

Oracle® eMail Center

Concepts and Procedures

Release 11*i*

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ORACLE®

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Oracle eMail Center Concepts and Procedures, Release 11*i*

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Preface

This manual describes using Oracle eMail Center.

Intended Audience

This manual is intended for consultants and system administrators who are interested in setting up and using Oracle eMail Center.

Structure

The Understanding Chapter explains the basic concepts and provides an overview of Oracle eMail Center.

The Using Chapter gives step by step instructions of using certain features of Oracle eMail Center.

Related Documents

For more information, see the following manuals:

- *Oracle eMail Center Implementation Guide*

Conventions

In this manual, Windows refers to the Windows95, Windows98, and the Windows NT operating systems.

Other Product One refers to Oracle Other Product One for Windows and Oracle Other Product One for UNIX software.

Version 7.0 of Oracle Other Product One software may be referred to as Other Product Two7.

The SQL interface to Oracle Other Product One is referred to as SQL. This interface is the Oracle Other Product One implementation of the SQL standard ANSI X3.135-1992, ISO 9075:1992, commonly referred to as the ANSI/ISO SQL standard or SQL92.

In examples, an implied carriage return occurs at the end of each line, unless otherwise noted. You must press the Return key at the end of a line of input.

The following conventions are also used in this manual:

Convention	Meaning
.	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[]	Brackets enclose optional clauses from which you can choose one or none.

Understanding Oracle eMail Center

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

1.1 Overview of eMail Center (eMC)

Oracle eMail Center is a complete solution for managing both inbound and email interactions with customers, partners, suppliers, employees and other entities that interact with an organization. Oracle eMail Center provides an agent with tools and capabilities to maximize their productivity and effectiveness.

Oracle eMC is part of the CRM Interaction Center suite of products. eMC leverages the core CRM schema for managing resources, customers, and interactions. This enables eMC to be integrated at the schema level with all other CRM applications.

Oracle eMail Center invokes appropriate customizable processes that are targeted to handle different types of inbound email interactions. Every inbound email is analyzed using the Oracle Text component of the Oracle 8i database to determine the intent of the message based on its linguistic properties. Oracle Text provides a string of keywords, which are utilized by the intent engine to categorize the email. eMail Center also uses the same set of keywords to search the Knowledge Base for documents related to each intent. The email is then classified and routed to a queue based on user-defined rules. These rules use data extracted from the email header, email intent, and system variables.

When the first available agent requests the next email interaction from the queue, the email is assigned to that agent and can no longer be viewed by other agents who are handling that queue. The suggested responses and their respective intents are available to the agent for easy point and click selection.

Agents can also access the knowledge base repositories and attach documents to the email response. Additionally, the agents can browse through the folders on their desktop and select documents to be attached.

In addition to managing inbound email interactions, eMail Center provides capabilities to initiate and manage outbound interactions. An agent can be provided with a set of templates or style sheets for composing outbound emails, which are not in response to an incoming email. The agent can either compose an email using the full featured editor or by retrieving pre-defined documents from the Knowledge Base.

Oracle eMC has a Self-Service Administration (SSA) console providing a unified set of screens to guide a customer through the implementation, configuration, and administration process. SSA supports the setup and administration of routing and classification rules, intents, documents, and queries. In addition, SSA enables the creation of Oracle Email Server accounts and customization of the eMC configuration.

Oracle eMail Center is a comprehensive email interaction management solution for proactive relationship management that ultimately translates to a better customer experience.

This concepts and procedures guide is divided into two sections:

- [Self Service Administration Console](#)
- [eMC User Interface \(eMC UI\)](#)

Using Self Service Administration Console:

- [Creating a Default Interaction Center Server Group](#)
- [Creating a Default Customer](#)
- [Creating Employees with HRMS](#)
- [Creating an Application User and Assigning Responsibilities](#)
- [Setting CRM Resources](#)
- [Defining a Resource Group for Email Routing](#)
- [Assigning JTF Roles](#)
- [Setting Site Profile Settings](#)
- [Creating a Default Configuration](#)
- [Creating a Custom Configuration](#)

- Creating Accounts
- Creating Classifications
- Associating Classifications to Accounts
- Creating Resource Groups
- Creating Routes
- Associating Routes to Accounts
- Creating Intents and Keywords
- Updating an Intent
- Updating Keywords
- Setting Intent Options
- Creating Category in MES
- Defining a Hierarchy Among the Categories
- Uploading Documents into MES
- Verifying the Document Uploaded Successfully
- Deleting Published Documents
- Creating a Query
- Associating a Document and a Query

eMail Center User Interface

- Home Page
- Message Tab
- Compose Tab
- Knowledge Base Tab
- Search Tab

Using eMail Center User Interface

- Replying to an Email
- Making Edits to Attachments
- Viewing Suggested Responses

- [Searching for Customers](#)
- [Previewing Inbound Messages](#)
- [Composing an Email](#)
- [Wrapping up the Interaction](#)
- [Browsing Knowledge Base Categories](#)
- [Searching Knowledge Base](#)
- [Inserting or Attaching a Document from the Knowledge Base](#)
- [Using the Search Tab](#)

1.2 Self-Service Administration (SSA) Console

SSA is a set of common screens for implementing, configuring, and administering eMail Center from a single login, which enables the setup and management of eMail Center with minimal training.

SSA is user friendly and chronological formatted for simple navigation and step-by-step set up.

Key features and benefits of Self-Service Administration Setup screens include the following:

- Overall Ease of Use.
- Integration with Marketing Encyclopedia System (MES) Administration.
- Integration with One-to-One Fulfillment Administration.
- Auto configuration of eMail Center from a single input screen.
- Graphical User Interface for defining classification and routing rules.
- Simplified email account creation.

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1.3 Self-Service Administration Console: Setup Sub Tab

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Warning: For all new eMC installations, starting with and including Minipack L, you must use the Self-Service Setup and Administration Console. For pre-Minipack L, eMC installations and administration changes to pre-Minipack L installations, you must use the eMC Administration Console.

Note: Prior to configuring the system using SSA, perform the following steps:

1. Create a Default Interaction Center Server Group.
 2. Create a Default Customer.
 3. Setting Site Profiles.
-
-

1.3.1 Default Configuration

Default Configuration enables you to create a server group, define the Oracle Email Server (OES) database, create two database links to the OES database, define the IMAP and SMTP servers, and create two email accounts (intent and test).

Once the Default Configuration has been executed or an eMail Center Custom Configuration set up, it will not be possible to access this screen. To view or change a configuration, use eMC Custom Configuration from the Administration sub tab menu.

Removing a configuration (e.g., all server groups, database servers, database links, and Email Server entries) will enable access to the eMC Default Configuration screen.

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Caution: Before clicking Create, be certain that all the fields contain the correct data. Once you click Create, you cannot access the Default Configuration screen to make changes; you must use the Custom Configuration menu option to make changes to the Default Configuration.

If you attempt to re-enter the Default Configuration screen subsequent clicking create for the first time, you will receive a message similar to this:

eMail Center configuration has already been set up. To view or change the configuration, use Custom Configuration under Administration.

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1.4 Custom Configuration

The Custom Configuration can be used for updating the Default Configuration data or creating a custom configuration.

Custom Configuration has four sub menu items:

- [Server Group](#)
- [Database Server](#)
- [Database Link](#)
- [Email Servers](#)

Some of the columns in each of the sub menu's screens contain hyper-links. The hyper-links enable you to access each sub menu's respective details screen.

