Oracle® Applications

Interaction Center Implementation Guide

Release 11*i*

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Oracle Applications Interaction Center Implementation Guide, Release 11*i*

Part No. A95158-01

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Oracle Applications Interaction Center Implementation Guide, Release 11*i*

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If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Postal service:
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  Oracle Interaction Center Documentation
  196 Van Buren Street, Suite 200
  Herndon, VA 20170
  USA

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11i of the Oracle Applications Interaction Center Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Interaction Center

  If you have never used Oracle Interaction Center, Oracle suggests you attend one or more of the Interaction Center training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Interaction Center.

Chapter 1, "Introduction", describes the components of the Interaction Center product family and the key features of Oracle Interaction Center. This chapter also lists any new or obsolete features in this release.

Chapter 2, "Technology, Requirements, and Performance", describes the technology stack for Oracle Interaction Center and the Oracle Interaction Center architecture. This chapter also lists the minimum hardware and software configuration for Oracle Interaction Center.

Chapter 3, "Dependency Requirements and Verification", describes applications that are required for Oracle Interaction Center to function or that provide addtional functionality.

Chapter 4, "Implementation Overview", describes the implementation process and lists the implementation steps.

Chapter 5, "Implementation Tasks", provides task-based procedures for implementing Oracle Interaction Center.

Chapter 6, "Verifying the Implementation", provides task-based procedures for verifying that the impementation of Oracle Interaction Center is successful.

Chapter 7, "Diagnostics and Troubleshooting", describes how to troubleshoot the implementation of Oracle Interaction Center.

Appendix A, "Oracle Interaction Center Implementation Worksheets", provides worksheets for recording implementation decisions.

Appendix B, "Oracle Interaction Center Server Parameters", lists database server parameters for Oracle Interaction Center.

Appendix C, "Oracle Interaction Center Command Line Parameters", lists command line server parameters for Oracle Interaction Center

Documentation Accessibility

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

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The

conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Interaction Center.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Interaction Center shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Interaction Center.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Interaction Center (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing"Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Universal Work Queue Concepts and Procedures

Use this guide to administer and user Oracle Universal Work Queue.

Oracle Applications Interaction Center Implementation Guide

Use this guide to implement Interaction Center Server Manager.

Oracle Advanced Inbound Implementation Guide

Use this guide to implement inbound media for an interaction center.

Oracle Advanced Outbound Implementation Guide

Use this guide to implement outbound media for an interaction center.

Oracle Scripting Implementation Guide

Use this guide to implement Oracle Scripting.

Oracle eMail Center Implementation Guide

Use this guide to implement Oracle eMail Center.

Oracle Interaction Center Intelligence Implementation Guide

Use this guide to implement Oracle Interaction Center Intelligence.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using

Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Interaction Center and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Interaction Center working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with

expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to

track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1 Introduction

Topics include:

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.2, "Interaction Center Server Manager Overview"
- Section 1.3, "New in this Release"
- Section 1.4, "Obsolete in this Release"

1.1 Oracle Interaction Center Overview

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

Oracle Interaction Center is one of several applications in the Oracle Interaction Center. The Oracle Interaction Center is a suite of applications that supports the management and processing of customer relationship activity across all channels of customer contact.

The Oracle Interaction Center suite includes:

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

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

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

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

See Also

- Section 1.2, "Interaction Center Server Manager Overview"
- Section 1.3, "New in this Release"
- Section 1.4, "Obsolete in this Release"

1.2 Interaction Center Server Manager Overview

Interaction Center Server Manager is a new Java server process that starts, stops, and monitors interaction center server processes. It is required to run any interaction center servers.

See Also

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.3, "New in this Release"
- Section 1.4, "Obsolete in this Release"

1.2.1 Oracle Interaction Center Features

Interaction Center Server Manager features include:

- Server process control including startup and shutdown
- Server process status monitoring including status, logs files, and trace files
- Scalability using multiple nodes

1.3 New in this Release

Topics include:

- Section 1.3.1, "Interaction Center Server Manager"

- Section 1.3.2, "Interaction Queuing and Distribution Server"
- Section 1.3.3, "Multi-Site Interaction Centers"
- Section 1.3.4, "HTML Server Group Administration"
- Section 1.3.5, "HTML Call Center Administration"

See Also

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.2, "Interaction Center Server Manager Overview"
- Section 1.4, "Obsolete in this Release"

1.3.1 Interaction Center Server Manager

Interaction Center Server Manager is responsible for starting, stopping and monitoring interaction center server processes. Only Interaction Center Server Manager is installed on the target machine. All batch and script files from previous releases can be discarded.

1.3.2 Interaction Queuing and Distribution Server

Interaction Queuing and Distribution server stores all inbound items and their routing information in queues and distributes them to agents. It integrates with Routing and Interaction Blending. Interaction Queueing and Distribution server is required in all Advanced Inbound and Advanced Outbound implementations.

A typical single site installation of Advanced Inbound consists of:

- one Oracle Call Center Connectors
- one Oracle Inbound Telephony Server
- one Oracle Interaction Queue and Distribution server
- one or more Oracle Telephony Manager server
- one or more Oracle Universal Work Queue server
- one or more Oracle Routing server

1.3.3 Multi-Site Interaction Centers

A multi-site interaction center includes a global server group and multiple local server groups. The global server group controls queueing, distribution, and routing for the local server groups.

Call routing and call-and-data transfer for multi-site interaction centers is currently supported for Avaya Definity and Nortel Meridian with Intel CT-Connect Enterprise Edition v5.0 + Service Pack 3 only.

A global site in a multi-site interaction center typically consists of:

- one Interaction Queue and Distribution server
- *one* Routing server

A local site in a multi-site interaction center typically consists of:

- one Inbound Telephony Server
- one or more Telephony Manager servers
- one or more Universal Work Queue servers

1.3.4 HTML Server Group Administration

Server groups and server processes are now administered using an HTML interface. Use the Call Center HTML Administration or Interaction Center Server Manager responsibility.

1.3.5 HTML Call Center Administration

Call center administration activities, including routing and call classification, are now administered using an HTML interface. Use the Call Center HTML Administration responsibility.

1.4 Obsolete in this Release

Topics include:

- Section 1.4.5, "Server Monitor and Server Launcher"
- Section 1.4.6, "Telephony Media Controller Server"

See Also

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.2, "Interaction Center Server Manager Overview"
- Section 1.3, "New in this Release"

1.4.1 Call Center Administration (Forms)

Call Center administration, including routing and call classification, using Oracle Forms is no longer supported. These interaction center activities are now administered using an HTML interface. Use the Call Center HTML Administration responsibility.

1.4.2 Server Locator Administration (Forms)

Interaction center server group administration using Oracle Forms is no longer supported. Server groups and server processes are now administered using an HTML interface. Use the Call Center HTML Administration or Interaction Center Server Manager responsibility.

1.4.3 Call Center Applications Setup CD

The Call Center Applications Setup CD is obsolete. The Call Center Applications Setup D can be discarded.

You may safely delete all batch files and shell scripts installed by the Call Center Applications Setup CD.

1.4.4 Standalone/Distributed Mode

Standalone and distributed modes are no longer relevant. The concepts are now changed and will be called single -site and multi-site installations.

1.4.5 Server Monitor and Server Launcher

Server Monitor and Server Launcher are now obsolete. They have been replaced by Interaction Center Server Manager.

1.4.6 Telephony Media Controller Server

Telephony Media Controller server is now obsolete.The functionality in Telephony Media Controller server is now in Telephony Manager server.

2

Technology, Requirements, and Performance

Topics include:

2.1 Architectural Overview

Interaction Center Server Manager is a set of shell scripts and batch files that start, stop, and monitor the server processes in an interaction center server group. Interaction Center Server Manager is installed on any target machine and is controlled at the command line. The server processes assigned to a target machine are controlled by an HTML administration interface in Oracle Applications.

Topics include:

2.1.1 Single-Site Interaction Center

The servers are logically grouped together in a server group. The servers communicate with server in the same server group only. Some of the servers can be replicated or distributed across multiple machines to support better scalability. For example, the computer-telephony integration work load can be shared among several Telephony Manager servers.

A typical single site server configuration consists of:

- one PBX and middleware

- one Call Center Connectors server
- one Inbound Telephony server
- one Interaction Queuing and Distribution server
- one or more Routing servers
- one or more Telephony Manager servers
- one or more Universal Work Queue server

The configuration is the same whether routing is controlled by the switch (passive) or the Routing server (active).

2.1.2 Multi-Site Interaction Centers

A multi-site server configuration include a global server group and several local server groups. The local server groups are associated with the global server group.

A global server group is configured with the following servers:

- one Interaction Queuing and Distribution Server
- one or more Routing Server

Each local server group consists of:

- one PBX and middleware
- one Call Center Connector server
- one Inbound Telephony server
- one or more Telephony Manager servers
- one or more Universal Work Queue servers

The configuration is the same whether routing is controlled by the switch (passive) or the Routing server (active).

2.2 Minimum Software Requirements

Topics include:

- Section 2.2.1, "Oracle Applications, Release 11i"
- Section 2.2.2, "Java Development Kit (JDK) or Java Runtime Environment (JRE)"
- Section 2.2.3, "Database Connectivity File"

2.2.1 Oracle Applications, Release 11i

Install or upgrade Oracle Applications, Release 11*i*. Interaction Center Server Manager files are downloaded from Oracle Applications.

The Oracle Applications Rapid Install installs a complete set of Oracle Applications products at the latest available maintenance pack level. It installs the required technology stack components, creates the Oracle Applications database, and installs the Oracle Applications file system components. For more information, see *Installing Oracle Applications, Release 11i*.

Ensure that the target machine can access the most recent Oracle Applications apps.zip and jdbc111.zip files. The Oracle Applications apps.zip file contains the functionality for the interaction center servers. The Oracle Applications jdbc111.zip file contains Java database connectivity information. These files are typically found in the JAVA_TOP directory that was created during the installation of Oracle Applications.

You have the following options:

- Create a network file system link to the apps.zip and jdbc111.zip files on the Oracle Applications server to which patches are most often applied, such as the Administration Server. The format of the path to the files will depend on how the network file system is set up. For information specific to your enterprise, please contact your system administrator.

  This configuration makes patches to the Oracle Applications apps.zip or jdbc111.zip files immediately available to the target machine. However, system processing is slower.

- Copy the Oracle Applications apps.zip and jdbc111.zip files from an Oracle Applications server to the target machine (either manually or by performing a web tier installation of Oracle Applications).

  This configuration is faster. However, patches to the Oracle Applications apps.zip or jdbc111.zip files on the Oracle Applications servers are not immediately available to the target machine.

2.2.2 Java Development Kit (JDK) or Java Runtime Environment (JRE)

The Java Development Kit (JDK) or Java Runtime Environment (JRE) provide the Java virtual machine in which Interaction Center Server Manager runs. Interaction Center Server Manager and a Java Runtime Environment (JRE) are installed during a rapid installation of the Oracle Applications web server.

If you intend to use additional target machines, ensure that JDK or JRE is installed on the target machine. You can use the following JDK/JRE versions to run Interaction Center Server Manager:

- 1.3.1
- 1.3.0
- 1.2.2
- 1.1.8

> **Note:** If you run Interaction Center Server Manager using JDK.JRE 1.1.8, please edit the ieoenv file. Put the jdbc111.zip before jdbc12.zip in the classpath. This is required for correct functioning or interaction center server processes.

You have the following options:

- Perform a web tier installation of Oracle Applications on the target machine.
- Obtain and install JDK or JRE manually on the target machine.

  You can download JDK/JRE from Sun or the hardware vendor. You should perform all necessary operating system tuning for the specific platform. For example, on HP it is required that the operating system kernel parameter max_proc_thread be raised from the default value of 64 to at least 1024. Please contact your hardware vendor for additional information.

2.2.3 Database Connectivity File

Create a database connectivity file (for example, *.dbc) on the target machine. The database connectivity file is a text file that contains the connection parameters for the Oracle Applications database.

The following table lists the necessary connection parameters for the database connectivity file. If you do not know the appropriate values, then contact your Oracle Applications system administrator or database administrator.

Parameter	Description
TWO_TASK	The name of the database or the SID.
FNDNAM	The default value is 'apps.' Do not change this value.

Parameter	Description
GWYUID	The gateway userid and password.
FND_MAX_JDBC_CONNECTIONS	The default value is '20.' Do not change this value.
GUEST_USER_PWD	An Oracle Applications database guest userid and password.
APPS_JDBC_DRIVER_TYPE	The default value is 'THIN.' Do not change this value.
DB_HOST	The name of the host machine for the Oracle Applications database.
DB_PORT	The listener port number for the Oracle Applications database. The Oracle database client on the target machine communicates with the Oracle Applications database using this port number.

The following is an example of a DBC file:

```
#DB Settings
#10OCT2001
TWO_TASK=dbsid
FNDNAM=apps
GWYUID=applsyspub/pub
GUEST_USER_PWD=userid/password
APPS_JDBC_DRIVER_TYPE=THIN
DB_HOST=machinename.us.oracle.com
DB_PORT=1527
```

2.3 Minimum Hardware Requirements

Topics include:

- Section 2.3.1, "Static IP Address"

2.3.1 Static IP Address

The target machine must have a static IP address to run ICSM. Use the following procedure to identify the IP address of the target machine.

1. Choose **Start** > **Settings** > **Control Panel**.
2. Double-click **Network**.
3. In the Protocols tab, click TCP/IP Protocol and then click **Properties**.
4. Under Specify an IP address, note the IP Address.

If an IP address is not configured, please contact your network administrator.

2.4 Scalability and Performance Guidelines

This document describes the memory requirement of Interaction Center Server processes.

2.4.1 Introduction

Interaction Center Server processes are Java processes that can be configured to run with certain amount of allocated memory. Each server process has its required memory allocation to be functional. The memory allocation for a Java process is specified by the Java command line -ms and -mx options, which define the minimum and maximun amount of memory allocated.

ICSM stores this information in the database as seed data for each server type such that each server would have the default amount of memory allocated when the server is run.

2.4.2 Default Memory Settings

The following table defines the default memory allocated for each server type. The minimum memory required is the memory that the Java Virtual Machine will allocate upfront when the process is started. The maximum memory required is the upper bound of the memory allocation that the Java Virtual Machine can grow.

Server Type	Default Memory Settings (Minimum / Maximum)	Default Java Option
Unviersal Work Queue Server	64M / 128M	-ms64m -mx128m
Interaction Queuing and Distribution Server	128M / 256M-	ms128M -mx256M
Interaction Blending Server	16M / 32M	-ms16M -mx32M
Routing Server	16M / 32M	-ms16M -mx32M
Oracle Telephony Manager	128M / 256M	-ms128M -mx256M

Server Type	Default Memory Settings (Minimum / Maximum)	Default Java Option
Inbound Telephony Server	16M / 32M	-ms16M -mx32M
Switch Simulator	64M / 128M	-ms64M -mx128M
Advanced Outbound Central Server	128M / 256M	-ms128m -mx256M
Advanced Outbound Dial Server	128M / 256M	-ms128m -mx256m

2.4.3 Minimum Memory Requirement Calculation

You should always use the maximum value to calculate the amount of physical memory needed for the machine running interaction center servers.

For example, a typical call center running Advanced Inbound will have 1 OTM , 1 UWQ , 1 ITS , 1 IQD , 1 Routing server; thus, the memory required to run all the servers will be : 256 + 128 + 32 + 256 + 32 = 704 MB. Therefore, without tuning the memory allocations, a machine with at least 768MB physical memory must be used to run all of the above server processes without having unpredictable OutOfMemory errors.

2.4.4 Tuning memory allocation

The memory allocation for each server instance can be changed by using the "Java Options" field in the Advance Tab of the Server. Use the standard -msXX and -mxYY format for specifying those options. Tune down the memory allocation only if a lightly loaded (< 50 agents) interaction center is expected. Tune up the memory allocations if a heavily loaded (> 500 agents) is expected.

3

Dependency Requirements and Verification

Topics include:

- Section 3.1, "Mandatory Dependencies"
- Section 3.2, "Conditional Dependencies"

3.1 Mandatory Dependencies

Mandatory dependencies must be implemented prior to implementing Oracle Interaction Center. They are required in order for Oracle Interaction Center to function.

The following mandatory dependencies apply to Oracle Interaction Center:

- Oracle CRM Foundation

See Also

- Section 3.2, "Conditional Dependencies"

3.2 Conditional Dependencies

Conditional dependencies provide desired functionality to Oracle Interaction Center but are not required for Oracle Interaction Center to function.

The following conditional dependencies apply to Oracle Interaction Center:

- Oracle TeleSales
- Oracle TeleService

See Also

- Section 3.1, "Mandatory Dependencies"

4

Implementation Overview

4.1 Process Description

Interaction Center Server Manager can be installed in the following ways:

- Perform a web tier installation of Oracle Applications
- Manually install Interaction Center Server Manager

Web Tier Rapid Install

Interaction Center Server Manager files, the Java Runtime Environment (JRE), and the apps.zip and jdbc111.zip files are installed during the web tier installation of Oracle Applications. Interaction Center Server Manager files are installed to <common_top>\admin\scripts (Windows NT) or <common_top>\admin\scripts (Unix). On Windows NT, a service named "Oracle ICSM hostname" is registered.

There are no manual steps required with this type installation. However, this installation does require more disk space. The installation of any Oracle Applications server from a Rapid Install, even the web tier, will install the Oracle Application file system components. The web server code is not required to run Interaction Center Server Manager. Additionally, if there are multiple target machines, any patches to the Oracle Applications apps.zip or jdbc111.zip files will also have to be applied to every target machine using local copies of apps.zip and jdbc111.zip.

Manual Install

Manual installation involves:

- manually installing Interaction Center Server Manager
- manually installing Java Development Kit or Java Runtime Environment

- (Windows NT) registering Interaction Center Server Manager as a service
- manually creating a database connectivity file
- manually creating an Interaction Center Server Manager environment file
- linking to the apps.zip and jdbc111.zip files on the Oracle Applications server to which patches are most often applied

This type of installation does not require a lot of disk space. Most importantly, patches to the Oracle Applications apps.zip or jdbc111.zip files are immediately available to the target machine. However, this type of installation does involve manual setup.

See Also

Section 4.2, "Implementation Task Sequence"

4.2 Implementation Task Sequence

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

1. Downloading Interaction Center Server Manager Files
2. Creating an Environment File for the Interaction Center Server Manager Node
3. Registering Interaction Center Server Manager as an NT Service
4. Starting the Interaction Center Server Manager Node
5. Verifying the Interaction Center Server Manager Node
6. Creating a Single-Site Interaction Center or Creating a Multi-Site Interaction Center

See Also

Section 4.1, "Process Description"

5

Implementation Tasks

Topics include:

5.1 Defining an Administrator for Oracle Interaction Center

Use the following procedure to define an administrator for an Oracle interaction center.

Login

Self-Service Login URL

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.

Steps

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

   The User window appears.

   Use the following guidelines to define Oracle Applications usernames:

   - Use only one word.
   - Use only alphanumeric characters ('A' through 'Z', and '0' through '9').
   - Use only the set of characters that your operating system supports for filenames.

2. In the User Name field, enter the name of the user.

   The password is temporary. When the user signs on to Oracle Applications for the first time, the message "Your password has expired" appears and the user is prompted to set a new password.

   Use the following guidelines to define Oracle Applications passwords:

   - Use at least five characters and no more than 100 characters.
   - Use only alphanumeric characters ('A' through 'Z', and '0' through '9').

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

   The cursor remains in the Password field.

4. Enter the password again to verify it.

5. In the Responsibilities tab, add the following responsibility:

Responsibility	Function	Type
System Administrator	Create user accounts.	Self-Service
HRMS Manager, for example US HRMS Manager (if Oracle Human Resource Management System is installed)	Create an employee.	Self-Service
CRM Resource Manager	Create a CRM resource.	Self-Service
Call Center HTML Administrator	Administer an interaction center.	HTML

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

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

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

   You may close the Users window.

See Also

- Section 5.2, "Implementing an Interaction Center Server Manager Node"
- Section 5.3, "Administering an Interaction Center Server Manager Node"
- Section 5.4, "Implementing a Single-Site Interaction Center"
- Section 5.5, "Implementing a Multi-Site Interaction Center"
- Section 5.6, "Administering an Interaction Center"
- Section 5.7, "Creating an Interaction Center Agent"

5.2 Implementing an Interaction Center Server Manager Node

Perform the steps in the following table to implement an Interaction Center Server Manager. The Number column indicates the step order. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Responsibility column indicates the Oracle Applications user account responsibility required to complete the step.

If you have defined an administrator for an Oracle interaction center, then that user has all of the responsibilities necessary to implement an Interaction Center Manager node. See Section 5.1, "Defining an Administrator for Oracle Interaction Center".

Number	Required?	Description	Responsibility
❑ Step 1	Required	**Download the Interaction Center Server Manager files to the target machine.** See: Section 5.2.1, "Downloading Interaction Center Server Manager Files"	Call Center HTML Administration

Number	Required?	Description	Responsibility
❑ Step 2	Required	**Create and download a configured environment file to the target machine.** See: Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node"	Call Center HTML Administration
❑ Step 3	Required (NT only)	**Register Interaction Center Server Manager as an NT service.** See: Section 5.2.3, "Registering Interaction Center Server Manager as an NT Service"	Not Applicable
❑ Step 4	Required	**Start the Interaction Center Server Manager node.** See: Section 5.2.4, "Starting the Interaction Center Server Manager Node"	Not Applicable
❑ Step 5	Required	**Verify the Interaction Center Server Manager node in Oracle Applications.** See: Section 5.2.5, "Verifying the Interaction Center Server Manager Node"	Call Center HTML Administration

See Also

- Section 5.1, "Defining an Administrator for Oracle Interaction Center"
- Section 5.3, "Administering an Interaction Center Server Manager Node"
- Section 5.4, "Implementing a Single-Site Interaction Center"
- Section 5.5, "Implementing a Multi-Site Interaction Center"
- Section 5.6, "Administering an Interaction Center"
- Section 5.7, "Creating an Interaction Center Agent"

5.2.1 Downloading Interaction Center Server Manager Files

> **Note:** During installation of the Oracle Applications web tier, Interaction Center Server Manager files are installed to <common_top>\admin\scripts (Windows NT) or <common_top>\admin\scripts (Unix). If you intend to use the web tier machine as the Interaction Center Server Manager node or if you have installed the Oracle Applications web tier on an additional target machine, then you do not have to download the Interaction Center Server Manager files. You may skip this step.
>
> For information about the installing Interaction Center Server Manager using the web tier installation of Oracle Applications, see Section 4.1, "Process Description".

Use the following procedure to download the files for Interaction Center Server Manager from Oracle Applications.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Select the ICSM tab.
2. Click **Setup**.
3. In the Download and Install section, download the Interaction Center Server Manager .zip file for your operating system.

Note: You can also download the Interaction Center Server Manager .zip files directly from your Oracle Applications web server (Rapid Install only).

Use the following URLs:

/OA_HTML/download/ieo/ieoicsmnt.zip

/OA_HTML/download/ieo/ieoicsmunix.zip

4. On the target machine, extract the .zip file.

Guidelines

The Interaction Center Server Manager .zip file for Windows NT contains the following files:

File	Description
\admin\scripts\ieoicsm.cmd	This command file is used to start or stop an Interaction Center Server Manager Windows NT service, start or stop Interaction Center Server Manager in console mode, or start the Interaction Center Server Manager command line utility.
\admin\scripts\ieonticsm.cmd	This command file is used to register or unregister Interaction Center Server Manager as a Windows NT service.
\admin\scripts\ieoenv.cmd	This command files is used to set up the environment variables for Interaction Center Server Manager.
\admin\scripts\ieosvicsm.cmd	This command file is used by Oracle Rapid Install, if applicable, during installation and deinstallation.
\util\OamkSvc.exe	This program is used to register or unregister Interaction Center Server Manager as a Windows NT service.

The Interaction Center Server Manager .zip file for Unix contains the following files:

File	Description
/admin/scripts/ieoicsm.sh	This command file is used to start or stop an Interaction Center Server Manager Windows NT service, start or stop Interaction Center Server Manager in console mode, or start the Interaction Center Server Manager command line utility.

File	Description
/admin/scripts/ieoenv.sh	This command files is used to set up the environment variables for Interaction Center Server Manager.
/admin/scripts/ieosvicsm.sh	This command file is used by Oracle Rapid Install, if applicable, during installation and deinstallation.
/util/OamkSvc.exe	This program is used to register or unregister Interaction Center Server Manager as a Windows NT service.

See Also

- Section 5.2.1, "Downloading Interaction Center Server Manager Files"
- Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node"
- Section 5.2.3, "Registering Interaction Center Server Manager as an NT Service"
- Section 5.2.4, "Starting the Interaction Center Server Manager Node"
- Section 5.2.5, "Verifying the Interaction Center Server Manager Node"

5.2.2 Creating an Environment File for the Interaction Center Server Manager Node

Note: During installation of the Oracle Applications web tier, Interaction Center Server Manager environment file is configured automatically. If you intend to use the web tier machine as the Interaction Center Server Manager node or if you have installed the Oracle Applications web tier on an additional target machine, then you do not have to create an environment file. You may skip this step.

For information about the installing Interaction Center Server Manager using the web tier installation of Oracle Applications, see Section 4.1, "Process Description".

Use the following procedure to generate and download an Interaction Center Server Manager environment file from Oracle Applications.

Note: After the environment file has been installed or downloaded, you can directly edit the environment file (ieoenv.cmd for Windows NT or ieoenv.sh for Unix).

For information about modifying the environment file, see Section 5.3.3, "Modifying an Environment File for an Interaction Center Server Manager Node".

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Select the ICSM tab.
1. Click **Setup**.
2. In the Generate Environment File section, enter the values for the environment variables.

   The following table describes the environment variables.

Variable	Description
IEO_COMM_TOP	The directory to which the Interaction Center Server Manager .zip file was extracted.
IEO_DBC_FILE	The absolute path to the database connectivity file. You can use the Browse button to locate the file.
IEO_JRE	The absolute path to the Java Development Kit executable (java.exe) file or Java Runtime Environment executable (jre.exe) file. You can use the Browse button to locate the file.

Variable	Description
IEO_JAVA_TOP	The directory that contains both the apps.zip and jdbc111.zip files. If you have created a link to files on an Oracle Applications server: ■ use the UNC format for the network path (Windows NT) or the symbolic link (Unix). ■ if the node and the Oracle Applications server are not on the same domain, then include the domain suffix.
IEO_IP	The IP address of the machine that will run Interaction Center Server Manager.
IEO_HOST	The name of the machine that will run Interaction Center Server Manager. This variable is use to create the name for the Windows NT service (Oracle ICSM <IEO_HOST>).

3. Select the platform.
4. Click **download environment file**.

   The contents of the generated environment file are displayed in your browser.
5. Choose **File** > **Save As** and save the environment file as ieoenv.cmd in the <IEO_COMM_TOP>\admin\scripts directory.

   Note: This overwrites the default environment file that was installed with the Oracle Applications web-tier or extracted from the .zip file.
6. If necessary, modify the environment file.

   If you are using Java Development Kit or Java Runtime Environment 1.1.8, you must move the line:

   ```
   set CLASSPATH=%CLASSPATH%;%IEO_JAVA_TOP%\jdbc111.zip
   ```

   before the line:

   ```
   set CLASSPATH=%CLASSPATH%;%IEO_JAVA_TOP%\jdbc12.zip
   ```

   An example of an environment file is provided below.

Guidelines

The following is an example of an Interaction Center Server Manager environment file for Windows NT.

```
set IEO_JRE_HOME=C:\jdk1.1.8
set IEO_DBC_FILE=D:\icsm\icsm.dbc
set IEO_JAVA_TOP=D:\oa1156\java
set IEO_JRE=C:\jdk1.1.8\bin\java.exe
set IEO_IP=138.2.67.213
set IEO_HOST=stcsmith.us.oracle.com
set IEO_COMM_TOP=D:\icsm\
set CLASSPATH=.
set CLASSPATH=%CLASSPATH%;%IEO_JAVA_TOP%\jdbc12.zip
set CLASSPATH=%CLASSPATH%;%IEO_JAVA_TOP%\jdbc111.zip
set CLASSPATH=%CLASSPATH%;%IEO_JAVA_TOP%\xmlparserv2.zip
set CLASSPATH=%CLASSPATH%;%IEO_JAVA_TOP%\apps.zip
set CLASSPATH=%CLASSPATH%;%IEO_JRE_HOME%\classes
set CLASSPATH=%CLASSPATH%;%IEO_JRE_HOME%\lib
set CLASSPATH=%CLASSPATH%;%IEO_JRE_HOME%\lib\classes.zip
set CLASSPATH=%CLASSPATH%;%IEO_JRE_HOME%\lib\classes.jar
set CLASSPATH=%CLASSPATH%;%IEO_JRE_HOME%\lib\rt.jar
set CLASSPATH=%CLASSPATH%;%IEO_JRE_HOME%\lib\i18n.jar
```

See Also

- Section 5.2.1, "Downloading Interaction Center Server Manager Files"
- Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node"
- Section 5.2.3, "Registering Interaction Center Server Manager as an NT Service"
- Section 5.2.4, "Starting the Interaction Center Server Manager Node"
- Section 5.2.5, "Verifying the Interaction Center Server Manager Node"

5.2.3 Registering Interaction Center Server Manager as an NT Service

Use the following procedure to register Interaction Center Server Manager as an NT service.

Login

Not Applicable

Responsibility

Not Applicable

Prerequisites

None

Steps

1. Open a command prompt window.

   For example, in Windows NT:

   a. Choose **Start** > **Run**.

   b. Enter **cmd**.

   c. Click **OK**.

2. Change to the scripts directory.

3. Register Interaction Center Server Manager as an NT service.

   ```
   ieonticsm register
   ```

   Note: Configure the service to log on to a Windows NT user account that has access to the network path (IEO_JAVA_TOP) that points to the apps.zip and jdbc111.zip files.

Guidelines

The following is an example of the output from the command prompt in Windows NT:

```
C:> cd D:\icsm\admin\scripts

D:\icsm\admin\scripts> ieonticsm.cmd register

D:\icsm\admin\scripts>echo off
ieo_home = ..\..
CLASSPATH = .;D:\oa1156\java\jdbc12.zip;D:\oa1156\java\jdbc111.zip;D:\oa1156\jav
a\xmlparserv2.zip;D:\oa1156\java\apps.zip;C:\jdk1.1.8\classes;C:\jdk1.1.8\lib;C:
\jdk1.1.8\lib\classes.zip;C:\jdk1.1.8\lib\classes.jar;C:\jdk1.1.8\lib\rt.jar;C:\
jdk1.1.8\lib\i18n.jar
Runnng command ..\..\util\OamkSvc.exe -si "Oracle ICSM stcsmith.us.oracle.com" -
e -a -c "C:\jdk1.1.8\bin\java.exe -ms8M -mx16M oracle.apps.ieo.icsm.server.Main
-dbc D:\icsm\icsm.dbc -home D:\icsm\\admin\scripts      "
```

```
Capture Environment - TRUE
Automatic Startup   - TRUE
Set dependency on   - None
Startup username    - None
Program launched    - C:\jdk1.1.8\bin\java.exe -ms8M -mx16M oracle.apps.ieo.icsm
.server.Main -dbc D:\icsm\icsm.dbc -home D:\icsm\\admin\scripts
Program to kill     - None
Terminate All       - FALSE


Service "Oracle ICSM stcsmith.us.oracle.com" successfully created. Environment r
ecorded in oaMkSvc.log.
 Change service parameters from ControlPanel.

ieonticsm.cmd exiting with status 1
```

See Also

- Section 5.2.1, "Downloading Interaction Center Server Manager Files"
- Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node"
- Section 5.2.3, "Registering Interaction Center Server Manager as an NT Service"
- Section 5.2.4, "Starting the Interaction Center Server Manager Node"
- Section 5.2.5, "Verifying the Interaction Center Server Manager Node"

5.2.4 Starting the Interaction Center Server Manager Node

The Interaction Center Server Manager node is started at the command line or, if registered as a Windows NT service, as a service.

Use the following procedure to start the Interaction Center Server Manager node.

Login

Not Applicable

Responsibility

Not Applicable

Prerequisites

None

Steps

1. Open a command prompt window.

   For example, in Windows NT:

   a. Choose **Start** > **Run**.

   b. Enter **cmd**.

   c. Click **OK**.

2. Change to the scripts directory.

3. Start Interaction Center Server Manager.

   For a complete list of command line parameters for Interaction Center Server Manager, see Appendix C.

- To start Interaction Center Server Manager at the command line, enter:

  ```
  ieoicsm start
  ```

- To start Interaction Center Server Manager process in console mode (Windows NT only) at the command line, enter:

  ```
  ieoicsm console_start
  ```

- To start Interaction Center Server Manger in the Windows NT Services window:

  a. Choose **Start** > **Settings** > **Control Panel**.

  b. Double-click **Services**.

     The Services window appears.

  c. Click **Oracle ICSM <machinename>**.

  d. Click **Start**.

     Windows NT attempts to start the service.

  e. Click **Close**.

Guidelines

The following is an example of the output from the command prompt in Windows NT:

```
C:> cd D:\icsm\admin\scripts

D:\icsm\admin\scripts> ieoicsm.cmd start

D:\icsm\admin\scripts>echo off
**************************
You are running ieoicsm.cmd
**************************
Tue 10/23/2001
10:03p
ieo_home = ..\..
"Starting Oracle ICSM"
The Oracle ICSM stcsmith.us.oracle.com service is starting.
The Oracle ICSM stcsmith.us.oracle.com service was started successfully.

ieoicsm.cmd exiting with status 0
```

See Also

- Section 5.2.1, "Downloading Interaction Center Server Manager Files"
- Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node"
- Section 5.2.3, "Registering Interaction Center Server Manager as an NT Service"
- Section 5.2.4, "Starting the Interaction Center Server Manager Node"
- Section 5.2.5, "Verifying the Interaction Center Server Manager Node"

5.2.5 Verifying the Interaction Center Server Manager Node

Use the following procedure to verify the implementation of an Interaction Center Server Manager node.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears. Verify that the target machine appears in the list.
3. Click the node name.

   The Node Details page appears. Verify that the status of the node is Up.

See Also

- Section 5.2.1, "Downloading Interaction Center Server Manager Files"
- Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node"
- Section 5.2.3, "Registering Interaction Center Server Manager as an NT Service"
- Section 5.2.4, "Starting the Interaction Center Server Manager Node"
- Section 5.2.5, "Verifying the Interaction Center Server Manager Node"

5.3 Administering an Interaction Center Server Manager Node

Topics include:

- Section 5.3.1, "Viewing the Status of an Interaction Center Server Manager Node"
- Section 5.3.2, "Stopping an Interaction Center Server Manager Node"
- Section 5.3.3, "Modifying an Environment File for an Interaction Center Server Manager Node"
- Section 5.3.4, "Adding an IP Address to the Node IP Address List (Multihomed Nodes)"
- Section 5.3.5, "Specifying an IP Address for a Server Process (Multihomed Nodes)"
- Section 5.3.6, "Removing an Interaction Center Server Manager Node"

See Also

- Section 5.1, "Defining an Administrator for Oracle Interaction Center"
- Section 5.2, "Implementing an Interaction Center Server Manager Node"

- Section 5.4, "Implementing a Single-Site Interaction Center"
- Section 5.5, "Implementing a Multi-Site Interaction Center"
- Section 5.6, "Administering an Interaction Center"
- Section 5.7, "Creating an Interaction Center Agent"

5.3.1 Viewing the Status of an Interaction Center Server Manager Node

Use this procedure to the view the status of an Interaction Center Server Manager node.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Interaction Center Server Manager.

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears.
3. Click a node name.

   The Node Details page appears. The status of Interaction Center Server Manager is displayed at the top of the page. The following table describes the statuses.

Status	Description
Down	Interaction Center Server Manager is not running on the target machine.
Up	Interaction Center Server Manager is running on the target machine.

See Also

- Section 5.3.2, "Stopping an Interaction Center Server Manager Node"
- Section 5.3.3, "Modifying an Environment File for an Interaction Center Server Manager Node"
- Section 5.3.4, "Adding an IP Address to the Node IP Address List (Multihomed Nodes)"
- Section 5.3.5, "Specifying an IP Address for a Server Process (Multihomed Nodes)"
- Section 5.3.6, "Removing an Interaction Center Server Manager Node"

5.3.2 Stopping an Interaction Center Server Manager Node

Use the following procedure to stop an Interaction Center Server Manager node.

Login

Not Applicable

Responsibility

Not Applicable

Prerequisites

None

Steps

1. Open a command prompt window.

   For example, in Windows NT:

   a. Choose **Start** > **Run**.

   b. Enter **cmd**.

   c. Click **OK**.

2. Change to the scripts directory.
3. Stop Interaction Center Server Manager.

   For a complete list of command line parameters for Interaction Center Server Manager, see Appendix C.

- To stop the Interaction Center Server Manager process at the command line, enter:

  ```
  ieoicsm stop
  ```

- To stop the Interaction Center Server Manager process in console mode (Windows NT only) at the command line, enter:

  ```
  ieoicsm console_stop
  ```

- To stopt Interaction Center Server Manger in the Windows NT Services window:

  a. Choose **Start** > **Settings** > **Control Panel**.

  b. Double-click **Services**.

  The Services window appears.

  c. Click **Oracle ICSM <machinename>**.

  d. Click **Stop**.

  Note: the Stop button is not available if the service is running.

  Windows NT attempts to start the service.

  e. Click **Close**.

Guidelines

The following is an example of the output from the command prompt in Windows NT:

```
C:> cd D:\icsm\admin\scripts

D:\icsm\admin\scripts> ieoicsm.cmd stop

D:\icsm\admin\scripts>echo off
**************************
You are running ieoicsm.cmd
**************************
Tue 10/23/2001
10:01p
ieo_home = ..\..
"Stopping Oracle ICSM"
```

```
The Oracle ICSM stcsmith.us.oracle.com service is stopping.
The Oracle ICSM stcsmith.us.oracle.com service was stopped successfully.

ieoicsm.cmd exiting with status 0
```

See Also

- Section 5.3.1, "Viewing the Status of an Interaction Center Server Manager Node"
- Section 5.3.3, "Modifying an Environment File for an Interaction Center Server Manager Node"
- Section 5.3.4, "Adding an IP Address to the Node IP Address List (Multihomed Nodes)"
- Section 5.3.5, "Specifying an IP Address for a Server Process (Multihomed Nodes)"
- Section 5.3.6, "Removing an Interaction Center Server Manager Node"

5.3.3 Modifying an Environment File for an Interaction Center Server Manager Node

After the environment file has been installed or downloaded, you can directly edit the environment file (ieoenv.cmd for Windows NT or ieoenv.sh for Unix).

Note: If you are using Java Development Kit or Java Runtime Environment 1.1.8, you must move the line:

```
set CLASSPATH=%CLASSPATH%;%IEO_JAVA_
TOP%\jdbc111.zip
```

before the line:

```
set CLASSPATH=%CLASSPATH%;%IEO_JAVA_
TOP%\jdbc12.zip
```

An example of an environment file is provided in Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node".

Use this procedure to modify the environment variables for an Interaction Center Server Manager node.

Login

Not Applicable

Responsibility

Not Applicable

Prerequisites

None

Steps

1. If Interaction Center Server Manager is registered as an NT service, unregister the service.

   ```
   ieonticsm unregister
   ```

2. Edit the ieoenv file.

   For information about the environment variables, see Section 5.2.2, "Creating an Environment File for the Interaction Center Server Manager Node".

3. Register the NT service.

   See Section 5.2.3, "Registering Interaction Center Server Manager as an NT Service".

See Also

- Section 5.3.1, "Viewing the Status of an Interaction Center Server Manager Node"
- Section 5.3.2, "Stopping an Interaction Center Server Manager Node"
- Section 5.3.4, "Adding an IP Address to the Node IP Address List (Multihomed Nodes)"
- Section 5.3.5, "Specifying an IP Address for a Server Process (Multihomed Nodes)"
- Section 5.3.6, "Removing an Interaction Center Server Manager Node"

5.3.4 Adding an IP Address to the Node IP Address List (Multihomed Nodes)

An Interaction Center Server Manager node may have more than one IP address. A machine with more that one IP address is known as a multihomed machine.

Interaction Center Server Manager discovers only one of those IP addresses. The remaining IP addresses must be manually added to the IP address list for the node.

Use this procedure to add additional IP addresses to the list of IP addresses for the Interaction Center Server Manager node.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Implement Interaction Center Server Manager.

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears.
3. Click the node name.

   The Node Details page appears.
4. Click **Advanced**.
5. In the Add field, enter an IP address for the node.
6. Click **Update**.

   The IP address is added to the list of IP addresses for the node.

See Also

- Section 5.3.1, "Viewing the Status of an Interaction Center Server Manager Node"
- Section 5.3.2, "Stopping an Interaction Center Server Manager Node"
- Section 5.3.3, "Modifying an Environment File for an Interaction Center Server Manager Node"
- Section 5.3.5, "Specifying an IP Address for a Server Process (Multihomed Nodes)"

- Section 5.3.6, "Removing an Interaction Center Server Manager Node"

5.3.5 Specifying an IP Address for a Server Process (Multihomed Nodes)

An Interaction Center Server Manager node may have more than one IP address. A machine with more that one IP address is known as a multihomed machine. Interaction Center Server Manager discovers only one of those IP addresses. The remaining IP addresses must be manually added to the IP address list for the node.

Use this procedure to select an IP address in the IP address list for a specific server process assigned to an Interaction Center Server Manager node.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Implement Interaction Center Server Manager.
- Add additional IP addresses to the node IP address list.
- Stop Interaction Center Server Manager.

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears.
3. Click a node name.

   The Node Details page appears.
4. In the IP Address column, do one of the following:
   - Leave the IP Address field blank.

     Interaction Center Server Manager will use one of the available IP addresses in the list. If there is only one IP address, the Interaction Center Server Manager uses that IP address.
   - Select an IP address.

When the server process is running, Interaction Center Server Manager communicates using the selected IP address.

5. Click **Update**.

   The Node Details page is refreshed.

See Also

- Section 5.3.1, "Viewing the Status of an Interaction Center Server Manager Node"
- Section 5.3.2, "Stopping an Interaction Center Server Manager Node"
- Section 5.3.3, "Modifying an Environment File for an Interaction Center Server Manager Node"
- Section 5.3.4, "Adding an IP Address to the Node IP Address List (Multihomed Nodes)"
- Section 5.3.6, "Removing an Interaction Center Server Manager Node"

5.3.6 Removing an Interaction Center Server Manager Node

Use this procedure to remove an interaction center server node. All server processes on the node remain in the server group without an assigned node.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Stop any server processes that are running on the node.

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears.
3. Select the Remove checkbox for the node that you want to remove.

4. Click **Update**.

   The node is removed and the Node List page is refreshed.

> **Note:** This does not remove the Interaction Center Server Manager files from the node. If you start the Interaction Center Server Manager node, then the node will reappear in the node list. See Section 5.2.4, "Starting the Interaction Center Server Manager Node".

See Also

- Section 5.3.1, "Viewing the Status of an Interaction Center Server Manager Node"
- Section 5.3.2, "Stopping an Interaction Center Server Manager Node"
- Section 5.3.3, "Modifying an Environment File for an Interaction Center Server Manager Node"
- Section 5.3.4, "Adding an IP Address to the Node IP Address List (Multihomed Nodes)"
- Section 5.3.5, "Specifying an IP Address for a Server Process (Multihomed Nodes)"

5.4 Implementing a Single-Site Interaction Center

Perform the steps in the following table to implement a single-site interaction center. The Number column indicates the step order. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Responsibility column indicates the Oracle Applications user account responsibility required to complete the step.

If you have defined an administrator for an Oracle interaction center, then that user has all of the responsibilities necessary to implement a single-site interaction center. See Section 5.1, "Defining an Administrator for Oracle Interaction Center".

Number	Required?	Description	Responsibility
❑ Step 1	Required	**Create a single-site interaction center.** See: Section 5.4.1, "Creating a Single-Site Interaction Center"	Call Center HTML Administration
❑ Step 2	Required	**Implement Advanced Inbound.** See: *Oracle Advanced Inbound Implementation Guide*	Not Applicable
❑ Step 3	Optional	**Implement Advanced Outbound.** See: *Oracle Advanced Outbound Implementation Guide*	Not Applicable
❑ Step 4	Required	**Implement Universal Work Queue.** See: *Oracle Universal Work Queue Implementation Guide*	Not Applicable

See Also

- Section 5.1, "Defining an Administrator for Oracle Interaction Center"
- Section 5.2, "Implementing an Interaction Center Server Manager Node"
- Section 5.3, "Administering an Interaction Center Server Manager Node"
- Section 5.5, "Implementing a Multi-Site Interaction Center"
- Section 5.6, "Administering an Interaction Center"
- Section 5.7, "Creating an Interaction Center Agent"

5.4.1 Creating a Single-Site Interaction Center

A typical single-site interaction center for Advanced Inbound consists of:

- one Inbound Telephony Server
- one Interaction Queue and Distribution server
- one or more Telephony Manager servers
- one or more Universal Work Queue servers
- one or more Routing servers
- (optionally) one Switch Simulator server

Use this procedure to create a single-site Oracle interaction center for Advanced Inbound.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Oracle Call Center Connectors.
- Install and configure an Interaction Center Server Manager node.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click **Create**.

   The Server Group Details page appears.
4. Enter the details about the server group.
   a. Enter a unique name for the server group.
   b. Optionally, in the Location field, enter the location of the server group.

      This field is for informational purposes only.
   c. Optionally, in the Description field, enter a description of the server group.

      This field is for informational purposes only.
   d. Leave the Super Group field blank.

      The super group identifies the global server group for a multi-site interaction center.
   e. In the Default Node field, select the Interaction Center Server Manager node for the interaction center server processes in the server group.

      The default node is used during a typical or custom server group configuration. In a typical or custom server group configuration, server processes are created when the server group is created. They are assigned to the default Interaction Center Server Manager node. You can modify the node assignment after the server group is created.

f. In the Server Configuration field, select a configuration type for creation of the server group.

You have the following options:

Configuration Type	Description
Typical	The server group is created with the default set of server processes necessary to implement a single-site interaction center for Advanced Inbound: ■ Interaction Queueing and Distribution (<servergroupname>_IQD) ■ Inbound Telephony Server (<servergroupname>_ITS) ■ Routing Server (<servergroupname>_ORS) ■ Telephony Manager (<servergroupname>_OTM) ■ Switch Simulator (<servergroupname>_SWITCH) ■ Universal Work Queue Server (<servergroupname>_UWQ) You will not be able to modify the server process names or types. Server processes must be added or removed from the Server Group Details page.
Custom	The Server page appears with the default set of server processes necessary to implement a single-site interaction center for Advanced Inbound (see Typical for a list of server processes). Use the Server page to add or remove server processes and to modify the general details about each server process before it is added to the server group.
None	When the server group is created, no server processes are added to the server group. You must manually add any server process to the server group.

5. Click **Submit**.

If the server configuration is None or Typical, then the server group is created and the Server Group Details page is refreshed.

If the server configuration is Custom, then the Server page appears. Enter the general details about the server processes and then click **Submit**. The Server Group Details page is refreshed.

In the Server Group Details page, a list of server processes appears under the Servers section. For information about modifying the server group, see Section 5.6, "Administering an Interaction Center".

6. If you make any changes, then click **Update**.

5.5 Implementing a Multi-Site Interaction Center

Perform the steps in the following table to implement a multi-site interaction center. The Number column indicates the step order. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Responsibility column indicates the Oracle Applications user account responsibility required to complete the step.

If you have defined an administrator for an Oracle interaction center, then that user has all of the responsibilities necessary to implement a multi-site interaction center. See Section 5.1, "Defining an Administrator for Oracle Interaction Center".

Number	Required?	Description	Responsibility
❑ Step 1	Required	**Create a multi-site interaction center.** See: Section 5.5.1, "Creating a Multi-Site Interaction Center"	Call Center HTML Administration
❑ Step 2	Required	**Implement Advanced Inbound.** See: *Oracle Advanced Inbound Implementation Guide*	Not Applicable
❑ Step 3	Optional	**Implement Advanced Outbound.** See: *Oracle Advanced Outbound Implementation Guide*	Not Applicable
❑ Step 4	Required	**Implement Universal Work Queue.** See: *Oracle Universal Work Queue Implementation Guide*	Not Applicable

See Also

- Section 5.1, "Defining an Administrator for Oracle Interaction Center"
- Section 5.2, "Implementing an Interaction Center Server Manager Node"
- Section 5.3, "Administering an Interaction Center Server Manager Node"
- Section 5.4, "Implementing a Single-Site Interaction Center"
- Section 5.6, "Administering an Interaction Center"
- Section 5.7, "Creating an Interaction Center Agent"

5.5.1 Creating a Multi-Site Interaction Center

A typical multi-site interaction center for Advanced Inbound consists of a global site and two or more local sites.

Topics include:

- Section 5.5.1.1, "Creating a Global Site for a Multi-Site Interaction Center"
- Section 5.5.1.2, "Creating a Local Site for a Multi-Site Interaction Center"

5.5.1.1 Creating a Global Site for a Multi-Site Interaction Center

A global site in a multi-site interaction center typically consists of:

- one Interaction Queue and Distribution server
- one or more Routing servers

Use this procedure to create a global site for a multi-site interaction center.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Oracle Call Center Connectors.
- Install and configure an Interaction Center Server Manager node.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click **Create**.

   The Server Group Details page appears.
4. Enter the details about the server group.
   a. Enter a unique name for the server group.

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

This field is for informational purposes only.

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

This field is for informational purposes only.

d. Leave the Super Group field blank.

The super group identifies the global server group for a multi-site interaction center.

e. In the Default Node field, select the Interaction Center Server Manager node for the interaction center server processes in the server group.

The default node is used during a typical or custom server group configuration. In a typical or custom server group configuration, server processes are created when the server group is created. They are assigned to the default Interaction Center Server Manager node. You can modify the node assignment after the server group is created.

f. In the Server Configuration field, select a configuration type for creation of the server group.

You have the following options:

Configuration Type	Description
Typical	The server group is created with the default set of server processes necessary to implement a single-site interaction center for Advanced Inbound: ■ Interaction Queueing and Distribution (<servergroupname>_IQD) ■ Inbound Telephony Server (<servergroupname>_ITS) ■ Routing Server (<servergroupname>_ORS) ■ Telephony Manager (<servergroupname>_OTM) ■ Switch Simulator (<servergroupname>_SWITCH) ■ Universal Work Queue Server (<servergroupname>_UWQ) You will not be able to modify the server process names or types. Server processes must be added or removed from the Server Group Details page.

Configuration Type	Description
Custom	The Server page appears with the default set of server processes necessary to implement a single-site interaction center for Advanced Inbound (see Typical for a list of server processes). Use the Server page to add or remove server processes and to modify the general details about each server process before it is added to the server group.
None	When the server group is created, no server processes are added to the server group. You must manually add any server process to the server group.

5. Click **Submit**.

   If the server configuration is None or Typical, then the server group is created and the Server Group Details page is refreshed.

   If the server configuration is Custom, then the Server page appears. Enter the general details about the server processes and then click **Submit**. The Server Group Details page is refreshed.

   In the Server Group Details page, a list of server processes appears under the Servers section. For information about modifying the server group, see Section 5.6, "Administering an Interaction Center".

6. Ensure that you have only one Interaction Queue and Distribution server and *one* Routing server in this global server group.

7. If you make any changes, then click **Update**.

See Also

- Section 5.5.1.2, "Creating a Local Site for a Multi-Site Interaction Center"

5.5.1.2 Creating a Local Site for a Multi-Site Interaction Center

A local site in a multi-site interaction center typically consists of:

- one Inbound Telephony Server
- one or more Telephony Manager servers
- one or more Universal Work Queue servers

Use this procedure to create a local site for a multi-site interaction center.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Oracle Call Center Connectors.
- Install and configure an Interaction Center Server Manager node.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click **Create**.

   The Server Group Details page appears.
4. Enter the details about the server group.
   a. Enter a unique name for the server group.
   b. Optionally, in the Location field, enter the location of the server group.

      This field is for informational purposes only.
   c. Optionally, in the Description field, enter a description of the server group.

      This field is for informational purposes only.
   d. In the Super Group field, select the name of the global server group for the multi-site interaction center.
   e. In the Default Node field, select the Interaction Center Server Manager node for the interaction center server processes in the server group.

      The default node is used during a typical or custom server group configuration. In a typical or custom server group configuration, server processes are created when the server group is created. They are assigned to the default Interaction Center Server Manager node. You can modify the node assignment after the server group is created.

f. In the Server Configuration field, select a configuration type for creation of the server group.

You have the following options:

Configuration Type	Description
Typical	The server group is created with the default set of server processes necessary to implement a single-site interaction center for Advanced Inbound: ■ Interaction Queueing and Distribution (<servergroupname>_IQD) ■ Inbound Telephony Server (<servergroupname>_ITS) ■ Routing Server (<servergroupname>_ORS) ■ Telephony Manager (<servergroupname>_OTM) ■ Switch Simulator (<servergroupname>_SWITCH) ■ Universal Work Queue Server (<servergroupname>_UWQ) You will not be able to modify the server process names or types. Server processes must be added or removed from the Server Group Details page.
Custom	The Server page appears with the default set of server processes necessary to implement a single-site interaction center for Advanced Inbound (see Typical for a list of server processes). Use the Server page to add or remove server processes and to modify the general details about each server process before it is added to the server group.
None	When the server group is created, no server processes are added to the server group. You must manually add any server process to the server group.

5. Click **Submit**.

If the server configuration is None or Typical, then the server group is created and the Server Group Details page is refreshed.

If the server configuration is Custom, then the Server page appears. Enter the general details about the server processes and then click **Submit**. The Server Group Details page is refreshed.

In the Server Group Details page, a list of server processes appears under the Servers section. For information about modifying the server group, see Section 5.6, "Administering an Interaction Center".

6. Ensure that you have one Inbound Telephony Server, one or more Telephony Manager servers, and one or more Universal Work Queue servers is this local server group.

   You should not have an Interaction Queueing and Distribution server or any Routing servers in a local server group in a multi-site interaction center.

7. If you make any changes, then click **Update**.

See Also

- Section 5.5.1.1, "Creating a Global Site for a Multi-Site Interaction Center"

5.6 Administering an Interaction Center

Topics include:

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.5, "Starting Server Processes"
- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.7, "Removing a Server Process"
- Section 5.6.8, "Removing an Interaction Center Server Group"

See Also

- Section 5.1, "Defining an Administrator for Oracle Interaction Center"
- Section 5.2, "Implementing an Interaction Center Server Manager Node"
- Section 5.3, "Administering an Interaction Center Server Manager Node"
- Section 5.4, "Implementing a Single-Site Interaction Center"
- Section 5.5, "Implementing a Multi-Site Interaction Center"
- Section 5.7, "Creating an Interaction Center Agent"

5.6.1 Viewing the Status of a Server Process

Topics include:

- Section 5.6.1.1, "Viewing the Status of a Server Process in a Server Group"
- Section 5.6.1.2, "Viewing the Status of a Server Process on an Interaction Center Server Manager Node"

See Also

- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.5, "Starting Server Processes"
- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.7, "Removing a Server Process"
- Section 5.6.8, "Removing an Interaction Center Server Group"

5.6.1.1 Viewing the Status of a Server Process in a Server Group

Use this procedure to the status of an interaction center server process in a server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Interaction Center Server Manager.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click a server group name.

The Server Group Details page appears.The status of each server process assigned to the node is displayed in the Servers area in the Status column. The following table describes the statuses.

Status	Description
Red flag	The server process is not running.
Green flag	The server process is running.
Red circle with a white "x"	The Interaction Center Server Manager node is not running or the server process is not assigned to an Interaction Center Server Manager node.

See Also

- Section 5.6.1.2, "Viewing the Status of a Server Process on an Interaction Center Server Manager Node"

5.6.1.2 Viewing the Status of a Server Process on an Interaction Center Server Manager Node

Use this procedure to the status of an interaction center server process on an Interaction Center Server Manager node.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Interaction Center Server Manager.

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears.
3. Click a node name.

The Node Details page appears. The status of each server process assigned to the node is displayed in the Servers area in the Status column. The following table describes the statuses.

Status	Description
Red flag	The server process is not running.
Green flag	The server process is running.
Red circle with a white "x"	The Interaction Center Server Manager node is not running or the server process is not assigned to an Interaction Center Server Manager node.

See Also

- Section 5.6.1.1, "Viewing the Status of a Server Process in a Server Group"

5.6.2 Adding a Server Process to an Interaction Center Server Group

Use this procedure to add a server process to an interaction center server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure an Interaction Center Server Manager node.
- Create an interaction center server group.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click a server group name.

   The Server Group Details page appears.

4. In the Servers area, click **Create**.

   The Server Details - General page appears.

5. Enter the general details about the server.

   a. Enter a unique name for the server.

   b. In the Type Name field, select the server type.

   c. Optionally, in the Location field, enter the location of the server.

      This field is for informational purposes only.

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

      This field is for informational purposes only.

   e. From the Member Server Group list, select a server group for the server process.

      Note: The Using Server Group field is reserved for future use. Leave it blank.

      ---

   f. In the Node Assignment field, select the Interaction Center Server Manager node to which the server process will be assigned.

   g. Click **Save**.

      The Server Details - General page is refreshed.

6. If you want to specify standard parameters for the server process, then click **Parameters**.

   The Server Details - Parameters page appears.

   a. In the Parameter Value field, enter a value for the parameter.

      For a list of server process parameters, see Appendix B, "Oracle Interaction Center Server Parameters".

   b. Click **Update**.

      The Server Details - Parameters page is refreshed.

7. If you want to specify java options or command line parameters, then click **Advanced**.

   The Server Details - Advanced page appears.

a. If you want to specify java options for the server process, then enter the parameters in the Java Options field.

b. If you want to specify command line parameters for the server process, then enter the parameters in the Server Arguments field.

c. Click **Update**.

   The Servers Details - Advanced page is refreshed.

See Also

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.5, "Starting Server Processes"
- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.7, "Removing a Server Process"
- Section 5.6.8, "Removing an Interaction Center Server Group"

5.6.3 Moving a Server Process to a Different Node

Topics include:

- Section 5.6.3.1, "Changing Server Process Node Assignments in a Server Group"
- Section 5.6.3.2, "Changing Server Process Node Assignments on a Node"

See Also

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.5, "Starting Server Processes"
- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.7, "Removing a Server Process"
- Section 5.6.8, "Removing an Interaction Center Server Group"

5.6.3.1 Changing Server Process Node Assignments in a Server Group

Interaction center server processes can run on any Interaction Center Server Manager node. Use this procedure to change the node assignment for server processes in a server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure an Interaction Center Server Manager node.
- Create an interaction center server group.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click a server group name.

   The Server Group Details page appears.
4. In the Servers area, click **Create**.

   The Server Details - General page appears.
5. In the Node Assignment field, select the Interaction Center Server Manager node to which the server process will be assigned.
6. Click **Save**.

   The Server Details - General page is refreshed.

See Also

- Section 5.6.3.2, "Changing Server Process Node Assignments on a Node"

5.6.3.2 Changing Server Process Node Assignments on a Node

Interaction center server processes can run on any Interaction Center Server Manager node. Use this procedure to change the node assignment for server processes on a node.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Stop any server processes that you want to move.

Steps

1. Select the ICSM tab.
1. Click **Nodes**.

   The Node List page appears.
2. Click the name of the Interaction Center Server Manager node to which you wish to move the server processes.

   The Node Details - General page appears.
3. Click **Assignments**.

   The Node Details - Assignment page appears.
4. In the Select Server Group field, select the server group from which you wish to move server processes.

   The Available Servers list displays the server processes in the server group that are not assigned to the selected node.
5. In the Available Servers list, select the server processes that you wish to assign to the selected node.

   Press CTRL and click the mouse buttonto select multiple server processes.
6. Click the left arrow button to assign the server processes to the node.
7. Click **Update**.

Note: Save your changes before selecting another server from the Select Server Group field.

See Also

- Section 5.6.3.2, "Changing Server Process Node Assignments on a Node"

5.6.4 Configuring Interaction Center Server Process Parameters

Use this procedure to configure the parameters for a server in an Oracle interaction center server group.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Create a server group.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click the server group name.

   The Server Group Details page displays.
4. In the Servers area, click a server name.

   The Server Details - General page appears for the specified server.
5. Click **Parameters**.

   The Server Details - Parameters page appears.
6. In the Parameter Value field, enter a value for the parameter.

   For a list of server process parameters, see Appendix B, "Oracle Interaction Center Server Parameters".

7. Click **Update**.

See Also

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.5, "Starting Server Processes"
- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.7, "Removing a Server Process"
- Section 5.6.8, "Removing an Interaction Center Server Group"

5.6.5 Starting Server Processes

Topics include:

- Section 5.6.5.1, "Starting All Server Processes in an Interaction Center Server Group"
- Section 5.6.5.2, "Starting a Specific Server Process in an Interaction Center Server Group"
- Section 5.6.5.3, "Starting a Specific Server Process on an Interaction Center Server Manager Node"

See Also

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.7, "Removing a Server Process"
- Section 5.6.8, "Removing an Interaction Center Server Group"

5.6.5.1 Starting All Server Processes in an Interaction Center Server Group

Use this procedure to start all interaction center server processes in a server group. Server processes are automatically started in the correct order.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Interaction Center Server Manager.
- Create an interaction center server group.
- Assign server processes in the server group to Interaction Center Server Manager nodes.
- Start the Interaction Center Server Manager nodes to which the server processes are assigned.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click a server group name.

   The Server Group Details page appears.
4. In the Server Group Details area, select **Start** and then click **Submit**.

   It may take several minutes to start the server processes. To view the current status during startup, refresh the browser several times.

   As the server processes are starting up, "Starting" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

See Also

- Section 5.6.5.2, "Starting a Specific Server Process in an Interaction Center Server Group"

- Section 5.6.5.3, "Starting a Specific Server Process on an Interaction Center Server Manager Node"

5.6.5.2 Starting a Specific Server Process in an Interaction Center Server Group

Use this procedure to start a specific interaction center server process in a server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Interaction Center Server Manager.
- Create an interaction center server group.
- Assign server processes in the server group to Interaction Center Server Manager nodes.
- Start the Interaction Center Server Manager nodes to which the server processes are assigned.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click a server group name.

   The Server Group Details page appears.
4. In the Servers area, in the Stop/Start column, click **Start** for the server process that you want to start.

   It may take several minutes to start the server process. To view the current status during startup, refresh the browser several times.

   As the server process is starting up, "Starting" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

See Also

- Section 5.6.5.1, "Starting All Server Processes in an Interaction Center Server Group"
- Section 5.6.5.3, "Starting a Specific Server Process on an Interaction Center Server Manager Node"

5.6.5.3 Starting a Specific Server Process on an Interaction Center Server Manager Node

Use this procedure to start a specific interaction center server process on an Interaction Center Server Manager node.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Interaction Center Server Manager.
- Create an interaction center server group.
- Assign server processes in the server group to Interaction Center Server Manager nodes.
- Start the Interaction Center Server Manager nodes to which the server processes are assigned.

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears.
3. Click a node name.

   The Node Details page appears.
4. In the Stop/Start column, click **Start** for the server process that you want to start.

It may take several minutes to start the server process. To view the current status during startup, refresh the browser several times.

As the server process is starting up, "Starting" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

See Also

- Section 5.6.5.1, "Starting All Server Processes in an Interaction Center Server Group"
- Section 5.6.5.2, "Starting a Specific Server Process in an Interaction Center Server Group"

5.6.6 Stopping Server Processes

Topics include:

- Section 5.6.6.1, "Stopping All Server Processes in an Interaction Center Server Group"
- Section 5.6.6.2, "Stopping a Specific Server Process in an Interaction Center Server Group"
- Section 5.6.6.3, "Stopping a Specific Server Process on an Interaction Center Server Manager Node"

See Also

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.5, "Starting Server Processes"
- Section 5.6.7, "Removing a Server Process"
- Section 5.6.8, "Removing an Interaction Center Server Group"

5.6.6.1 Stopping All Server Processes in an Interaction Center Server Group

Use this procedure to start all interaction center server processes in a server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure Interaction Center Server Manager.
- Create an interaction center server group.
- Assign server processes in the server group to Interaction Center Server Manager nodes.
- Start the Interaction Center Server Manager nodes to which the server processes are assigned.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click a server group name.

   The Server Group Details page appears.
4. In the Server Group Details area, select **Stop** and then click **Submit**.

   It may take several minutes to stop the server processes. To view the current status during shutdown, refresh the browser several times.

   As the server processes are shutting down, "Stopping" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

See Also

- Section 5.6.6.2, "Stopping a Specific Server Process in an Interaction Center Server Group"
- Section 5.6.6.3, "Stopping a Specific Server Process on an Interaction Center Server Manager Node"

5.6.6.2 Stopping a Specific Server Process in an Interaction Center Server Group

Use this procedure to stop a specific interaction center server process in a server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Start the Interaction Center Server Manager nodes to which the server process is assigned.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Click a server group name.

   The Server Group Details page appears.
4. In the Servers area, in the Stop/Start column, click **Stop** for the server process that you want to stop.

   It may take several minutes to stop the server process. To view the current status during shutdown, refresh the browser several times.

   As the server process is shutting down, "Stopping" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

See Also

- Section 5.6.6.1, "Stopping All Server Processes in an Interaction Center Server Group"
- Section 5.6.6.3, "Stopping a Specific Server Process on an Interaction Center Server Manager Node"

5.6.6.3 Stopping a Specific Server Process on an Interaction Center Server Manager Node

Use this procedure to stop a specific interaction center server process on an Interaction Center Server Manager node.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Start the Interaction Center Server Manager nodes to which the server process is assigned.

Steps

1. Select the ICSM tab.
2. Click **Nodes**.

   The Node List page appears.
3. Click a node name.

   The Node Details page appears.
4. In the Stop/Start column, click **Stop** for the server process that you want to stop.

   It may take several minutes to stop the server process. To view the current status during shutdown, refresh the browser several times.

   As the server process is shutting down, "Stopping" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

See Also

- Section 5.6.6.1, "Stopping All Server Processes in an Interaction Center Server Group"
- Section 5.6.6.2, "Stopping a Specific Server Process in an Interaction Center Server Group"

5.6.7 Removing a Server Process

Topics include:

- Section 5.6.7.1, "Removing a Server Process from an Interaction Center Server Group"
- Section 5.6.7.2, "Removing a Server Process from an Interaction Center Server Manager Node"

See Also

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.5, "Starting Server Processes"
- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.8, "Removing an Interaction Center Server Group"

5.6.7.1 Removing a Server Process from an Interaction Center Server Group

Use this procedure to remove an interaction center server process from a server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Stop the server process if it is running.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.

3. Click a server group name.

   The Server Group Details page appears.

4. In the Servers area, select the Remove checkbox for the server process that you want to remove.

5. Click **Update**.

   The server process is removed from the server group and the Server Group List page is refreshed.

See Also

- Section 5.6.7.2, "Removing a Server Process from an Interaction Center Server Manager Node"

5.6.7.2 Removing a Server Process from an Interaction Center Server Manager Node

Use this procedure to remove an interaction center server from a machine. The server process remains in the server group without an assigned node.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Stop the server process if it is running.

Steps

1. Select the ICSM tab.

2. Click **Nodes**.

   The Node List page appears.

3. Click a node name.

   The Node Details page appears.

4. Select the Remove checkbox for the server process that you want to remove.

5. Click **Update**.

   The server is removed from the node and the Node Details page is refreshed.

See Also

- Section 5.6.7.1, "Removing a Server Process from an Interaction Center Server Group"

5.6.8 Removing an Interaction Center Server Group

Use this procedure to remove an interaction center server group.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Stop any server processes that are running in the server group.

Steps

1. Select the ICSM tab.
2. Click **Server Groups**.

   The Server Group List page appears.
3. Select the Remove checkbox for the server group that you want to remove.
4. Click **Update**.

   The server group is removed and the Server Group List page is refreshed.

See Also

- Section 5.6.1, "Viewing the Status of a Server Process"
- Section 5.6.2, "Adding a Server Process to an Interaction Center Server Group"
- Section 5.6.3, "Moving a Server Process to a Different Node"
- Section 5.6.4, "Configuring Interaction Center Server Process Parameters"
- Section 5.6.5, "Starting Server Processes"

- Section 5.6.6, "Stopping Server Processes"
- Section 5.6.7, "Removing a Server Process"

5.7 Creating an Interaction Center Agent

Perform the steps in the following table to define an interaction center agent. The Number column indicates the step order. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Responsibility column indicates the Oracle Applications user account responsibility required to complete the step.

If you have defined an administrator for an Oracle interaction center, then that user has all of the responsibilities necessary to create an interaction center agent.

Number	Required?	Description	Responsibility
❑ Step 1	Required	**Create an employee.** If Oracle Human Resource Management Systems is installed, see Section 5.7.1, "Creating an Employee in Oracle Human Resource Management Systems". If Oracle Human Resource Management Systems is *not* installed, see Section 5.7.2, "Creating an Employee in CRM Resource Manager".	HRMS Manager for Oracle Human Resource Management Systems OR CRM Resource Manager for CRM Resource Manager
❑ Step 2	Required	**Create an Oracle Applications user account for the employee.** See Section 5.7.3, "Creating an Oracle Applications User Account for an Employee".	System Administration
❑ Step 3	Required	**Configure system profile options.** See: Section 5.7.4, "Configuring Profile Options"	System Administrator
❑ Step 4	Required	**Create a CRM resource for the employee.** See Section 5.7.5, "Creating a CRM Resource for an Employee".	CRM Resource Manager
❑ Step 5	Required	**Configure resource roles for the CRM resource.** See: Section 5.7.6.1, "Configuring Resource Roles for an Agent"	CRM Resource Manager

Number	Required?	Description	Responsibility
❑ Step 6	TeleSales only	**Configure group member roles and usage for the CRM resource.** See: Section 5.7.6.2, "Configuring Group Member Roles and Usage for an Agent"	CRM Resource Manager
❑ Step 7	Telephony only	**Configure interaction center parameters for the CRM resource.** See: Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource"	CRM Resource Manager

See Also

- Section 5.1, "Defining an Administrator for Oracle Interaction Center"
- Section 5.2, "Implementing an Interaction Center Server Manager Node"
- Section 5.3, "Administering an Interaction Center Server Manager Node"
- Section 5.4, "Implementing a Single-Site Interaction Center"
- Section 5.5, "Implementing a Multi-Site Interaction Center"
- Section 5.6, "Administering an Interaction Center"
- Section 5.7, "Creating an Interaction Center Agent"

5.7.1 Creating an Employee in Oracle Human Resource Management Systems

Note: If you do *not* have Oracle Human Resource Management Systems installed, then see Section 5.7.2, "Creating an Employee in CRM Resource Manager".

Use this procedure to create an employee in Oracle Human Resource Management Systems (HRMS).

Login

Self-Service Login URL

Responsibility

HRMS Manager (for example, US HRMS Manager)

Prerequisites

- Review *Managing People Using Oracle HRMS*.

Steps

1. In the Navigator window, on the Functions tab, choose **People** > **Enter and Maintain**.

   The Find Person window appears.

2. Click **New**.

   The People window appears.

3. Enter the information for the new person.

   The following fields are required:

   - Last (Name)
   - Gender
   - Type

     Note: In the Type field, select **Employee**.

   - Employee (Number)

     Note: If the Employee field is inactive, then Oracle HRMS is set up to automatically generate the employee number when the record is saved.

   Other fields may be required depending on how your enterprise has set up Oracle HRMS. In addition, when you save the record, you may receive one or more messages that explain the consequences of leaving certain fields blank.

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

   You may close the People window.

See Also

- Section 5.7.2, "Creating an Employee in CRM Resource Manager"
- Section 5.7.3, "Creating an Oracle Applications User Account for an Employee"

- Section 5.7.4, "Configuring Profile Options"
- Section 5.7.5, "Creating a CRM Resource for an Employee"
- Section 5.7.6, "Configuring CRM Roles and Usage for an Agent"
- Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource"

5.7.2 Creating an Employee in CRM Resource Manager

> **Note:** If Oracle Human Resource Management Systems is installed, then see Section 5.7.1, "Creating an Employee in Oracle Human Resource Management Systems".

Use this procedure to create an employee when Oracle Human Resources Management Systems (HRMS) is not installed. This procedure populates the same database tables as the People window in Oracle Human Resource Management Systems.

Login

Self-Service Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Review *Oracle Foundation Concepts and Procedures*.

Steps

1. In the Navigator window, on the Functions tab, choose **Maintain Employee** > **Employee**.

   The Find Person window appears.

2. Click **New**.

   The People window appears.

3. Enter the information for the new person.

   The following fields are required:

- Last (Name)
- Gender
- Type

Note: In the Type field, select **Employee**.

- Employee (Number)

Note: If the Employee field is inactive, then Oracle CRM Resource Manager is setup to automatically generate the employee number when the record is saved.

Other fields may be required depending on how your enterprise has set up Oracle CRM Resource Manager. In addition, when you save the record, you may receive one or more messages that explain the consequences of leaving certain fields blank.

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

   You may close the People window.

See Also

- Section 5.7.1, "Creating an Employee in Oracle Human Resource Management Systems"
- Section 5.7.3, "Creating an Oracle Applications User Account for an Employee"
- Section 5.7.4, "Configuring Profile Options"
- Section 5.7.5, "Creating a CRM Resource for an Employee"
- Section 5.7.6, "Configuring CRM Roles and Usage for an Agent"
- Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource"

5.7.3 Creating an Oracle Applications User Account for an Employee

Use this procedure to create an Oracle Applications user and to associate an employee (created in Oracle Human Resource Management Systems or CRM Resource Manager) with a user account.

Login

Self-Service Login URL

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.

Steps

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

   The Users window appears.

   Use the following guidelines to define Oracle Applications usernames:

   - Use only alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
   - Use only the set of characters that your operating system supports for filenames.

2. In the User Name field, enter the name of the user.

   The password is temporary. When the user signs on to Oracle Applications for the first time, the message "Your password has expired" appears and the user is prompted to set a new password.

   Use the following guidelines to define Oracle Applications passwords:

   - Use at least five characters and no more than 100 characters.
   - Use only alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.

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

   The cursor remains in the Password field.

4. Enter the password again and then press Tab to verify the password.

5. In the Person field, select an employee to associate with this user account.

6. In the Responsibilities tab, add responsibilities.

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

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

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

   You may close the Users window.

See Also

- Section 5.7.1, "Creating an Employee in Oracle Human Resource Management Systems"
- Section 5.7.2, "Creating an Employee in CRM Resource Manager"
- Section 5.7.4, "Configuring Profile Options"
- Section 5.7.5, "Creating a CRM Resource for an Employee"
- Section 5.7.6, "Configuring CRM Roles and Usage for an Agent"
- Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource"

5.7.4 Configuring Profile Options

Use this procedure to set Oracle Interaction Center profile options for application work.

Login

Self-Service Login URL

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.
- For a list of profile options, review the "Profile Options" appendix in the product implementation guide.

Steps

1. In the Navigator window, on the Functions tab, choose **Profile** > **System**.

   The Find System Profile Values window appears. The Site and Profiles with No Values checkboxes are selected by default.

2. Specify the level or levels at which you wish to view or set profile option values.

   Typically, interaction center profile options are set for the Oracle Applications instance (for the purpose of profile options, this is also called the site). Then, if necessary, the profile options are modified for a user or a set of users working under a responsibility.

   - If you want to view or set profile options for all users at the installation site, select the Site box.
   - If you want to view or set profile options for users working under responsibilities owned by a specific application, select the Application box and then select an application from the Application list.
   - If you want to view or set profile options for users working under a specific responsibility, select the Responsibility box and then select a responsibility from the Responsibility list.
   - If you want to view or set profile options for a specific user, select the User box and then select a username from the User list.

3. If you want to display profile options both with and without values, select the Profiles with No Values checkbox.

4. If you want to display profile options that include a specific character string, enter the string in the Profile field.

   You may search for profile options using character strings and the wildcard symbol (%). For example, to find profile options prefixed by "IEU", the product code for Oracle Universal Work Queue, enter IEU%.

5. Click **Find**.

   The System Profile Values window appears.

6. