   The Edit Validation Rule Actions window appears, displaying a summary view table for all existing validation rule actions under the selected validation rule.

6. From the Remove column of the summary view table, click the checkbox for the action you want to remove.

7. Click **Update**.

   The Edit Validation Rule Actions window updates and the selected action is removed from the list.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.27 Creating Country Calendars

Country calendars consist of a baseline callable time range for all seven days of the week. Country calendars are expected to be created based on country-specific laws

and are required for Advanced Outbound. Every list entry has one to many contact points. Every contact point (telephone number) must have an associated country code and time zone. Every country code must have an associated calendar. This association creates the base set of callable times for every list entry. Advanced Outbound ships with country calendars for many countries; however, additional country calendars can be created and added to the base product as necessary to meet your business needs.

Unlike user defined calendars, you cannot delete or remove country calendars. You can only create and modify country calendars.

Use the steps below to create country calendars in Oracle Advanced Outbound.

Prerequisite:

In order to create country calendars, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Calling Calendars** tab.

   The calling calendars tabpage appears, displaying a list of all existing country calendars. The Country Calendars window is the default view for the calling calendars tabpage.

3. On the Country Calendars window, click **Create Calendar**.

   The Create Country Calendar window appears.

4. In the Calendar Name field on the Create Country Calendar window, type a name for the new country calendar.

   Note: Calendar names have a 64 character limit and only the following characters are supported:

   - A-Z
   - 0-9
   - underscore, space, and hyphen

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5. From the drop-down list in the Country Name field, select the country you want to associate with the new country calendar.
6. You can create a country calendar by two different methods: you can copy and existing country calendar, or you can create a completely new country calendar. Click the appropriate radio button to select the method by which you will create the country calendar.
    a. To create a country calendar by using an existing country calendar as a model, click the **Copy Country Calendar** radio button and select the country you want to use from the drop-down list in the field next to the radio button.
    b. To create a completely new country calendar, click the **Create New Calendar** radio button.
7. Click **Create**.

    The Country Calendar Details window appears.
8. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

    The Calendar Region Details window appears.

    Note: To open to the Calendar Region Details window, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details window. Also, by clicking the hyperlinked name of day, you can set the whole day for a single value, then copy this to any other day of the week.
9. From the drop-down list in the Region Type field, select **Callable** if you want to add callable hours, select **Not callable** if you want to add non-callable hours, or click **Not specified** if you want to add regions that are not designated as callable or noncallable.
10. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the country calendar to begin taking effect, click the drop-down arrows in each field and select the hour and minute from the respective lists.

Note: All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

11. In the End Time Hour and Minute fields, click the drop-down arrows in each field and select the hour and minute from the respective lists. The end time is the time at which your country calendar will terminate calling.
12. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

Note: Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

13. Click **Apply**.

    The country calendar is created and you return to the Country Calendar Details window.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.28 Modifying Country Calendars

Use the steps below to modify country calendars in Oracle Advanced Outbound.

Prerequisite:

In order to modify country calendars, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Calling Calendars** tab.

   The calling calendars tabpage appears, displaying a list of all existing country calendars. The Country Calendars window is the default view for the calling calendars tabpage.

3. From the Calendar Name column, click the calendar name of the country calendar you want to modify.

   The Country Calendar Details window appears, displaying the calendar.

4. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details window appears.

   Note: To get to the Calendar Region Details window, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details window.

5. From the drop-down list in the Region Type field, select **Callable**.

6. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want to begin calling, click the drop-down arrows in each field and select the hour and minute from the respective lists.

   Note: All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

7. In the End Time Hour and Minute fields, click the drop-down arrows in each field and select the hour and minute from the respective lists.

8. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

9. Click **Apply**.

   The country calendar is created and you return to the Country Calendar Details window.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.29 Creating Holidays or Exceptions for Country Calendars

Use the steps below to create holidays or exceptions for country calendars in Oracle Advanced Outbound.

Prerequisite:

In order to create holidays or exceptions for country calendars, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Calling Calendars** tab.

   The calling calendars tabpage appears, displaying a list of all existing country calendars. The Country Calendars window is the default view for the calling calendars tabpage.

3. From the Calendar Name column, click the calendar name of the country calendar to which you want to add a holiday or exception.

   The Country Calendar Details window appears, displaying the calendar.

4. From the side navigation menu on the Country Calendar Details window, click **Exception List**.

   The Holidays and Exceptions window appears, displaying a list of all existing holidays and exceptions for the selected country calendar.

5. In the Holidays and Exceptions window, click **Create Exception**.

   The Holiday and Exception Details window appears.

6. In the Exception Name field of the Holiday and Exception Details window, type a name for the holiday or exception you are creating.

7. In the Exception Type you can specify when you want the exception to occur. You can set an exception to happen on a given date each year, on a given date once ever, or on a regularly occurring interval (example - first Monday in January).

   c. To set the exception to occur on a specified date each year, click the top radio button, select the month from the drop-down list of months, and select the day from the drop-down list of days.

   d. To set the exception to occur on a specified date once ever, click the middle radio button, select a month from the drop-down list of months, select a day from the drop-down list of days, and type a year in the final field.

   e. To set the exception to happen at a regularly occurring interval, click the bottom radio button, select the interval time from the drop-down list in the first field, select the day of the week from the drop-down list in the middle field, and select the month from the drop-down list in the last field.

8. Click **Create**.

   The exception is created and you return to the Holiday and Exception Details window.

Note: The Holiday and Exception Details window now displays an Exception Region area. You can use this area to define certain hours during the established calling calendar day you want the exception to override. The default is to override the entire day

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9. If you only want the exception to override certain hours during the calling day, in the Exception Region area you can click the time region corresponding to the start time you want to set for the exception.

   The Calendar Region Details window appears.

10. From the drop-down list in the Region Type field, select **Not Callable**.

11. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the exception to begin overriding the calendar, click the drop-down arrows in each field and select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

> **Note:** To open the Calendar Region Details window, you can click any time region in the Exception Region area; however, by clicking the time you want the exception to begin overriding the calendar, you automatically populate the start time fields in the Calendar Region Details window.

12. In the End Time Hour and Minute fields, click the drop-down arrows in each field and from the respective lists, select the hour and minute you want the exception to stop overriding the calendar.

13. Click **Apply**.

    You return to the Holiday and Exception Details window and a confirmation note will appear at the top of the window.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.30 Creating User Defined Calendars

Use the steps below to create user defined calendars in Oracle Advanced Outbound.

Prerequisite:

In order to create user defined calendars, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Calling Calendars** tab.

   The calling calendars tabpage appears, displaying a list of all existing country calendars. The Country Calendars window is the default view for the calling calendars tabpage.

3. On the Country Calendars window, click the **User Defined Calendars** subtab.

   The User Defined Calendars window appears, displaying a list of all existing user defined calendars.

4. On the User Defined Calendars window, click **Create Calendar**.

   The Create User Defined Calendar window appears.

5. On the Create User Defined Calendar window, type a name for the new user defined calendar.

6. You can create a user defined calendar by three different methods: you can copy and existing country calendar, you can copy and existing user defined calendar, or you can create a completely new user defined calendar. Click the appropriate radio button to select the method by which you will create the user defined calendar.

   a. To create a user defined calendar by using an existing country calendar as a model, click the **Copy Country Calendar** radio button and select the country you want to use from the drop-down list in the field next to the radio button.

   b. To create a user defined calendar by using an existing user defined calendar, click the **Copy User Defined Calendar** radio button and select

which existing user defined calendar you want to use from the drop-down list in the field next to the radio button.

c. To create a completely new user defined calendar, click the **Create New Calendar** radio button.

7. Click **Create**.

   The User Defined Calendar Details window appears.

8. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details window appears.

   Note: To open to the Calendar Region Details window, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details window.

9. From the drop-down list in the Region Type field, select **Callable** if you want to add callable hours to the default country calendar, select **Not callable** if you want to override a callable region on the country calendar, or click **Not specified** if you do not want to change the particular callable region on the country calendar.

10. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the user defined calendar to begin taking effect, click the drop-down arrows in each field and select the hour and minute from the respective lists.

    Note: All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

11. In the End Time Hour and Minute fields, click the drop-down arrows in each field and select the hour and minute from the respective lists. The end time is the time at which your user defined calendar will terminate and the default callable regions on the country calendar will resume.

12. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

13. Click **Apply**.

    The user defined calendar is created and you return to the User Defined Calendar Details window.

14. In the Override Country Calendar field on the User Defined Calendar Details window, select **Yes**, or **No** from the drop-down list.

> **Note:** You must select **Yes** to execute the user defined calendar. If you select **No**, the user defined calendar will still be created, but it will not alter or expand upon the calling hours of the existing country calendar.

15. Click **Update**.

    The Update User Defined Calendar Conformation window appears, warning you that overriding the country calendar will cause all users of this calendar to ignore any country specific restrictions.

16. Click **Apply** to override the country calendar with the user defined calendar.

    The user defined calendar is created and you return to the User Defined Calendar Details window.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.31 Modifying User Defined Calendars

Use the steps below to modify user defined calendars in Oracle Advanced Outbound.

Prerequisite:

In order to modify user defined calendars, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Calling Calendars** tab.

   The calling calendars tabpage appears, displaying a list of all existing country calendars. The Country Calendars window is the default view for the calling calendars tabpage.

3. On the Country Calendars window, click the **User Defined Calendars** subtab.

   The User Defined Calendars window appears, displaying a list of all existing user defined calendars.

4. From the list of user defined calendars, click the calendar name for the user defined calendar you want to modify.

   The User Defined Calendar Details window appears.

5. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details window appears.

> **Note:** To get to the Calendar Region Details window, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details window.

6. From the drop-down list in the Region Type field, select **Callable** if you want to add callable hours to the default country calendar, select **Not callable** if you want to override a callable region on the country calendar, or click **Not specified** if you do not want to change the particular callable region on the country calendar.
7. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the user defined calendar to begin taking effect, click the drop-down arrows in each field and select the hour and minute from the respective lists.

   Note: All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

8. In the End Time Hour and Minute fields, click the drop-down arrows in each field and select the hour and minute from the respective lists. The end time is the time at which your user defined calendar will terminate and the default callable regions on the country calendar will resume.
9. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

   Note: Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

10. Click **Apply**.

    The country calendar is created and you return to the Country Calendar Details window.
11. In the Override Country Calendar on the User Defined Calendar Details window, select **Yes**, or **No** from the drop-down list.

Note: You must select **Yes** to execute the user defined calendar. If you select **No**, the user defined calendar will still be created, but it will not alter or expand upon the calling hours of the existing country calendar.

12. Click **Update**.

    The Update User Defined Calendar Conformation window appears, warning you that overriding the country calendar will cause all users of this calendar to ignore any country specific restrictions.

13. Click **Apply** to override the country calendar with the user defined calendar.

    The user defined calendar is created and you return to the User Defined Calendar Details window. A confirmation note will appear at the top of the window, letting you know the modification was successful.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.32 Creating Holidays or Exceptions for User Defined Calendars

Use the steps below to create holidays or exceptions for user defined calendars in Oracle Advanced Outbound.

Prerequisite:

In order to create holidays or exceptions for user defined calendars, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Calling Calendars** tab.

The calling calendars tabpage appears, displaying a list of all existing country calendars. The Country Calendars window is the default view for the calling calendars tabpage.

3. On the Country Calendars window, click the **User Defined Calendars** subtab.

   The User Defined Calendars window appears, displaying a summary view table of all existing user defined calendars.

4. From the Calendar Name column, click the calendar name of the user defined calendar to which you want to add a holiday or exception.

   The User Defined Calendar Details window appears, displaying the calendar.

5. From the side navigation menu on the User Defined Calendar Details window, click **Exception List**.

   The Holidays and Exceptions window appears, displaying a list of all existing holidays and exceptions for the selected user defined calendar.

6. In the Holidays and Exceptions window, click **Create Exception**.

   The Holiday and Exception Details window appears.

7. In the Exception Name field of the Holiday and Exception Details window, type a name for the holiday or exception you are creating.

8. In the Exception Type you can specify when you want the exception to occur. You can set an exception to happen on a given date each year, on a given date once ever, or on a regularly occurring interval (example - first Monday in January).

   d. To set the exception to occur on a specified date each year, click the top radio button, select the month from the drop-down list of months, and select the day from the drop-down list of days.

   e. To set the exception to occur on a specified date once ever, click the middle radio button, select a month from the drop-down list of months, select a day from the drop-down list of days, and type a year in the final field.

   f. To set the exception to happen at a regularly occurring interval, click the bottom radio button, select the interval time from the drop-down list in the first field, select the day of the week from the drop-down list in the middle field, and select the month from the drop-down list in the last field.

9. Click **Create**.

   The exception is created and you return to the Holiday and Exception Details window.

Note: The Holiday and Exception Details window now displays an Exception Region area. You can use this area to define certain hours during the established calling calendar day you want the exception to override. The default is to override the entire day

10. If you only want the exception to override certain hours during the calling day, in the Exception Region area you can click the time region corresponding to the start time you want to set for the exception.

    The Calendar Region Details window appears.

11. From the drop-down list in the Region Type field, select **Not Callable**.

12. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the exception to begin overriding the calendar, click the drop-down arrows in each field and select the hour and minute from the respective lists.

    Note: All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

    Note: To open the Calendar Region Details window, you can click any time region in the Exception Region area; however, by clicking the time you want the exception to begin overriding the calendar, you automatically populate the start time fields in the Calendar Region Details window.

13. In the End Time Hour and Minute fields, click the drop-down arrows in each field and from the respective lists, select the hour and minute you want the exception to stop overriding the calendar.

14. Click **Apply**.

    You return to the Holiday and Exception Details window and a confirmation note will appear at the top of the window.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.33 Removing User Defined Calendars

Use the steps below to remove user defined calendars in Oracle Advanced Outbound.

Prerequisite:

In order to remove user defined calendars, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Calling Calendars** tab.

   The calling calendars tabpage appears, displaying a list of all existing country calendars. The Country Calendars window is the default view for the calling calendars tabpage.

3. On the Country Calendars window, click the **User Defined Calendars** subtab.

   The User Defined Calendars window appears, displaying a list of all existing user defined calendars.

4. In the Remove column, click the checkbox for the user defined calendar you want to remove.

5. Click **Update**.

   The selected user defined calendar is removed.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.34 Creating Voice Detection Units

What you are doing in the following steps is configuring the VDU to be used by Advanced Outbound. During this configuration process, you will need to provide information in three main areas:

- VDU information
- Board information
- Port information

Use the steps below to create voice detection units in Oracle Advanced Outbound.

Prerequisite:

In order to create voice detection units, you must have Advanced Outbound administrator level rights. The VDU board must already be installed on the machine. You must contact your PBX administrator for the VDU board port extension numbers.

> **Note:** The VDU values that appear in the drop-down fields are pre-seeded in Advanced Outbound. The server group information is entered by using Oracle Interaction Center Server Manager (ICSM). For more information on ICSM, please refer to the Oracle ICSM documentation.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Telephony** tab.

   The Telephony tabpage appears, displaying a summary view table of all existing VDUs. The Voice Detection Unit subtab window is the default view for the Telephony tabpage.

3. On the Voice Detection Unit window, click **Create VDU**.

   The Voice Detection Unit - Create window appears.

4. In the VDU Name field on the Voice Detection Unit -- Create window, type a name for the VDU.

Note: VDU names have a 64 character limit and only the following characters are supported:

- A-Z
- 0-9
- underscore, space, and hyphen

5. From the drop-down list in the VDU Board Name field, select the type of VDU board installed in your call center server group.

   Note: The VDU board name is the manufacturers name for the particular VDU board. Only VDU board names that are supported by Oracle Advanced Outbound will appear in the drop down list.

   The Port Type and Number of Ports fields will automatically update to reflect the correct information for the selected VDU Card.

6. From the drop-down list in the Server Group field, select the name of the server group where your VDU card is installed.

   The Middleware and Dial Server fields automatically update to reflect the correct information for the selected server group.

7. Click **Next**.

   The Voice Detection Unit -- Board Information window appears, displaying the VDU name and VDU board name you supplied on the previous window.

8. From the drop-down list in the ROTARY SETTING field, select the rotary setting you want your VDU board to use.

   Note: Each Dialogic VDU board has a rotary switch that allows you to determine that board order when you have more than one board in one machine. Dialogic supports up to 4 boards (rotary switch numbers 0-3) in one machine. Oracle Advanced Outbound require the rotary switch for the first board be set to 0, the rotary switch for the second board must be set to 1, etc. The rotary switch can be set either on the actual hardware board, or in this utility, which sets the rotary switch in the database.

9. Click **Next**.

   The Voice Detection Unit Port Information window appears, displaying a summary view table for all the existing ports on the selected VDU board.

10. From the Voice Detection Unit Port Information window, click **Auto Parameters**.

    The Voice Detection Unit -- Auto Generate Parameters window appears.

    Note: Steps 11-14 must be performed in the top set of fields on the Voice Detection Unit -- Auto Generate Parameters summary view table. Leaving the top set of fields blank will produce an error.

11. From the drop-down list in the Starting Port column of the summary view table, select the port number from which you want the auto-parameters utility to begin assigning extension numbers.

12. From the drop-down list in the Ending Port column of the summary view table, select the port number at which you want the auto-parameters utility to stop assigning extension numbers.

    Note: Your PBX Administrator assigns the port extensions for each VDU board. You must contact the PBX Administrator to obtain these extensions. The port extensions will typically be in a set sequential order (growing by one or more in value per port extension).

13. From the list in the Starting Value column of the summary view table, type the number your PBX Administrator assigned to the first port on your VDU board.

14. From the list in the Increase By column of the summary view table, type the value by which each port extension number increases.

    Note: This number is typically one or two, but can be any sequence your PBX Administrator assigns.

15. Click **Apply**.

You return to the Voice Detection Unit Port Information window and the summary view table updates to display the port extensions you determined.

16. From the drop-down list in the status column for each port you want to be active, select **Active**.

> **Note:** **Active** should be the default setting for the port status. If you want to change the port status for a particular port to inactive, select **Inactive** from the drop-down list for that port in the status column.

17. Click **Create VDU**.

    The Voice Detection Unit window appears, displaying a confirmation message that states your new VDU has been created and saved.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.35 Modifying Voice Detection Units

Use the steps below to modify voice detection units in Oracle Advanced Outbound.

Prerequisite:

In order to modify voice detection units, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Telephony** tab.

The Telephony tabpage appears, displaying a summary view table of all existing VDUs. The Voice Detection Unit subtab window is the default view for the Telephony tabpage.

3. You can change the status of a VDU without going to the Detail window, by selecting **Active** or **Inactive** from the drop-down list in the status column, then clicking **Update**.
4. From the VDU Name column of the summary view table, click the VDU name for the VDU you want to modify.

   The Voice Detection Unit Detail window appears.
5. From the drop-down list in the Rotary Setting field, you can modify the rotary setting for the VDU by selecting a different number.
6. From the drop-down list in the Server Group field, you can change the server group name by selecting a different name.

   The Middleware and Dial Server fields automatically update to reflect the correct information for the selected server group.
7. Click **Update**.

   The modification is saved and you return to the Voice Detection Unit Detail window. A confirmation message appears on the top of the window to let you know the modification was successful.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.36 Removing Voice Detection Units

Use the steps below to remove voice detection units in Oracle Advanced Outbound.

Prerequisite:

In order to remove voice detection units, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Telephony** tab.

   The Telephony tabpage appears, displaying a summary view table of all existing VDUs. The Voice Detection Unit subtab window is the default view for the Telephony tabpage.

3. From the Remove column of the summary view table, click the checkbox for the VDU you want to remove.

4. Click **Update**.

   The selected VDU is removed and the summary view table updates accordingly.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.37 Creating Messages

What you are actually doing in this topic is importing a pre-recorded message and configuring it for use by Advanced Outbound.

Note: Messages must be recorded into a .wav or .vox file using an external utility (these programs come with all modern operating systems). The messages are then imported into the database and associated to campaign schedules using the Advanced Outbound administrative interface.

Use the steps below to create messages in Oracle Advanced Outbound.

Prerequisite:

In order to create messages, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Telephony** tab.

   The Telephony tabpage appears, displaying a summary view table of all existing VDUs. The Voice Detection Unit subtab window is the default view for the Telephony tabpage.

3. On the Voice Detection Unit window, click the **Voice Messages** subtab.

   The Voice Messages window appears, displaying a summary view table of all existing messages.

4. On the Voice Messages window, click **Create**.

   The Voice Messages -- Create window appears.

5. In the Message Name field, type a name for the message.

   Note: Message names have a 64 character limit and only the following characters are supported:

   - A-Z
   - 0-9
   - underscore, space, and hyphen

6. In the description field, type a description on the message.

7. From the drop-down list in the Message Type field, select if the message will be an answering machine message or a front hold message.

8. From the drop-down list in the Format field, select the message format.

Note: Oracle Advanced Outbound supports the following message formats:

- 11Khz, 8Bit wav files
- 8Khz, 8Bit wav files
- 6Khz, 8Bit wav files
- vox files

9. In the File Name field, click **Browse**.

   A browse dialog box opens, allowing you to browse your local drives or the network to find the message file you want.

10. Once you have located the file, select it and click **Open**.

    The selected file name appears in the File Name field.

11. Click **Create**.

    The Voice Messages window appears displaying a confirmation message stating that the message has been created successfully and the new message is displayed in the summary view table.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.38 Modifying Messages

Use the steps below to modify messages in Oracle Advanced Outbound.

Prerequisite:

In order to modify messages, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Telephony** tab.

   The Telephony tabpage appears, displaying a summary view table of all existing VDUs. The Voice Detection Unit subtab window is the default view for the Telephony tabpage.

3. On the Voice Detection Unit window, click the **Voice Messages** subtab.

   The Voice Messages window appears, displaying a summary view table of all existing messages.

4. From the Message Name column of the summary view table, click the message name for the message you want to modify.

   The Voice Messages -- Detail window appears.

5. In the Description field, you can type a new description for the message

6. If you want to replace the message with another one, click the Replace Message checkbox.

   The configuration fields below the Replace Message checkbox activate.

7. From the drop-down list in the Message Type field, select if the message will be an answering machine message or a front hold message.

8. From the drop-down list in the Format field, select the message format.

   Note: Oracle Advanced Outbound supports the following message formats:

   - 11Khz, 8Bit wav files
   - 8Khz, 8Bit wav files
   - 6Khz, 8Bit wav files
   - vox files

   ---

9. In the File Name field, click **Browse**.

   A browse dialog box opens, allowing you to browse your local drives or the network to find the message file you want.

10. Once you have located the file, select it and click **Open**.

The selected file name appears in the File Name field.

11. Click **Update**.

    The Voice Messages -- Detail window displays a confirmation message stating that the changes have been saved.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.39 Removing Messages

Use the steps below to delete messages in Oracle Advanced Outbound.

Prerequisite:

In order to remove messages, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Telephony** tab.

   The Telephony tabpage appears, displaying a summary view table of all existing VDUs. The Voice Detection Unit subtab window is the default view for the Telephony tabpage.

3. On the Voice Detection Unit window, click the **Voice Messages** subtab.

   The Voice Messages window appears, displaying a summary view table of all existing messages.

4. From the Remove column of the summary view table, click the checkbox for the message you want to remove.

5. Click **Update**.

The selected message is removed and the Voice Messages window displays a confirmation message that the change has been saved.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40 Generating Reports

Call centers are dynamic environments; being armed with real-time information is critical in decisions such as managing list depletion/exhaustion and managing the productivity of the call center agents.

Advanced Outbound logs information to two areas: Interaction History and Interaction Center Intelligence.

Information logged into Interaction History contains only dial attempts made by Advanced Outbound that did not result in a call connect, therefore was not forwarded to an agent. The log entries in Interaction History from Advanced Outbound help to build a complete picture of calling efforts. Calls that were completed and transfer to an agent application will have log entries from the agent application. The combination of log entries from both sources will provide a complete view of the calling effort and its results.

Information logged into Interaction Center Intelligence (ICI) is for the purpose of providing some real-time reports on the dialing efforts. Information feed to CCI is done on an interval basis, and reflects up-to-date on the call center performance such as: break down of the types of calls made, break down of call outcomes, limited agent information in terms of number of agents, and break down of records left to be dial.

Advanced Outbound allows you to generate the following reports:

Table 2–1 Oracle Advanced Outbound Report Types and Their Descriptions

Report Name	Report Description
Agent Call Results Detail	Provides call center administrators with a view of the distribution of call results among the agents for a given campaign that is currently active in the call center. Statistical data for the report only incorporates data since the specified beginning time period, where the maximum window is set at 24 hours. Data beyond the maximum period may be obtained through an Interaction Center Intelligence equivalent report.
Agent Performance	Provides call center administrators with a view of the distribution of call results among lists and subsets for a given campaign that is currently active in the call center. Statistical data for the report only incorporates data since the specified beginning time period, where the maximum window is set at 24 hours. Data beyond the maximum period may be obtained through an Interaction Center Intelligence equivalent report.
Campaign Schedule Call Results Detail	Provides call center administrators with a view of the distribution of call results among lists and subsets for a given campaign that is currently active in the call center. Statistical data for the report only incorporates data since the specified beginning time period, where the maximum window is set at 24 hours. Data beyond the maximum period may be obtained through an Interaction Center Intelligence equivalent report.
Campaign Schedule Dialing Statistics	Provides call center administrators with an ability to evaluate the efficiencies of a campaign schedule calling effort. Statistical data for the report only incorporates data since the specified beginning time period, where the maximum window is set at 24 hours. Data beyond the maximum period may be obtained through an Interaction Center Intelligence equivalent report.
Campaign Schedule Outcome Summary	Provides call center administrators with a view of the distribution of call outcomes and results for a given campaign that is currently active in the call center. Statistical data for the report only incorporates data since the specified beginning time period, where the maximum window is set at 24 hours. Data beyond the maximum period may be obtained through an Interaction Center Intelligence equivalent report.
Campaign Schedule Record Detail Statistics	Provides call center administrators with a detailed view of the distribution of records for one active campaign schedule. Statistical data for the report reflects back to when the campaign schedule has become active.

Table 2–1 Oracle Advanced Outbound Report Types and Their Descriptions

Report Name	Report Description
Campaign Schedule Record Summary Statistics	Provides call center administrators with a quick glance view of the distribution of records for all campaigns that are currently active in the call center. Statistical data for the report reflects back to when the campaign schedule has become active.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40.1 Agent Call Results Detail

Use the steps below to generate a Agent Call Results Detail report in Oracle Advanced Outbound.

Prerequisite:

In order to generate reports, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Performance** tab.

   The Performance tabpage appears, displaying the Agent Call Results Detail window. This is the default window for the Performance tab.

3. From the drop-down list in the Selection of a campaign schedule for report generation field, select the campaign schedule for which you want to see agent call results.

4. From the drop-down list in the Selection of beginning time period window for report (no more than 24 hours ago) field, select the time on which you want the report to begin measuring results.

5. Click **Show Report**.

The Agent Call Result Detail window updates to reflect the generated report results.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40.2 Agent Performance

Use the steps below to generate a Agent Performance report in Oracle Advanced Outbound.

Prerequisite:

In order to generate reports, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Performance** tab.

   The Performance tabpage appears, displaying the Agent Call Results Detail window. This is the default window for the Performance tab.

3. From the side navigation bar, click **Agent Performance**.

   The Agent Performance window appears.

4. From the drop-down list in the Selection of a campaign schedule for report generation field, select the campaign schedule for which you want to see agent performance.

5. From the drop-down list in the Selection of beginning time period window for report (no more than 24 hours ago) field, select the time at which you want the report to begin measuring performance.

6. Click **Show Report**.

   The Agent Performance window updates to reflect the generated report results.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40.3 Campaign Schedule Call Results Detail

Use the steps below to generate a campaign schedule call results detail report in Oracle Advanced Outbound.

Prerequisite:

In order to generate reports, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Performance** tab.

   The Performance tabpage appears, displaying the Agent Call Results Detail window. This is the default window for the Performance tab.

3. From the side navigation bar, click **Campaign Schedule Call Results Detail**.

   The Campaign Schedule Call Results Detail window appears.

4. From the drop-down list in the Selection of a campaign schedule for report generation field, select the campaign schedule for which you want to see call results.

5. From the drop-down list in the Selection of beginning time period window for report (no more than 24 hours ago) field, select the time at which you want the report to begin measuring call results.

6. Click **Show Report**.

   The Campaign Schedule Call Results Detail window updates to reflect the generated report results.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40.4 Campaign Schedule Dialing Statistics

Use the steps below to generate a Campaign Schedule Dialing Statistics report in Oracle Advanced Outbound.

Prerequisite:

In order to generate reports, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Performance** tab.

   The Performance tabpage appears, displaying the Agent Call Results Detail window. This is the default window for the Performance tab.

3. From the side navigation bar, click **Campaign Schedule Dialing Statistics**.

   The Campaign Schedule Dialing Statistics window appears.

4. From the drop-down list in the Selection of a campaign schedule for report generation field, select the campaign schedule for which you want to see dialing statistics.

5. From the drop-down list in the Selection of beginning time period window for report (no more than 24 hours ago) field, select the time on which you want the report to begin measuring dialing statistics.

6. Click **Show Report**.

   The Campaign Schedule Dialing Statistics window updates to reflect the generated report results.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40.5 Campaign Schedule Outcome Summary

Use the steps below to generate a Campaign Schedule Outcome Summary report in Oracle Advanced Outbound.

Prerequisite:

In order to generate reports, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Performance** tab.

   The Performance tabpage appears, displaying the Agent Call Results Detail window. This is the default window for the Performance tab.

3. From the side navigation bar, click **Campaign Schedule Outcome Summary**.

   The Campaign Schedule Outcome Summary window appears.

4. From the drop-down list in the Selection of a campaign schedule for report generation field, select the campaign schedule for which you want to see outcome summary results.

5. From the drop-down list in the Selection of beginning time period window for report (no more than 24 hours ago) field, select the time on which you want the report to begin measuring outcome summary results.

6. Click **Show Report**.

   The Campaign Schedule Outcome Summary window updates to reflect the generated report results.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40.6 Campaign Schedule Record Detail Statistics

Use the steps below to generate a Campaign Schedule Record Detail Statistics report in Oracle Advanced Outbound.

Prerequisite:

In order to generate reports, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Performance** tab.

   The Performance tabpage appears, displaying the Agent Call Results Detail window. This is the default window for the Performance tab.

3. From the side navigation bar, click **Campaign Schedule Record Detail Statistics**.

   The Campaign Schedule Record Detail Statistics window appears.

4. From the drop-down list in the Selection of a campaign schedule for report generation field, select the campaign schedule for which you want to see record detail statistics.

5. Click **Show Report**.

   The Campaign Schedule Record Detail Statistics window updates to reflect the generated report results.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.40.7 Campaign Schedule Record Summary Statistics

Use the steps below to generate a Campaign Schedule Record Summary Statistics report in Oracle Advanced Outbound.

Prerequisite:

In order to generate reports, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tabpage, click the **Performance** tab.

   The Performance tabpage appears, displaying the Agent Call Results Detail window. This is the default window for the Performance tab.

3. From the side navigation bar, click **Campaign Schedule Record Summary Statistics**.

   The Campaign Schedule Record Summary Statistics window appears.

4. In the Filter by call center field, type the name of the call center on which you want to generate record summary statistics.

5. Click **Show Report**.

   The Campaign Schedule Record Summary Statistics window updates to reflect the generated report results.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.41 Configuring Server Properties

The Server Properties allows you to define the server timezone. This is the timezone where the database is located.

Use the steps below to configure the server properties in Advanced Outbound.

Prerequisites:

In order to configure server properties, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tab, click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab window. This is the default window for the Administration tab.

3. In the Server timezone field on the Server Properties window, click the flashlight icon.

   The Select a Time Zone window appears, displaying a summary view table of all existing time zones.

4. From the Select a Time Zone window, select the timezone you want to assign to your server by clicking the timezone name from the Time Zone column of the summary view table.

   You return to the Server Properties window. The selected timezone appears in the Server timezone field.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.42 Creating Area Code Mappings

An area code is defined as a 3-digit number that identifies each telephone service area in a country (such as the U.S. or Canada).

Area Code Mapping provides a way for Advanced Outbound to find the country to associate a phone number with.

Use the steps below to create an area code mapping in Advanced Outbound.

Prerequisites:

In order to create area code mappings, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tab, click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab window. This is the default window for the Administration tab.

3. From the Server Properties window, click the **Time Zone Mappings** subtab.

   The Area Code Mapping Detail window appears, displaying a summary view table of all existing area code mappings.

4. On the Area Code Mapping Detail window, click **Create**.

   The Area Code Mapping -- Create window appears.

5. In the Country Name field, click the flashlight icon.

   The Select a Country Name window appears.

6. From the Select a Country Name window, select a country name from the list.

   You return to the Area Code Mapping window. The selected Country Name appears in the Country Name field, and the Country Code field automatically populates with the pre-seeded country code for the selected country name.

7. In the Area Code field, enter an area code for the selected country.

8. Click **Create**.

The Area Code Mapping window updates to reflect the new area code mapping.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.43 Modifying Area Code Mappings

Use the steps below to modify an area code mapping in Advanced Outbound.

Prerequisites:

In order to modify and area code mapping, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tab, click the Administration tab.

   The Administration tab appears, displaying the Server Properties subtab window. This is the default window for the Administration tab.

3. From the Server Properties window, click the **Time Zone Mappings** subtab.

   The Area Code Mapping Detail window appears, displaying a summary view table of all existing area code mappings.

4. From the Country Name column of the summary view table, click the area code mapping you want to modify.

   The Area Code Mapping -- Details window appears.

5. In the Country Name field, click the flashlight icon.

   The Select a Country Name window appears.

6. From the Select a Country Name window, select new country name from the list.

You return to the Area Code Mapping window. The selected Country Name appears in the Country Name field, and the Country Code field automatically populates with the pre-seeded country code for the selected country name.

7. In the Area Code field, enter an area code for the selected country.
8. Click **Update**.

   The modified area code mapping is saved.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.44 Removing Area Code Mappings

Use the steps below to remove an area code mapping in Advanced Outbound.

Prerequisites:

In order to remove area code mappings, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.
2. On the Campaign Schedules tab, click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab window. This is the default window for the Administration tab.
3. From the Server Properties window, click the **Time Zone Mappings** subtab.

   The Area Code Mapping Detail window appears, displaying a summary view table of all existing area code mappings.
4. In the Remove column of the summary view table, click the checkbox for the area code mapping you want to remove.
5. Click **Update**.

The selected area code mapping is removed from the summary view table.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.45 Creating Time Zone Mappings

Advanced Outbound contains time zone mapping tables that must be defined. Many countries only occupy a single time zone, but others are spread across multiple time zones. If your interaction center plans to make calls throughout countries (for example: United States or Canada) where many states and provinces fall in different time zones, you may need to provide the state/region postal codes and area codes to determine that Advanced Outbound is using the correct time zone for the customer. There are standard database load utilities readily available within the database that can be used to upload purchased data into the Advanced Outbound Schema.

In order to ensure that customers are called at the appropriate times, Advanced Outbound must know where the person resides in relation to time zones. This way Advanced Outbound can follow the appropriate telemarketing laws that govern calling in their particular country, state, country or city.

The time zone mapping form is used as an easy entry point to provide Advanced Outbound with a method to call customers or contacts.

At a minimum, the country code and time zone must be entered for each country that an interaction center will contact. It is mandatory that all countries map their time zone with their country name.

For single time zone countries, no further information is needed.

For countries with more than one time zone, it is recommended that you map the appropriate time zone, country code, and optional area code, postal code, state/region information to assist Advanced Outbound during list validation time. By utilizing the address specific information, Advanced Outbound can match a customer record with the appropriate time zone and country if their customer record is incomplete.

This functionality is especially important in countries where there are multiple time zones. For example, the United States has eight time zones spanning from Saipan, Northern Mariana Islands, U.S.A. (Standard time zone: UTC/GMT +10 hours

where daylight saving time currently not observed) and Honolulu, Hawaii, U.S.A. (Standard time zone: UTC/GMT -10 hours where daylight saving time currently not observed). In addition, there are many states who have either multiple time zones and may or may not participate in daylight savings time.

For example: the state of Indiana has up to three different time zones depending on the location in the state. In order to ensure we call the customer at the correct time, we need to know exactly where the customer is and follow the laws for their state. In this case, Advanced Outbound may need to go down to the postal code to ensure that the correct time zone is being used for the customer record.

Use the steps below to create a time zone mapping in Advanced Outbound.

Prerequisites:

In order to create time zone mappings, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tab, click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab window. This is the default window for the Administration tab.

3. From the Server Properties window, click the **Time Zone Mappings** subtab.

   The Area Code Mapping Detail window appears, displaying a summary view table of all existing area code mappings.

4. From the side navigation bar, click **Time Zone Mapping**.

   The Time Zone Mapping window appears, displaying a summary view table of all existing time zone mappings.

5. On the Time Zone Mapping window, click **Create**.

   The Time Zone Mapping -- Create window appears.

6. In the Country Name field, click the flashlight icon.

   The Select a Country Name window appears.

From the list of country names, select the country name to which you want to map a time zone.

7. From the drop-down list in the Area Code field, select an area code for the country name you selected in the previous step.
8. In the Postal Code field, type a postal code for the area code you selected in the previous step.
9. In the State/Region Field, type the appropriate state/region for the area code.

> **Note:** The format for the state/region should be the entire state/region name with initial capitalization (for example, Nevada).

10. In the Time Zone field, click the flashlight icon.

    The Select a Time Zone window appears, displaying a summary view table of all existing time zones.
11. From the Time Zone column of the summary view table, select the time zone to which you want to map the country code you selected.
12. Click **Create**.

    The mapping between the selected country code and time zone is created.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.46 Modifying Timezone Mappings

Use the steps below to modify a time zone mapping in Advanced Outbound.

Prerequisites:

In order to modify time zone mappings, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tab, click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab window. This is the default window for the Administration tab.

3. From the Server Properties window, click the **Time Zone Mappings** subtab.

   The Area Code Mapping Detail window appears, displaying a summary view table of all existing area code mappings.

4. From the side navigation bar, click **Time Zone Mapping**.

   The Time Zone Mapping window appears, displaying a summary view table of all existing time zone mappings.

5. From the Country Name column of the summary view table, click the country name for the time zone mapping you want to modify.

   The Time Zone Mapping -- Details window appears.

6. Modify the time zone mapping as needed.

   a. To change the country name to which the timezone is mapped: In the Country Name field, click the flashlight icon. When the Select a Country Name window appears, select the country name to which you want to map the time zone from the list of country names.

   b. To change the area code: From the drop-down list in the Area Code field, select an area code for the country name you selected in the previous step.

   c. To change the postal code: In the Postal Code field, type a postal code for the area code you selected in the previous step.

   d. To change the state/region: In the State/Region Field, type the appropriate state/region for the area code selected in step b.

   Note: The format for the state/region should be the entire state/region name with initial capitalization (for example, Nevada).

e. To change the time zone: In the Time Zone field, click the flashlight icon. when the Select a Time Zone window appears, select the time zone to which you want to map the country code you selected.

7. Click **Update**.

   The modified mapping between the selected country code and time zone is saved.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

2.0.47 Removing Timezone Mappings

Use the steps below to remove a time zone mapping from Advanced Outbound.

Prerequisites:

In order to remove time zone mappings, you must have Advanced Outbound administrator level rights.

Steps:

1. On the Administrator UI login screen, type your admin level User ID and Password in the provided fields and click **Go**.

   The Advanced Outbound Administration UI appears, displaying the Campaign Schedules tabpage.

2. On the Campaign Schedules tab, click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab window. This is the default window for the Administration tab.

3. From the Server Properties window, click the **Time Zone Mappings** subtab.

   The Area Code Mapping Detail window appears, displaying a summary view table of all existing area code mappings.

4. From the side navigation bar, click **Time Zone Mapping**.

   The Time Zone Mapping window appears, displaying a summary view table of all existing time zone mappings.

5. From the Remove column of the summary view table, click the checkbox for the time zone mapping you want to remove.
6. Click Update.

The selected time zone mapping is removed.

See Also:

Understanding Oracle Advanced Outbound

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Other Administering Tasks

3

Other Administering Tasks

This topic group covers the following topics:

3.0.1 Understanding Responsibilities

The ability to perform tasks in the forms application depends on the responsibility you select.

A responsibility is a level of authority in Oracle Applications that lets you access only those Oracle Applications functions and data appropriate to fulfill your role in an organization. In essence, a responsibility is a map that identifies a resource (user) and provides that resource with an association to specified functionality.

Each responsibility allows access to:

- A specific Oracle application or group of Oracle applications.
- A set of books, such as U.S. Operations or German Sales or an organization, such as New York Manufacturing or New York Distribution.

- A restricted list of windows that you can navigate to; for example, a responsibility may allow certain Oracle Planning users to enter forecast items, but not enter master demand schedule items.
- A restricted list of functions you can perform. For example, two responsibilities may have access to the same window, but one responsibility's window may have additional function buttons that the other responsibility's window does not have.
- Reports in a specific application; your system administrator can assign groups of reports to one or more responsibilities, so the responsibility you choose determines the reports you can submit.

Each user has at least one responsibility and several users can share the same responsibility.

The following responsibilities are utilized to administer Oracle Advanced Outbound from the forms application:

Universal Work Queue Administrator: The UWQ Administrator responsibility enables the user to access the UWQ functions used for UWQ system administration. In the current release of the UWQ, the UWQ system administration functionality is used only for UWQ implementations involving processing of media work items.

Call Center Administrator: The Call Center Administrator responsibility enables the user to access the Oracle Telephony Manager functions used for administration of Advanced Inbound, including the forms for the Routing Administrator responsibility, which enables the user to access the routing functions used for routing administration, such as defining classification rules and routing priorities.

TeleSales Administrator: The TeleSales Administrator responsibilities enable access to all TeleSales Administrative forms, including campaign assignment, call wrap-up administration, and campaign outcome assignment.

Agent: The agent user is assigned responsibilities that enable access to all of the Oracle Applications needed by the agent. The Agent responsibility is assigned to a user whose job is to process work items using the functionality provided by the TeleSales applications to the UWQ Agent GUI. For example, in a telephony call center, if an agent is assigned the responsibility of TeleSales Agent, the agent can process work items, such as inbound calls, outbound calls, and so on using the functions and screens provided by the Advanced Inbound and Advanced Outbound applications to the UWQ Agent GUI.

Note: Advanced Inbound ships with a Call Center Administrator responsibility that includes the UWQ, Call Center, and Routing Administrator responsibilities.

See Also:

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Other Administering Tasks

3.0.2 Creating Advanced Outbound User Accounts

The process of creating user accounts for Advanced Outbound consists of the following tasks:

1. Create an employee.
2. Create a CRM user:
   - Link the employee and user.
   - Assign a responsibility.
3. Set UWQ user profile options.
4. Define the user as a resource.
5. Assign outbound campaigns to TeleSales agents or assign TeleSales agents to campaigns.

Depending on your preferences for setting up users, you may not need to perform all of the steps for all users; see the note that follows.

Note: If employees are already defined for your business in HRMS, they need not be created.

Only a user with the System Administrator responsibility can perform the task of creating users.

If you are creating a user who will only use a UWQ, OTM, or Routing Administrator responsibility (such as a Call Center Administrator user), when logged on to the particular user account, you do not need to set UWQ profile options for the user or to define the user as a resource.

You can use the SYSADMIN user login, or another login account with access to the appropriate responsibilities, when setting up AO user accounts.

The following responsibilities are assigned to the SYSADMIN user and are used in setting up the AO users:

- **HRMS Manager (U.S. HRMS responsibility: US HR Manager):** This responsibility is used to create an employee in HRMS.
- **System Administrator:** This responsibility is used to create a CRM user.
- **CRM Resource Manager:** This responsibility is used to define users as a CRM resource.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

3.0.3 Creating an Employee

A user must be a member of your business and therefore must either exist in your human resources management system (HRMS) or be created there.

This information must be entered in an Oracle8*i* application, specifically Oracle HRMS or Oracle CRM Resource Manager.

If Oracle HRMS has been purchased and licensed by your business, each Advanced Outbound user *must* be defined here first. If HRMS has *not* been purchased, an employee must be set up using CRM Resource Manager, including, at minimum, all

information established as a required field. Creating an employee through CRM Resource Manager populates the same Oracle Forms used by the full HRMS application.

> **Note:** The system will not allow creation of employees using CRM Resource Manager if HRMS is in use at your business. Additional administration, including designation of additional fields as required, is established through the Forms-based application. HRMS therefore offers the most flexibility in this area.

Use the steps below to create an employee with Oracle HRMS.

Prerequisites:

In order to create employees, you must be assigned HRMS Manager level rights.

Steps:

1. Log in to Oracle Applications (the Forms-based application).

   A list of responsibilities appears.

2. From the list of responsibilities, select the **HRMS Manager** responsibility, and click **OK**.

   The Navigator - HRMS Manager window appears.

3. From the Navigator - HRMS Manager window, double-click **People**.

   The People node expands.

4. Under the People node, select **Enter and Maintain** and click **Open**.

   The Enter and Maintain window appears.

5. On the Enter and Maintain window, type the person's name in the Name field.

   > **Note:** Only the last name is required.

6. In the U.S., you must select the gender, Male, Female, or Unknown Gender, from the list of values. In the U.K., if you enter an employee, you must enter the gender.

7. In the Type field, select **Employee** as the person type.

> **Note:** For detailed information about the required fields for creating an employee, see *Managing People Using Oracle HRMS, Release 11i*.

8. If your business uses manual number entry, use the Employee or Applicant field to enter an employee or applicant number. If your enterprise uses automatic number generation, the employee or applicant number is automatically displayed when you save your entries in this window.

> **Note:** U.S. HRMS ships with the required field of Employee ID for the employee number, and it is automatically generated by the system. This can be changed in HRMS.

9. On the Personal tabpage, enter details for the person, as required.
10. To assign an employee to a payroll, you must enter his or her date of birth.
11. If you are using the U.S. version of HRMS you must enter the social security number. The Social Security Number field is a required field in U.S. HRMS and may not be required for other versions of HRMS.

> **Note:** Fields that are not required in U.S. HRMS may be required in other versions. Additionally, you can set HRMS to change some required fields. Refer to specific HRMS documentation.

12. On the Main Toolbar, click the **Save** icon.

    The new employee is created.

Reference:

For detailed information on creating an employee, see *Managing People Using Oracle HRMS, Release 11i, Chapter 1* - "Employee Management, Special Information Types, Entering a New Person."

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

3.0.4 Creating a CRM User

CRM applications require additional information about users that is not required for the ERP applications. Thus, rather than being included in HRMS, that information is gathered when creating a CRM user in the Forms application.

This step creates a username that will be associated with an employee (already created in the Creating an Employee topic) of your business. When this step is performed, a record is inserted in both the ERP and CRM tables so that the user is available to both. However, the CRM user must be an employee of your business; therefore, the employee must be created before you make the employee a CRM user. For detailed information about creating a CRM user, see *Oracle Applications System Administrator's Guide*.

Use the steps below to create a CRM user.

> **Note:** These steps must be performed for each CRM user you want to create.

Prerequisites:

In order to create CRM users, you must be assigned System Administrator level rights.

Steps:

1. Log in to Oracle Applications (the Forms-based application).

   A list of responsibilities appears.

2. From the list of responsibilities, select the **System Administrator** responsibility, and click **OK**.

   The Navigator - System Administrator window appears.

3. From the Navigator - System Administrator window, double-click **Security**.

   The Security node expands.

4. Under the Security node, double-click **User**, then select **Define.** Click **Open**.

   The Users window appears.

5. In the User Name field, type the user name you want to assign.

6. In the Person field, click the list of values (LOV) button and select the HRMS employee you want to link to the new CRM user.

   Note: To activate the LOV button, you must first click in the field.

7. In the Password field, type a password for the CRM user.

   Note: The password you enter will be used as a temporary password and should be changed when the user logs on to the CRM applications for the first time.

8. In the Responsibilities field of the Responsibilities tabpage, click the LOV button and select the responsibilities to which the CRM user should have access.

   Note: To activate the LOV button, you must first click in the field.

   When you select a responsibility from the LOV, the other fields populate with values except for the Effective Date To field. Optionally, you can enter a value in this field.

   a. If the CRM user should have access to UWQ administrator functions, select the **Universal Work Queue – Administrator** responsibility.

   b. If the CRM user should have access to Advanced Inbound administrator functions, select the **Call Center Administrator** responsibility.

   c. If the CRM user should have access to routing administrator functions, select the **Routing Administrator** responsibility.

   d. To give the CRM user access to the UWQ client, select the **Universal Work Queue Selector** responsibility.

   e. The Advanced Outbound user also requires use of Oracle TeleSales, so you must select the appropriate responsibility to provide the user with access to the functions needed. For example, the TeleSales responsibility is defined in the CRM applications as a responsibility that enables users to access the Oracle TeleSales functionality of leads and opportunities.

Note: You can create responsibilities for your CRM applications that provide access to specific functionality. You can then use your specifically defined responsibilities when assigning CRM user responsibilities in this step. For example, if your Oracle Applications system is set up with a Call Center Administrator responsibility that provides access to the UWQ, OTM, and Routing Administrator responsibilities, you only need to select the Call Center Administrator responsibility to provide that user with access to the necessary administration functions.

9. On the Main Toolbar, click the **Save** icon.

   The new CRM User is created.

See Also:

Understanding Oracle Advanced Outbound

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Other Administering Tasks

3.0.5 Setting User Profile Options

Call center agents can view their tasks and media items using the Universal Work Queue (UWQ) GUI, made available to them though the business application. To be able to request the next e-mail interaction from UWQ, users with Agent responsibilities need to have UWQ default profiles established for them.

Oracle Applications uses the ICX user profile options to determine the system use type setting for your site users or individual users.

UWQ assigns work to agents based on their UWQ profile options settings. Profile options can be set for entire business sites or for individual users. UWQ provides user access to all the CRM application functionality that a user's assigned responsibility enables him or her to access. However, the UWQ user profile options can be used to limit a user's access to specific functionality.

Note: The most common use of the UWQ user profile options is to disable access to a particular type of work for a specific agent.

Note: This step should only be performed for users with Agent responsibility.

The following is a list of user profile options for TeleSales agents:

ICX profile options for TeleSales agents:

- ICX: Language: This option specifies the language that the user prefers to use when working on media items.
- ICX: Territory: This option specifies the territory in which the user is assigned to work. The value assigned to this option is used in determining media items routing.

UWQ profile options for people who handle media items (inbound or outbound telephony, etc.):

- IEU: Desktop: UI: Refresh Style: This option specifies the refresh strategy for the UWQ GUI. Oracle recommends that you set the refresh style to Manual or Login.
- IEU: Desktop: UI: Show All Nodes: This option determines whether UWQ should show nodes that are empty (zero count). The value of Yes is assumed if the value is null.
- IEU: Media: Telephony: This option determines whether a user can work on telephony media items.
- IEU: Optional: Phone Extension: This option specifies the phone extension for the user, when using Oracle SoftPhone for telephony. Oracle recommends that you leave this blank unless the agent will always sit at the specified workstation. Once a phone extension is entered, the "enter extension" screen will not appear when the agent logs into the UWQ. If the agent sits at another desk, the agent's calls will be sent to the extension that is hard coded into the UWQ profile.
- IEU: Queue: Inbound Telephony**:** This option determines whether a user can work on inbound telephony media items.
- IEU: Queue: Outbound Telephony**:** This option determines whether a user can work on outbound telephony media items.

Note: When a user logs in to the UWQ, the user can work on the type of media items to which his or her assigned responsibilities provide access, unless you limit user access to certain functionality by setting values for the UWQ profile options.

For example, if you have been assigned a user responsibility that enables users to access and work on all OTM application type media items, such as inbound telephony or outbound telephony, UWQ enables you to work with the ones that are open and have been assigned to you. However, if your IEU: Queue: Inbound Telephony user value is set to No, the inbound telephony media items will not be delivered to your work queue.

The same is true if the outbound telephony user value is set to No.

Note: The process of setting UWQ profile options for a TeleSales agent users is optional. You do not need to set any of the UWQ profile options, if:

- **You have assigned responsibilities to your users that enable them to access all the functionality that you want them to access, and you do not need to further limit specific user or site access to functionality.**
- **If you are creating a user who will use only the UWQ Administrator responsibility when logged on to the particular user account.**
- **You accept the default values for the UWQ profile options.**

Use the steps below to set user profile options.

Prerequisites:

In order to set user profile options, you must be assigned System Administrator level rights.

Steps:

1. Log in to Oracle Applications (the Forms-based application).

   A list of responsibilities appears.

2. From the list of responsibilities, select the **System Administrator** responsibility, and click **OK**.

   The Navigator - System Administrator window appears.

3. From the Navigator - System Administrator window, double-click **Profile**.

   The Profile node expands.

4. Under the Security node, click **System**, then click **Open**.

   The Find System Profile Values window appears.

5. On the Find System Profile Values window, click the User check box.

   Note: The Site check box is selected by default. Deselect the Site check box if you do not want to view or modify the site profile values. The Profiles with No Values check box is selected by default.

6. In the User field, select the user for whom you want to view or modify UWQ profile options from the LOV.

7. In the Profile field, type one of the following values:

   - ICX% to find all the ICX profile options
   - IEU% to find all of the UWQ profile options

8. Click **Find**.

   The System Profile Values window displays all of the user profile options that match the search criteria that you entered in step 7.

9. From the User column of the System Profile Values window, click the User field for the profile options you want to set and select the value you want it to have from the LOV.

10. Repeat step 9 for each of the profile options you want to set.

11. On the Main Toolbar, click the **Save** icon.

    The new user profile options are saved.

Warning: You can use the steps to set the site values for profile options. However, you must remember that if you do change the site values for a profile option, you also change the default behavior for everyone at your business site. Therefore, ensure that you select only the User check box when finding profile options.

Note: You will need to assign **Yes** to the following IEU: QUEUE profiles for TeleSales:

- **IEU: QUEUE: Forecasts**
- **IEU: QUEUE: Inbound Telephony**
- **IEU: QUEUE: Leads**
- **IEU: QUEUE: Opportunities**
- **IEU: QUEUE: Outbound Telephony**
- **IEU: QUEUE: Tasks.**

Reference:

For detailed information on setting user profile options, see *The Oracle Universal Work Queue Implementation Guide*.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

3.0.6 Defining the CRM User as a Resource

Agents need to be identified as CRM resources so they can be associated with a defined call center.

Note: If you create a user who will only use a UWQ, Call Center, or Routing Administrator responsibility when logged on to the particular user account, you do not need define the user as a resource.

The resource you are defining is the HRMS employee (you created in the Creating an Employee topic). You import and define the resource into CRM Resource Manager from the ERP application database.

Note: If HRMS has not been purchased by your business, an employee can be set up using CRM Resource Manager. For more information on creating a resource, see *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*.

Use the steps below to define a CRM user as a resource

Prerequisites:

In order to define a CRM user as a resource, you must be assigned CRM Administrator level rights.

Steps:

1. Log in to Oracle Applications (the Forms-based application).

   A list of responsibilities appears.

2. From the list of responsibilities, select the **CRM Administrator** responsibility, and click **OK**.

   The Navigator - System Administrator window appears.

3. From the Navigator - System Administrator window, double-click **Resource Manager**, then double-click **Maintain Resources**, then click **Import Resources**, and click **Open**.

   A Selection Criterion window appears.

4. On the Selection Criterion window, select **Employee** from the list of values in the Resource Category field.

5. In the list of values in the Name field, select the name of the HRMS employee whom you want to define as a CRM resource.

6. Click **Search**.

   The application populates the Category and Name fields in the Search Results region.

   > **Note:** The Select check box is selected for the employee resource that you selected. When you use Resource Manager to maintain resources and you select a resource category other than Employee, deselect the Select check boxes for the undesired resources before you click **Create Resource**.

7. Click **Create Resource**.

   The Default Values window opens, and the application populates the Start Date field with the current date.

8. Click **OK**.

   The Selected Resources window opens, displaying the resource selections.

9. Click **Save Resource** to save the employee resource to CRM Resource Manager.

   > **Note:** The Comments field in the Selected Resources window indicates whether the resource entry is a new record or a duplicate record or has a new role definition.

10. Om the Selected Resources window, click **Details**.

    The Resource window opens.

11. From the Resource window, click the Roles tab (if it is not already open).

12. In the Role Type fields of the Roles tabpage, use the LOV to select **Callcenter.**

13. In the Role field, use the LOV to select **Call Center Agent**.

14. In the Role Type field directly below the one in which you selected **Callcenter**, select **Telesales**.

15. In the Role field directly below the one in which you selected **Call Center Agent**, select **Telesales Agent**.

16. Click the Interaction Center tab.

    The Interaction Center tabpage appears.

17. In the Interaction Center field, use the LOV to select the interaction center organization to which you are assigning the employee as a resource.
18. Optionally, in the Scripting Agent Login field, type a login for the scripting agent if the employee will be using Oracle Scripting.
19. In the Telephony Parameters region, use the Middleware field LOV to select the middleware configuration for the agent.
20. Using the Parameter field LOV, select a parameter.

    Note: Which telephony parameters are required and what values to specify depend on the types of switch and CTI middleware used in the call center. For complete instructions, refer to *Implementing Oracle Telephony Manager,* Setting Up Telephony Parameters.

    For example, if a Lucent Definity switch and Dialogic CT-Connect middleware are used, then configure the following parameters:

    - ACD Data 1 is the agent's ACD login password.
    - ACD Data 2 is the agent's ACD login ID.

21. In the Value field, enter the appropriate value.

    Note: For complete instructions, refer to *Implementing Oracle Telephony Manager*, Setting Up Telephony Parameters.

22. Optionally, use the Email Parameters region to specify the agent's e-mail account, parameter, and value if the agent will be using Oracle eMail Center to work with e-mail.
23. Save the resource.

    Note: You can use the other tabbed pages in the Resource window to further define details for the resource.

Reference:

For information on creating a resource, see *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

3.0.7 Configuring a TeleSales User for Advanced Outbound

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

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

To configure TeleSales users for Advanced Outbound, you must connect the user with the campaign. There are two ways to do this. You can either:

- Assign outbound campaigns to agents

  or

- Assign agents to outbound campaigns

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

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

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

3.0.7.1 Assigning Oracle TeleSales Agents to Outbound Campaigns

Use this method if you have many campaigns that change frequently. This method allows you to add or remove agents quickly for these campaigns, and it is a simple way to assign campaigns to agents.

Steps

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

   The Campaign Assignment window appears.

2. From the Campaign Assignment window, click the Resource tab.

3. In the Assign To region of the Resource tabpage, click either the **Resource** or **Resource Group** radio button.

   - Resource - An agent resource
   - Resource Group - A group with multiple agents assigned to it

   ---

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

   ---

4. In the Campaign Name field, type the name of the Oracle Marketing Online campaign to which you want to assign the resource. Click **Find** to search for campaigns.

5. The Current Campaign Assignments region contains the following fields:

   - Code - The code for the campaign that is assigned by OMO
   - Type - The type of campaign, such as: inbound, outbound, e-mail, direct marketing, etc.
   - Name - The name of the campaign

6. In the Valid Campaigns region, if you highlight a valid campaign, you can click **Campaign Details** to receive additional description information. The valid campaigns are displayed for either the resource or the resource group that was selected in the Assign To region of the window.

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

8. Click **Close** to close the window.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

3.0.7.2 Assigning Outbound Campaigns to Oracle TeleSales Agents

You typically use this tabbed page if you have one or two campaigns that are always running. This is a simple way to assign agents to a campaign.

Steps

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

   The Campaign Assignment window appears.

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

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

6. The Teleagent Resources Assignments region contains the following fields:
   - Name - The name of the campaigns to which the resource or resource group is assigned
   - Start Date - The date that the resource or resource group were assigned to the campaign

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

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks

3.0.8 Setting List Priority Values

Oracle Advanced Outbound ships with the following List Priority Values:

- Highest
- High
- Medium
- Low
- Lowest

If you want to modify or add to these values, you must log into Self-Service Apps (forms) as sysadmin, select the Application Developer responsibility, click Application, then Lookups, then Application Objects Library (AOL).

For more information, refer to the *Oracle Interaction History Concepts and Procedures Guide*.

See Also:

Understanding Oracle Advanced Outbound

Administering Advanced Outbound From the HTML Admin Console

Other Administering Tasks