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1.4.1 Server Groups

You can use the Server Group screen to remove, create, or update your Server Group and Database Server. The data in the Group Name and Database Server columns contain hyper-links. By clicking on them, you will access their respective detail's screen.

[Return to Creating a Customer Configuration.](#)

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1.4.2 Database Servers

You can use the Database Server Screen to remove, update, or create your Database Name, Global Name, Host Name, Port, Protocol, Database SID, link to application database, and RT Availability. The Database Name is hyper-linked. By clicking on the hyper-link, you will access the details page for the Database Name. Fill in the fields.

[Return to Creating a Customer Configuration.](#)

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1.4.3 Database Links

You can use the Database Link screen to remove your database link or create a link by entering the Database Name, Database Global Name, and User (OO or ORAOFFICE, and password). The Database Link screen contains no hyper-links. You can only create or remove a database link.

[Return to Creating a Customer Configuration.](#)

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[Return to eMC User Interface Overview.](#)

1.4.4 Email Servers

You can use the Email Server screen to remove, update, or create the Server Name, DNS Name, IP Address, Port, Server Type, and RT Availability. The Server Name is hyper-linked. By clicking on the hyper-link, you will access the Server Name details page.

[Return to Creating a Customer Configuration.](#)

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1.5 Email Accounts

The Account Screen is used to organize emails into business areas. For example, if you are in the insurance business, you might create an account for automobile, claims, medical, sales, and customer support, thus representing each area in your insurance business.

Agents can be assigned to one or more email accounts.

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1.6 User Accounts

Oracle eMail Center ships with three default responsibilities: eMail Center Self Service Setup, eMail Center Stand Alone Monitoring Administration, eMail Center Stand Alone Agent. The process of setting up users with each of these responsibilities consists of several steps:

1. Creating an employee (forms application).
2. Creating an application user and assigning user responsibilities (forms application).
3. Creating CRM Resource (forms application).
4. Assigning JTF Role (HTML Application).

Table 1-1 depicts the three default responsibilities and indicates their required steps, which is displayed as an ex (X):

Table 1–1

Default Responsibilities	Step 1	Step 2	Step 3	Step 4
eMC Stand Alone Monitoring Administration	X	X		
Self Service Setup	X	X	X	X
eMC Stand Alone Agent	X	X	X	

1.7 Classifications

Classifications are user-defined categories or queues that emails are placed in depending upon their properties and content. For example, classifications could be used to define various service levels, distinguish between customers, and etc.

This classification can also be used by the routing engine as one of the criteria upon which an email is delivered to a group of agents.

Classifications cover the following classification areas:

- [Creating Classifications](#)
- [Associating Classifications to Accounts](#)
- [Classification Priorities](#)
- [Classification Account Association Enabled Flag](#)

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1.7.1 Classification Priorities

Classification priorities are used to determine the order in which each Classification and its rules are executed. The priority of each Classification is unique; the priority can be changed; and, in doing so, it will affect the values of other classification priorities. If you increase the value of a priority, the priorities of all the Classifications with a value greater than or equal to the original value decreases by one. If you decrease the value of a priority, the the value of all the classifications with a value equal to or less than the original value increases by one. By default, newly defined classifications are assigned the lowest priority among the existing classifications.

[Return to Classifications Section.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

1.7.2 Classification Account Association Enabled Flag

The Account Association screen enables Classifications to be associated with an email account. This account association must be enabled in order for a classification to be executed. Classifications that are not enabled will not be executed.

[Return to Classifications Section.](#)

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1.7.3 Classifications to Accounts

One or more classifications must be associated to an email account, in order for incoming emails addressed to that account to be assigned to the respective queue.

[Return to Classifications Section.](#)

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1.8 Resource Groups

eMC uses resource groups in the email routing process. The resource groups are used as the destination and default destination groups in the Route Account Association screen.

All resources groups created for use by the eMC should be of type: *Static*.

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1.9 Routes

Oracle eMC automatically routes incoming emails to an agent group based on user-defined rules. These rules are constructed using key value pairs extracted from the properties and content of the email. The routing rules are executed in the descending order of priority. If none of the rules are satisfied, the email is routed to all agents belonging to that account.

Emails are always routed to an agent group and not to the individual agent. An agent (resource) group is only valid if it contains at least one resource, which is assigned to the email account and has one of the Email Center Agent, Email Center Supervisor, or Email Center Manager roles assigned to it.

Routes cover the following route areas:

- [Associating Routes to Accounts](#)
- [Route Priorities](#)

- [Route Account Association Enabled Flag](#)
- [Route Execution and Destination Groups](#)
- [Creating Routes](#)

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1.9.1 Route Priorities

Route priorities perform the same function as Classification priorities; they are used to determine the order in which each Route and its rules are executed. The priority of each Route is unique; the priority can be changed; and, in doing so, will affect the values of other classification priorities. If you increase the value of a priority, then the priorities of all the classifications with a value equal to or greater than the original value decrease by one. If you decrease the value of a priority, then the value of all the classifications with a value equal to or less than the original value increases by one. By default, newly defined routes are assigned the lowest priority among existing routes.

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1.9.2 Route Execution and Destination Groups

The routing engine evaluates routes in order of priority, starting with 1. The first route rule that evaluates as true will determine the routing destination. At the end of the email processing, an email will have ONE and ONLY ONE destination (resource) group assigned to it. The routing engine will check the validity of a Destination group before routing an email to that group; if the group does not contain a valid set of resources, the email is routed to the Default Destination Group. If the Default Destination Group does not contain a valid set of resources, the email is routed to all user groups.

If the routing rules have been setup, but none are valid for the email being processed, the email is routed to all user groups. If there are no routes or groups setup, emails will be routed to all user groups.

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1.9.3 Route Account Association Enabled Flag

The Account Association screen enables Routes to be associated with an email account. This Account Association must be enabled in order for that route to be executed. Routes that are not enabled will not be executed.

[Return to Route Section.](#)

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1.9.4 Associate Routes to Accounts

You can associate incoming emails to specific destination groups within your business. One or more routes must be associated to an email account, in order for incoming emails addressed to that account to be routed to the respective destination group.

[Return to Route Section.](#)

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1.10 Email Intents and Keywords

The eMC Intent Engine enables a business to group emails pertaining to a specific business area based on the content of the email. This grouping is referred to as "intent".

Intents enable agents to identify the broad area pertaining to the email and assist in the selection of appropriate responses.

An example of intents for a hardware company would be Accessories, Service, Product Information, Installation; or, in the medical company, intents could be claims, insurance, and doctors.

Oracle eMail Center uses the Oracle Text feature of the Oracle database (versions 8i or later) to analyze incoming email messages based on the linguistic properties of the various parts of the email, such as header, subject, body, and attachments.

Each intent has a set of underlying keyword signatures that are used to categorize emails. A keyword signature is a combination of the keywords and their respective scores for each intent.

All incoming inbound emails are processed by Oracle Text to generate a keyword signature. Emails are categorized by comparing the incoming message keywords with the intent keywords stored in the intent engine. The top ten best matches are selected.

After a message is categorized, eMC uses the response and message keyword string for each intent and uses that to query the Knowledge Base repositories to retrieve the suggested responses.

This section discusses the following topics:

- [Creating Intent and Keywords](#)
- [Updating an Intent](#)
- [Updating Keywords](#)
- [Setting Intent Options](#)

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1.11 Documents

The Document menu option allows you to create categories in Marketing Encyclopedia System (MES), define hierarchy among the categories, and publish documents in any of the categories.

For more detailed information refer to the *Concepts and Procedures for Oracle Marketing Encyclopedia System (MES)*.

For creating solutions sets in the Solution Management System (SMS), refer to *Oracle Concepts and Procedures for iSupport*.

This section discusses the following topics:

- [Uploading Suggested Response Documents and Templates in MES](#)
- [Creating a Category in MES](#)
- [Defining a Hierarchy Among the Categories](#)
- [Uploading Documents Into MES](#)

- [Verifying the Document Uploaded Successfully](#)
- [Deleting Published Documents](#)

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1.12 Query Tab

A document may or may not contain merge fields. A merge field is a place holder, for a variable which gets automatically filled when a query associated with document is fired. The associated query is executed when a response document is selected. The merge fields need to be enclosed within special tags, "« ", which can be entered by holding down the "Alt" key and typing "0171" on the numeric keypad (with the Num Lock Turned off), and "» ", which can be entered by holding down the "Alt" key and typing "0187" on the numeric keypad (with the Num Lock Turned off).

For example:

Dear «CP_FIRST_NAME» «CP_LAST_NAME»,

Thank you for your interest in «PRODUCT_NAME». This product will be released on «RELEASE_DATE».

This section discusses the following topics:

- [Creating a Query](#)
- [Associating a Document and a Query](#)

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1.13 eMail Center User Interface

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

eMail Center User Interface (eMC UI), enables you to manage and view email activities.

eMC UI consists of the following tabs:

- [Message](#)

- [Compose](#)
- [Knowledge Base](#)
- [Search](#)

In addition to the eMC UI tabs, a home page exists.

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1.14 Home Page

When you log on, the eMC home page is displayed. This home page displays the email accounts assigned to you and the classifications for each of the accounts. The queue named "All" enables you to fetch the oldest email across all classifications. To fetch an email, you need to enter a check in the radio button next to the corresponding classification and then click on **Get Message**. The Inbox Summary section displays the number of emails fetched by you, which have not been responded to. The account name is provided as a hyper-link, which when clicked, will take you to the "My Inbox" screen and display your list of unresolved emails.

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1.15 Message Tab

The Message tab has two sub-tabs:

- [Queued Messages](#)
- [My Inbox](#)

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1.15.1 Queued Messages Sub Tab

This screen allows you to select unassigned email messages out of specific classification queues.

The total number of emails for each classification queue pertaining to every account that agent has access to is displayed. The emails satisfying the routing rules are available to you. The email will get assigned to you when you fetch the email from queue. The queue named "All" enables you to fetch the oldest email across all classifications.

When you select a message from one of the queues by clicking on **Get Message**, that email message is moved from the classification queue to your Inbox and no other agent can access that message. You will now be sent to the the Reply screen with the content of the incoming email automatically inserted in the response.

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1.15.2 My Inbox Sub Tab

The My Inbox sub tab displays the contents of your inbox for every account that you have access. You can respond to a message by clicking on the Subject of the email, which is provided as a hyper-link. You can switch between accounts by selecting a different account name from the drop down list.

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1.16 Compose Tab

The Compose tab supports two operations: it allows you to respond to an incoming message using the Reply screen or create a new email message using the Compose screen. If you fetch an email interaction or open an email from your inbox, the Reply screen is displayed with the contents of the incoming email automatically inserted into the response. If you navigate across tabs while responding to this email, the current state of the response is saved and is displayed again when you click on the Compose tab.

If you are not responding to an incoming email, you can compose a new message by clicking on the **Compose** tab. If, while composing this new outbound message, you decide to fetch an incoming message, then the draft of the outbound message is cached. You can view that draft after responding to the incoming email just fetched and then clicking on the **Compose** tab.

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1.17 Customer Search

The basic customer information is displayed in the Reply screen; however, the customer information will only be displayed if a valid customer record based on the email address match is found. To record an interaction, a customer ID is required. If a customer is not found on an email address match, the Default Customer ID (defined during the setup process) will be used, unless you manually search and select a customer. Preferably, an interaction must be associated with a valid customer.

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1.18 Wrap up the Interaction

An interaction record is created when you fetch an email from one of the queues or open an email transferred to you by another agent. The interaction record is closed when you perform a Send, Transfer, or Delete operation. The information pertaining to that interaction is then recorded using the wrap up screen.

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1.19 Knowledge Base Tab

Knowledge Management system comprises of the Marketing Encyclopedia System (MES) and the Solution Management System (SMS). MES is the primary repository used by Oracle eMail Center to store response documents and message templates. SMS is a key component of the iSupport application and stores solution sets, which detail the relationship between problems and their respective solutions.

The Knowledge Base tab provides you with the capability to navigate through the categories created in the MES repository and search for specific documents in both

MES and SMS repositories. The documents stored in either of these repositories can be viewed and attached to or inserted into a response or email message being composed.

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1.20 Search Tab

The Search tab provides the functionality that enables you to search for archived emails. You can search for emails in system folders: Resolved, Sent, Deleted, or in your Inbox. The search is account based; hence, you select a particular account and a specific folder within that account for the search operation.

Using Oracle eMail Center (eMC)

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

2.0.1 Replying to an Email

The Reply screen is displayed when you fetch an incoming email message from one of the queues or when you open an email from you inbox. The contents of the incoming email are automatically inserted into the response. The following functionality is made available to you while responding to an incoming email:

Edit Attachments: Enables you to attach documents to the response from their local file system.

Search (Customer): Enables you to search the database for a valid customer record that will be associated with the current interaction.

More (Suggested Responses): The top five suggested responses documents (based on the score) for the top intent (based on the score) are displayed in the Top Suggested Responses bin. You can insert or attach any of these documents without having to view their contents. If you wish to view suggested response documents other than the top ones displayed, you can do so by clicking on the "More..." link within the Top Suggested Responses bin.

View Original Message: Enables you to view the incoming message in a separate preview screen rather than scroll down the editor box in the Reply screen. You can also view the attachments that came along with the inbound message by clicking on the file name of the attachment displayed as a hyperlink.

The Reply screen provides the following option, while responding to an incoming email:

Send: Send the response to the customer. The incoming message is moved from the agent's inbox to the Resolved folder and a copy of the response is stored in the Sent folder.

Delete: Delete the incoming message. The incoming message is moved from the agent's inbox to the Delete folder. It is NOT physically deleted from the message store.

Transfer: Enables you to transfer the email to another agent. The email is moved from one agent's inbox to another agent's inbox.

Save: Enables you to save a draft of the response if you are unable to complete the interaction. The draft of the response is stored in the Drafts folder and a link between the incoming message and the draft response is created. Later, when you open the same incoming email from the inbox, the draft of the response that was composed earlier is displayed in the Reply screen.

Cancel: Enables you to cancel the current interaction. The incoming message is retained in your inbox and can be viewed from the My Inbox screen.

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2.0.2 Making Edits to Attachments

The Edit Attachments screen enables you to attach documents from your local file system and remove documents that were previously attached to the response. The Browse button enables you to browse through your local file system and select any documents to be attached to the response. To remove a document that was previously attached, you put a check mark in the box next to it and click on **Update** button. The Edit Attachments screen has the following buttons:

Browse: Launches the Windows explorer, which enables you to browse through the file system.

Add: Attaches the selected document to the email.

Update: Deletes all the attachments whose corresponding remove boxes have been checked.

Done: Returns the user to the Reply/Compose screen.

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2.0.3 Viewing Suggested Responses

You can view the contents of any one of the top suggested response documents by clicking on the title of the document. The "More..." link displayed in the "Top Suggested Responses" bin in the Reply screen, provides you with an access to additional suggestions for response documents that might help you in providing a solution to the particular problem.

The Intent (and their scores) pertaining to the inbound message and the list of suggested response documents (and their scores) for each intent are displayed on the left hand side.

If a document contains merge fields, Oracle eMail Center will try to populate them automatically based on information extracted from the email. However, if the merge fields cannot be populated automatically, then the agent will have to manually select the "Merge" option.

By default, the content of the top suggested response (based on score) for the top intent is displayed whenever an agent elects to view additional response documents.

If a document does NOT contain merge fields, then the following buttons are available:

Insert and Return: Inserts the selected document into the response and returns you to the Reply screen.

Attach & Return: Attaches the selected document into the response and returns you to the Reply screen.

Insert: Inserts the selected document into the response and displays a confirmation. You remain in the Suggested Responses screen, so that you can insert or attach multiple documents into the response.

Attach: Attaches the selected document into the response and displays a confirmation. You remain in the Suggested Responses screen, so that you can insert or attach multiple documents into the response.

Return: Returns you to the Reply screen without inserting or attaching a document into the response.

If the document contains merge fields, then the following buttons are available:

Merge and Insert: Executes the associated query, populates the merge fields, inserts the selected document into the response, and display a confirmation. You will

remain in the Suggested Responses screen, so you can Insert or Attach multiple documents into the response.

Merge, Insert, and Return: Executes the associated query, populates the merge fields, inserts the selected document into the response, and returns the agent to the Reply screen.

If eMail Center could not find the value for the merge parameters from the data extracted from the email, then the agent has to enter the query parameters manually and view the results using the following button:

View Merge: Executes the associated query, populates the merge fields, and displays the document with the merge fields to enables verification.

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2.0.4 Searching for Customers

When you click on the **Search** link in the Customer bin on the Reply screen, the Customer Search screen is displayed. You can query on one or more of the search parameters. Query parameters are case sensitive and a wildcard is automatically appended for string searches.

The customer records fetched based on the query parameters entered are displayed in the Customer Search Results screen. The full name of the customer is provided as a hyper-link. When clicked, it displays detail information pertaining to the customer in the Customer Detail screen. You can select a particular customer for the current interaction in one of the following ways:

- In the Customer Search Results screen, click on the radio button next to the customer name, and click on **Select**.
- In the Customer Detail screen, click on **Select**.

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2.0.5 Previewing Inbound Messages

You can view the inbound email without having to scroll down the editor box text by clicking on View Inbound Message button in the Reply screen. The content of the incoming email is displayed in the Inbound Message screen.

The following is a list of options available to an agent in the Inbound Message screen:

Delete: Delete the incoming message. The incoming message is moved from the agent's inbox to the Delete folder. It is NOT physically deleted from the message store.

Transfer: Enables you to transfer the email to another agent. The email is moved from one agent's inbox to another agent's inbox.

Cancel: Enables you to cancel the current interaction. The incoming message is retained in your inbox and can be viewed from the My Inbox screen.

Return: Returns you to the Reply screen.

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2.0.6 Composing an Email

You can compose a new message, rather than replying to an inbound message, by clicking on the Compose tab. You will NOT be able to compose a new message if you are in the process of responding to an incoming email. In other words, if you have a partially composed response open, you have to end the interaction by sending the response, deleting the incoming email, saving the partial response or canceling the operation before starting a new email.

The following functionality is made available to the agent while composing a new email:

Edit Attachments: Enables you to attach documents to the email from your local file system.

Search (Customer): Enables you to search the database for a valid customer record that will be associated with the current interaction.

More (Templates): Oracle eMail Center also provides you with the capability to use pre-designed templates or style sheets while composing new emails. Five such

templates are displayed in the Compose screen. You can view the remaining templates by clicking on the "More..." link available in the Templates bin.

The Compose screen provides you with the following option while composing a new email:

Send: Send the email to the customer. A copy of the outbound email is stored in the Sent folder.

Cancel: Enables you to cancel the current interaction. You are taken back to the Queued messages screen.

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2.1 Wrapping up the Interaction

You must select a value from the drop-down list available for each of these mandatory fields. The default value is displayed for each of these fields is based on whether you performed the Send, Delete, or Transfer operation to end the interaction.

The following options are available to you from the wrap-up screen:

Update and Fetch: Updates the Interaction record and fetches the next interaction from the same queue.

Update and Return: Updates the Interaction record and returns you to the Queued Messages screen.

Restore Defaults: Restores the default values for each of the fields.

Cancel: Cancels the requested operation and returns you to the previous screen. The Send, Delete, or Transfer operation is not performed until you click on **Update and Fetch** or **Update and Return** button.

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2.1.1 Browsing Knowledge Base Categories

When you click on the Knowledge Base tab, the MES categories are displayed by default.

The category names are hyper-linked. When clicked, it will display the titles of documents published under that category and other sub-categories. You can navigate down the category tree using the hyper-linked category names. You can also view the content of a particular document by clicking on the document title, which is hyper-linked. You are provided with the option of inserting or attaching the document to the response or message being composed.

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2.1.2 Searching Knowledge Base

In addition to browsing through categories, you can search for a document using the functionality provided under the Search sub-tab. You can enter a value for any of the query parameters and click on **Search** button.

The list of documents that match the search criteria are displayed in a tabular format. The document title is provided as a hyper-link. When clicked, it will display the contents of the document and provide you with the capability to insert or attach it to the response.

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2.1.3 Inserting or Attaching a Document from the Knowledge Base

You can navigate through the hierarchy or use the search option to find a document; the contents of the document can be viewed by clicking on the title of the document.

If the document contains no merge fields, then the following buttons are available:

Insert and Return: Inserts the selected document into the response or message being composed and returns you to the Reply or Compose screen respectively.

Attach and Return: Attaches the selected document into the response or message being composed and returns you to the Reply or Compose screen respectively.

Insert: Inserts the selected document into the response or message being composed and displays a confirmation. You remain in the category you selected the document from, so that you can insert or attach multiple documents into the response or message being composed.

Attach: Attaches the selected document to the response or message being composed and displays a confirmation. You remain in the category you selected the document from, so that you can insert or attach multiple documents into the response or message being composed.

Return: Returns you to the Reply or Compose screen without inserting or attaching a document into the response or message being composed.

If the document has merge fields, and if eMC could find the value for the merge parameters from the data extracted from the email, the query associated with the document will be executed and the merge fields in the document will be populated automatically; however, in the case where eMC could not find the value for the merge parameters from the extracted data, or if you compose a new email message, you will not have to enter the query parameters manually in the screen.

Click on one of the following buttons to execute the associated query.

View Merge: Executes the associated query and displays the document with the populated merge fields to enable verification.

Merge and Insert: Executes the associated query, populates the merge fields and inserts the selected document into the response or message being composed. A confirmation message is displayed; and you remain in the category you selected the document from, so that you can insert or attach multiple documents into the response or message being composed.

Merge, Insert, and Return: Executes the associated query, populates the merge fields, inserts the selected document into the response or message being composed and returns you to the Reply or Compose screen respectively.

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2.2 Using the Search Tab

Apart from the account and folder name, you can enter one or more of the query parameters listed below to refine the search operation:

Subject: Matches the string entered with the subject of the emails archived. This parameter is case insensitive and permits wildcards.

Sender: Matches the string entered with the sender's email address. This parameter is case insensitive and permits wildcards.

Recipients: Matches the string entered with the email addresses of recipients (TO field). This parameter is case insensitive and permits wildcards.

Include Cc: The "Include Cc" box is checked by default. This will enable the search to match the string entered in the Recipients field with the email addresses entered in the Cc field of archived emails.

Message ID: This is the unique ID assigned to every email by the Oracle Email Server. This ID is displayed in the Interaction History view provided for all media of type of email. This parameter is case insensitive and permits wildcards.

Sent Date: The "from" and "to" fields are provided to enable you enter an open ended or a fixed range search. A date picker is provided for each field.

Based on the search criteria entered above, eMC searches the specified account and folder. The results are displayed in the Message Search Results screen in a tabular format. The results are ordered in the descending order of Sent Date by default; however, you can change the ordering by clicking on the respective column heading. The subject of each email is provided as a hyper-link. When clicked, it will display the content of the email in a preview window.

The buttons available to you in the preview window depend on the folder from which the email was selected and the current state of the user interface. If the you currently have no open interactions, which means that you are currently not responding to an email or composing a new email message, then the following options, listed in Table 1-1, are available to you:

Table 2-1

Folder	Buttons
Resolved	Back, Reply, Reply All, Forward
Deleted	Back, Reply, Reply All, Forward
Sent	Back, Resend, Forward
Inbox	Back and Reply

The buttons work as follows:

Back: Takes you back to the Message Search Results page.

Reply and Reply All: It automatically sets the To, Cc, Subject fields in the response and displays the email in the Reply or Compose screen. If the message is retrieved from the Inbox, then the retrieved email will be inserted into a response, and you will be taken to the Reply screen. If the message is retrieved from folders other than the Inbox, you will be taken to the Compose screen and the content of the email inserted into the body of a new email message.

Forward: This option automatically sets the Subject field such that the original subject is prefixed with FW: . You are presented with the message in the Compose screen. Please note that the Forward option automatically adds the attachments received along with the original message.

Resend: This is a one-click button that takes you directly to the Wrap Up screen and resends the message when you select the Update and Fetch or Update and Return option.

This option is only available for archived messages fetched from the Sent folder.

If you were composing a response or a new email message while searching for archived emails, the options available to you in the preview window are different from the ones discussed above. The reason for the difference is the concept of a current message, which is the message currently open under the Compose tab in the Reply or Compose screen. In this case, the following options, listed in Table 1-2, are available to you:

Table 2-2

Folder	Buttons
Resolved	Back and Attach
Deleted	Back and Attach
Sent	Back and Attach
Inbox	Back and Reply

The buttons work as follows:

Back: Takes you back to the Message Search Results page.

Attach: Attaches the historical message to the current message and returns you to the Reply or Compose screen depending on whether the current message is a response to incoming email or a new email message respectively.

Reply: It automatically sets the To, Cc, Subject fields in the response and displays the email in the Reply or Compose screen. If the message is retrieved from the

Inbox, then the retrieved email will be inserted into a response, and you will be taken to the Reply screen. If the message is retrieved from folders other than the Inbox, you will be taken to the Compose screen and the content of the email inserted into the body of a new email message.

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2.3 Creating a Default Interaction Center Server Group

Oracle eMC uses the Resource Manager application to define agents and manage their assignment to email accounts. The Resource Manager application requires an interaction center server group to be selected for creating and maintaining resources (agents); therefore, Oracle eMC requires a default interaction center Server Group.

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Prerequisites

You must have the Call Center HTML Administration responsibility assigned to the user.

Steps

1. From the HTML application login screen, log in using the default system administrator user name and password.

2. Click on the **Profile** icon.

The General Preferences screen is displayed.

3. From the drop down list for Current Responsibility, select **Call Center HTML Administration**.

4. Click **Update**.

The Server Group List screen appears.

5. Click **Create**.

The Create Server Group screen appears.

6. Enter the required fields.

7. Click **Create**.

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2.4 Creating a Default Customer

All interactions have to be associated with a valid customer. The interactions for incoming emails from parties not defined in the system, will be associated with a Default Customer. For information on creating a customer, *Refer to the Concepts and Procedures guide for relevant CRM Business Applications.*

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2.5 Settings Site Profile

Prior to configuring you email center, you must set the profile options for suggested response Knowledge Base, default customer id, and default interaction center server group.

The Profile screen allows you to set eMail Center Site Profile options for the following:

- Suggested Response Knowledge Base Search (e.g., All, MES, or SMS)
- Default Customer ID
- Default Interaction Center Server Group

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Prerequisites

You must have the *eMail Center Self Service Setup* responsibility, *MES Administrator* resource role, and the *JTF_FM_Admin* role assigned to a user.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click the **Profile** icon.

The General Preferences screen is displayed.

3. Click on the **eMail Center** menu option.

The eMail Center Site Profile Options screen is displayed.

4. Enter a value for each of the profile options displayed.

5. Click **Update**.

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2.6 Creating a Default Configuration

Default Configuration enables you to create a server group, define the Oracle Email Server (OES) database, create two database links to the OES database, define the IMAP and SMTP servers, and create two email accounts (intent and test).

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Prerequisites

You must have the *eMail Center Self Service Setup* responsibility, *MES Administrator* resource role, and the *JTF_FM_Admin* role assigned to a user. Setting up eMC Site Profiles.

Assumptions: When using the default configuration screen, you must ensure the following assumptions are valid:

- OES database, protocol, IMAP, and SMTP processes are running on the same machine.
- OES install is set to Custom -- make certain that the setting is not Default.
- The default protocol setting is TCP.
- RT availability is set to Yes.
- Port number 143 must be assigned to the IMAP server.
- Port number 25 must be assigned to the SMTP server.
- The database server name will be automatically assigned to the same value as entered in the database SID entry field.

- Two accounts that were generated are under the domain, which was entered in the domain name field and has a language setting to English.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Setup**.

The eMail Center Configuration screen is displayed.

All fields are mandatory, and must be completed to ensure successful creation of the default configuration.

3. Enter values in all fields displayed.
4. Click **Create**. (Clicking **Clear**, removes all data in their respective fields.)

The following message is displayed:

eMail Center Configuration setup has been completed. To view or change the configuration, please go to eMC Configuration under Administration.

Caution: Before clicking Create, be certain that all the fields contain the correct data. Once you click Create, you cannot access the Default Configuration screen to make changes; you must use the Custom Configuration menu option to make changes to the Default Configuration.

If you attempt to re-enter the Default Configuration screen after creating a configuration, you will receive a message similar to this:

eMail Center configuration has already been set up. To view or change the configuration, use Custom Configuration under Administration.

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2.7 Creating a Custom Configuration

The Custom Configuration can be used for updating the Default Configuration data or creating a custom configuration.

Custom Configuration has four sub menu items:

- [Server Group](#)
- [Database Server](#)
- [Database Link](#)
- [Email Servers](#)

Some of the columns in each of the sub menu's screens contain hyper-links. The hyper-links enable you to access each sub menu's respective details screen.

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Prerequisites

You must have the *eMail Center Self Service Setup* responsibility, *MES Administrator* resource role, and the *JTF_FM_Admin* role assigned to a user. Setting up eMC Site Profiles.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.

The Server Groups screen is displayed.

In the following sections, you can either create a new entry or update an existing one. To create a new entry, click on the **Create** button, and enter the values for the required fields, and click **Create** again.

To update an existing entry, click on the entry name provided as a hyper-link, update the required fields, and click **Update**.

To remove an existing entry, click on the check box in the Remove column, and click on **Update**.

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2.7.1 Server Groups

You can use the Server Group screen to remove, create, or update your Group Name, Database Server, and Email Server. The data in the Group Name, Database Server, and Email Server columns contain hyper-links. By clicking on them, you will access their respective detail's screen. Populate the fields in the details screen to change the settings.

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2.7.2 Database Servers

You can use the Database Server Screen to remove, update, or create your Database Name, Global Name, Host Name, Port, Protocol, Database SID, and RT Availability. The Database Name is hyper-linked. By clicking on the hyper-link, you will access the details page for the Database Name. Fill in the fields.

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2.7.3 Database Links

You can use the Database Link screen to remove or create you database Link Name, Dbase SID, Host Name, Port, and Database Global Name. The Database Link screen contains no hyper-links. You can only create or remove a database link.

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2.7.4 Email Servers

You can use the Email Server screen to remove, update, or create the Server Name, DNS Name, IP Address, Port, Server Type, and RT Availability. The Server Name is hyper-linked. By clicking on the hyper-link, you will access the Server Name details page.

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2.8 Creating Accounts

The Account Screen is used to organize emails into business areas. For example, if you are in the insurance business, you might create an account for automobile, claims, medical, sales, and customer support, thus representing each area in your insurance business.

In order to respond to incoming emails, eMC agents are assigned to one or more email accounts.

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Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click the **Administration** sub tab.

You will see the menu items and the Server Group screen.

3. Click on the **Account** sub menu item.

You will see the Account screen. You can create a new entry or update an existing one:

- To create a new entry, click on the **Create** button, and enter the values for the required fields, and click **Create** again.
- To update an existing entry, click on the entry name provided as a hyper-link, update the required fields, and click **Update**.
- To remove an existing entry, click on the check box in the Remove column, and click on **Update**.

You can use the Account screen to remove, update or create the email account name, domain, profile, OES database server, language, reply-to, sender name, and enable or disable the customized processing flow.

The **Email Account** is hyper-linked. By clicking on the hyper-link, you will access the **Account Details** page.

When an email account is created in eMC, an inbox is created for that account in the Oracle Email Server. Additionally, the following system folders are created for that account:

- **Retry:** All emails that cannot be successfully processed by eMC are stored in this folder.
- **Admin:** All emails that fail to be delivered after the retry attempt are stored in **this folder**.
- **Unclassified:** All emails that do not satisfy any of the classification rules defined for that particular account are stored in this folder.
- **Resolved:** All incoming emails are stored in this folder, after they have been responded.
- **Deleted:** All incoming emails that are deleted are stored in this folder.
- **Sent:** A copy of all outgoing messages are stored in this folder.

Note: When you remove an account from the Account screen, the email account is deleted from the eMC schema but remains in the Oracle Email Server.

To delete the account from the Oracle Email Server, refer to the *Oracle Email Server* document.

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2.9 Creating Employees with HRMS

Use this procedure to create employees with the Oracle Human Resources Management System.

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Prerequisites

To perform the following steps, you must have Oracle HRMS installed and configured. If you do not have Oracle Human Resources Management System installed, you will need to create the employee using the Oracle Resource Manager application.

Steps

1. From the Forms application login screen, login using the default system administrator user name and password.

2. From the list of application responsibilities, select *US HRMS Manager*.

The Navigator-HRMS Manager screen appears, displaying a list of functions.

3. From the list of functions, double-click **People**.

4. Double-click **Enter and Maintain**.

The *Find Person* screen appears.

5. In the *Find Person* screen, click **New**.

The *People* form appears.

6. On the form, enter all information in required fields, for example:

Last - (name)

First - (name)

Title - (select from the drop-down list)

Type - (select from the drop-down field)

Employee Number

Birth Date

Social Security Number (for US version only)

7. Save the record to complete the process of creating an employee.

References

For more information and detailed steps on creating employees, refer to the Oracle HRMS/Payroll documentation.

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2.10 Creating an Application User and Assigning Responsibilities

Use this procedure to create application users and assign responsibilities. **If the employee exists, you do not need to perform this step.**

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Prerequisites

To perform the following steps, you must have Oracle HRMS installed and configured. If you do not have Oracle Human Resources Management System installed, you will need to create the employee using the Oracle Resource Manager application.

Steps

1. Select *File* and switch responsibility to *System Administrator*.
2. In the *Functions* tab, navigate to *Security > User > Define*.
3. Enter the *User Name* and *Password*.
4. In the *Person* field, select the name of the person that you created in HRMS.
5. Select the appropriate eMail Center Responsibility or Responsibilities.
6. Click **Save**.
7. Repeat steps 1 through 6 for each user and each responsibility.

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[Return to eMC User Interface Overview.](#)

2.11 Setting CRM Resources

The steps should be performed to set CRM Resources for users with SSS and Stand Alone Agent responsibilities.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

To perform the following steps, you must have Oracle HRMS installed and configured. If you do not have Oracle Human Resources Management System

installed, you will need to create the employee using the Oracle Resource Manager application.

Steps

1. From the Navigator System Administrator screen, click **File**, then switch responsibility.

2. Select the *CRM Resource Managers* responsibility.

A screen appears, displaying a list of functions.

3. Double-click **Maintain Resources**.

4. Double-click **Import Resources**.

The Selection Criteria screen appears.

5. From the *Resource Category* field, select *Employee*.

6. From the *Name* field, select the new employee's name.

7. Click **Search**.

The Search Results list appears, displaying a row of data with *Category* set to *Employee* and *Name* set to the new employee's name.

8. Click **Create Resource**.

The Default Values screen appears.

9. Click **OK**.

The Selected Resource screen appears.

10. In the *Selected Resources* screen, click **Save Resource**.

11. Click **Details**.

The Resource screen appears.

For users with the eMail Center Stand Alone Agent Responsibility assigned:

Select *iCenter* from the drop-down list for *Role Type* and select *eMail Center Agent* from the drop-down list for *Roles*.

For users with the eMail Center Self Service Setup Responsibility assigned:

Select *Marketing Encyclopedia* from the drop-down list for *Role Type* and select *MES Administrator* from the drop-down list for *Roles*.

12. Accept the default values on the remaining tabs.

13. From the *File* menu, click **Save** to save the resource.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.12 Creating Classifications

Classifications are user-defined categories or queues in which emails are placed, depending on their properties and content. The Classifications Screen enables the user to create and maintain classifications, their rules, and account associations.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.

2. Click on **Administration**.

3. Click on **Classification**.

The Classifications screen is displayed.

4. Click on **Create**.

The Create Classification screen is displayed.

5. Enter the Classification Name and Description.

6. Select the Rule Chaining operator from the drop down list.

For any classification, all rules can be chained using either the AND or the OR operators, but not both.

7. Enter one or more rules by selecting a Key and the corresponding Operator from the drop down list.

8. Enter a value.

A date or time picker is provided if the key selected is of the type date or time.

9. Click on **Create**.

- To update an existing Classification, click on the Classification Name, which is provided as a hyper-link. The Classification Details screen will be displayed, allowing you to update the description, the rule chaining operator, and the rules.
- To remove a classification, click on a box under the Remove column, and click, **Update**. While removing a classification, the following validation checks are performed:
 - The queue for that classification should be empty.
 - Emails for that classification should not be open (read but not responded to) in any agent's inbox.

If the above are not true, the following message is displayed:

"The classification cannot be removed as these are emails in queue."

[Return to Creating a Classification.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.13 Associating Classifications to Accounts

One or more classifications must be associated to an email account, in order for incoming emails addressed to that account to be assigned to the respective queue.

[Return to Creating a Classification.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on the menu item called, **Classification**.
4. Click on **Account Association**.

The Account Association screen for classifications is displayed. This screen will also be displayed following the creation of a new classification.

5. Select an email account from the drop down list, and click **Go**.

A prioritized list of classifications previously associated with this account are displayed in a tabular format.

6. Select Classification Name and Priority from the drop down list.

The Enabled flag is checked by default.

7. Click on **Update**.

Note: A folder bearing the classification name will be created under that account on the Oracle Email Server.

Note: To remove a classification account association, click on a check box under the Remove column, and click, **Update**.

[Return to Creating a Classification.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.14 Defining a Resource Group for Email Routing

Use this procedure to configure a static group for routing.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the *Navigator System Administrator* screen, click **File** and access the *Switch Responsibility*.
2. Select the *CRM Resource Manager* responsibility.

A screen displaying a list of functions appears.

3. Double click **Maintain Resource**.

4. Double click **Groups**.

The Define Groups window appears.

5. In the *Name* field, enter a unique descriptive name of the group.

6. In the *Active Dates* area, select or enter the *Start Date*.

7. To assign agents exclusively to this group, check the *Exclusive Flag* box. (This means the agent may not be a member of any other group.)

8. Click the **Members** tab.

9. In the *Category* field, select *Employee* from the list of values.

10. In the *Number* field, select the resource number of the appropriate agent. (You can assign as many group members as you want.) The *Name* and *Operating Unit* fields are populated automatically.

11. Click the **Usages** tab.

12. In the *Usage* field, select *Call Center* from the list of values.

Note: The *Accounting Code* and *Email Address* fields are not required in email routing.

Warning: Enter an end date only if you want to terminate the group. Use extreme caution when using this feature!

13. Optionally, if you want to define this group as a sub-group of another static group, click the **Relations** tab.

14. Select the *Group Number* from the list of values in the *Group Number* field.

15. In the *Relation Type* field, select the default value *Parent Group*.

16. In the *Active Dates* area, select or enter the *Start Date*.

17. Select *File > Save*.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.15 Assigning JTF Roles

Use this procedure to assign JTF Roles fro eMC.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the *System Administrator* user name and password.
2. Select *User Name* from the *Find Users* list of values.
3. Enter a value for the user name to search.
4. Click on **Go**.

The list of Users accounts matching the selection criteria is displayed.

5. Click on the appropriate hyperlinked in the *User Name* column.

The User Details screen is displayed

6. Click on the **Roles** button.

The User-Role mapping screen is displayed.

7. Select *JTF_FM_ADMIN* from the list of *Available Roles*.
8. Click on the > button.
9. Click on **Update**.

For the user with the eMail Center Standalone Agent Responsibility assigned:

Select iCenter from the drop-down list for Role Type and select eMail Center Agent from the drop-down list for Roles.

For the user with the eMail Center Self Service Setup Responsibility assigned:

Select Marketing Encyclopedia from the drop-down list for Role Type and select MES Administrator from the drop-down list for Roles.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.16 Creating Routes

The Routes Screen enables the user to create and maintain routes, their rules, and account associations.

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

You must have at least one resource group and one email account.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on **Route**.

The Routes screen is displayed.

4. Click on **Create**.

You will see the Route Details screen.

5. Enter the Route Name and Description.
6. Select the Rule Chaining operator from the drop down list.

For any Route, all rules can be chained using either the AND or the OR operators, but not both.

7. Enter one or more rules by selecting a Key and the corresponding Operator from the drop down list.
8. Enter a value.

A date or time picker is provided if the key selected is of the type date or time.

9. Click on **Create**.

To update an existing Route, click on the Route Name, which is provided as a hyper-link. The Route Details screen will be displayed, allowing you to update the description, the rule chaining operator, and the rules.

To remove a route, click on a box under the Remove column, and click, **Update**.

[Return to Creating Routes.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.17 Associating Routes to Accounts

One or more routes must be associated to an email account, in order for incoming emails addressed to that account to be routed to the respective destination group.

[Return to Creating Routes.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on **Route**.
4. Click on **Account Association**.

The Account Association screen for routes is displayed. This screen will also be displayed following the creation of a new route.

5. Select an email account from the drop down list, and click **Go**.

A prioritized list of routes previously associated with this account are displayed in a tabular format.

6. Select Route Name, Destination Group, Default Destination Group, and Priority from the drop down list.

The Enabled flag is checked by default.

7. Click on **Update**.

To remove a route account association, click on a check box under the Remove column, and click, **Update**.

[Return to Creating Routes.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.18 Creating Intents and Keywords

Intents and keywords are automatically generated by sending sample email inquiries and sample responses to the "intent" email account.

To set up Intents and Keywords, first determine the types of questions a customer is likely to ask as well as a logical grouping for that material. Prepare a set of common questions and their responses in two emails.

For example, if a company identifies a set of 10 commonly asked questions and their responses related to Water Heating Service, "Water Heating Service" would be identified as the Intent via the subject line in the Sample Question and Response emails.

[Return to Creating Intents and Keywords.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisite

An Intent email account should exist.

Steps

1. Identify a list of Intents.

Intents are similar to categories; they group the commonly asked questions.

2. Identify a list of commonly asked questions by subject area.
3. Identify a list of responses to all commonly asked questions.
4. Compose an email to your Intent account.

For example:

To: intent@domain.com

5. Enter data in the subject line:

The Subject format is important (see eMail Center Implementation Guide for further details) and should conform to the following format:

For Queries: <Intent name><email account><Q> (e.g., <Water Heating Service><support@oracle.com><Q>).

For Responses: <Intent name><email account><R> (e.g. <Water Heating Service><support@oracle.com><R>).

Note: The extension <Q> indicates that the email contains a list of phrases or keywords that would be used in a question. The extension <R> indicates that the email contains one or more responses to a question or set of questions. The letters "Q" and "R" must be represented in CAPTIAL letters.

6. After all questions and responses have been sent to the intent account, log into eMail Center Self Service Administration console; select the Administration sub-tab, Intent sub-menu option, and verify that all intents exist.
7. Select the Keywords sub-menu option and verify that for each intent a list of keywords has been generated. If emails containing Questions and Responses were sent there will be Keywords identified with a "Q" or an "R" and a related score.

[Return to Creating Intents and Keywords.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.19 Updating an Intent

The intent screen under the SSA console should be used for updating and removing intents and associated keywords.

[Return to Creating Intents and Keywords.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on **Intent**.

The Intents screen is displayed.

4. Select an email account and click on **Go**.

A list of the intents for that account is displayed.

5. Click on the Intent Name, provided as a hyper-link.

You will see the Intent Details screen.

6. Update the required fields.

Note: If changing the email account, of which the intent is associated, ensure you select an email account with the same defined language.

7. Click on **Update**.

To remove an intent, click on a check box under the Remove column, and click, **Update**.

[Return to Email Intents and Keywords Section.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.20 Updating Keywords

The Keywords Screen provides the ability to update the keyword, its type, and score.

[Return to Creating Intents and Keywords.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on **Intent**.
4. Click on **Keyword**.

You will see the Keyword screen.

5. Select the intent from the drop down list, and click **Go**.
6. Click on the keyword name, provided as a hyper-link.

The Keyword Details screen is displayed.

7. Update the required fields.
8. Click on **Update**.

To remove a keyword, click on the check box under the Remove column, and click, **Update**.

[Return to Creating Intents and Keywords.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.21 Setting Intent Options

The following two options are provided:

1. Number of intents with pre-fetched responses -- this is the number of intents for which suggested responses will be fetched as part of the email processing. The response documents for other intents will be fetched upon request in the eMC User Interface.
2. Enable intent analysis processing -- intent processing can be enabled or disabled on an account basis. Suggested responses are not displayed for accounts for which the intent analysis is disabled. By default, intent processing is enabled for all accounts.

[Return to Creating Intents and Keywords.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

None.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on **Intent**.
4. Click on **Option**.

You will see the Options screen.

5. Update required fields.
6. Click on **Update**.

[Return to Creating Intents and Keywords.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.22 Creating a Category in MES

The MES Category Manager screen allows you to create and maintain categories.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

Administrator should have *MES Administrator* role assigned.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on **Document**.
4. Click on **Administration**.

The MES Administrator screen will be displayed.

5. Click on **Category Manager**.

The Category Manager screen appears.

6. In the provided fields, type the name of the new category and a description of it.
7. Click on **Update**.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.23 Defining a Hierarchy Among the Categories

The MES Hierarchy Manager allows you to create and maintain the hierarchies of categories.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

Administrator should have *MES Administrator* role assigned, and the categories must be created prior to defining a hierarchy among them.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.

3. Click on **Document**.

4. Click on **Administration**.

The MES Administrator screen will be displayed.

5. Click on **Hierarchy Manager**.

The Hierarchy Manager screen appears, displaying a list of child and parent categories.

6. Select the row, which displays the sub-category name under the *Name* column.

7. From the drop-down list in the *Parent Name* column for that row, select the parent category.

8. Click **Update**.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.24 Uploading Documents Into MES

The MES Publish screen allows you to upload response documents into MES under the appropriate category.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

Administrator should have *MES Administrator* role assigned, and the categories must be created.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.

2. Click on **Administration**.

3. Click on **Document**.

4. Click on **Publish**.

The Publish screen will be displayed.

5. Enter values for the following mandatory fields: Title, Author Name, and Description.
6. From the drop-down list in the Content Type field, select "Master Document" as content type.
7. Click on **Find** (next to Categories box).

The Find screen appears, displaying a list of the categories.

8. From the list, select the appropriate category. (For suggested responses, select "Email Center" category or for templates select "EMC Templates" category.)
9. Click on **Upload File**.
10. Click on **Browse** to browse through the file system.
11. From the file system, select the desired document.
12. Click on **Open**.

The entire path for the selected document is now displayed under File Name.

13. Click on **Attach File**.

Once the file has fully uploaded, the File Name appears in the uploaded files box. Also, if the response document contains one or more inline images, then please repeat steps 10 through 13 for every image file that needs to be included in the response document.

14. Click on **Finished**.

Note: For documents in a language other than English, enter a string of keywords in the Keywords box at the bottom of the screen. This string represents the content of the document and should not exceed 120 characters. The sequence of keywords is not important as no weights are assigned.

15. Click on **Publish**.

A success message will be displayed on the top of the screen in red letters.

Note: To publish another document, you must start by clicking the **Publish** sub tab again. Do not try to use (re-cycle) data entered for a previous file.

Note: To publish another document you must start by clicking Publish sub-tab again. Do not try to use (re-cycle) data entered for a previous file.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.25 Verifying the Document Uploaded Successfully

MES provides a Category Screen for displaying categories, the documents in each category, and viewing documents.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

Administrator should have *MES Administrator* role assigned, and the documents must be published.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password.
2. Click on **Administration**.
3. Click on **Document**.

The Categories screen will be displayed.

4. Click on the desired category name.

The name of the suggested response documents and their descriptions should be displayed.

5. Click on the name of the file and the contents of the document should be displayed in a separate pop-up window.

[Return to Create MES.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.26 Deleting Published Documents

The MES My Channel option enable you to update the details (e.g., title, author, description, and category) associated with a response document ore remove a response document.

You can only delete documents that you published. You cannot delete documents that have been published by other user names.

[Return to Deleting Published Documents.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

Administrator should have *MES Administrator* role assigned, and the documents must be published.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password that was used to publish the document.
2. Click on **Administration**.
3. Click on **Document**.
4. Click on **My Channel**.
5. Click on **View My Published Items**.
6. Select the check box next to the document you want to delete.
7. Click on **Update**.

[Return to Deleting Published Documents.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.27 Creating a Query

Use this procedure to create a query before associating it with a document.

[Return to Creating a Query.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

Prerequisites

Administrator should have the *JTF_FM_ADMIN* role assigned, and the documents must be published.

Note: Merge Fields are case sensitive and should be referred to exactly the same as they were obtained from the query.

Steps

1. From the HTML application login screen, log in using the eMC Self Service Administrator user name and password that was used to publish the document.

2. Click on the **Query** sub tab.

The Query screen is displayed.

3. Click on **Create**.

You will see the Create Query screen.

4. Populate the fields.

Note: The name and number of fields in the Select clause should equal the merge fields in the document. Do not end the query with a semicolon (;) or forward slash (/). Use the standard SQL syntax to execute the query.

5. Click on **Update**.

[Return to Creating a Query.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)

2.28 Associating a Document and a Query

To associate a document and a query, you will need the Document ID and the Query ID.

To obtain the document ID, run the following SELECT statement in SQL*Plus:

```
SELECT ITEM_ID  
FROM JTF_AMV_ITEMS_TL  
WHERE ITEM_NAME = 'DOCUMENT_TITLE';
```

(Where DOCUMENT_TITLE is the title of the suggested response document you uploaded in MES).

To obtain the query ID, go to the Query sub tab, click on the desired query name, which is hyper-linked, and make a note of the Query Identifier.

To associate a document with a query, execute an INSERT statement in SQL*Plus statement, like the statement shown below:

```
INSERT INTO JTF_FM_QUERY_MES  
VALUES (DOCUMENT_ID, QUERY_ID, SYSDATE, USER_ID, SYSDATE,  
USER_ID, NULL, NULL, NULL);
```

SYSDATE is a system variable provided by SQL*Plus that always has the value of the current system date.

USER_ID is the user ID for the account you used to log in, e.g., 11001.

NULL values are inserted in the final three columns since they are not related to our product.

[Return to Creating a Query.](#)

[Return to Self Service Administration Console Overview.](#)

[Return to eMC User Interface Overview.](#)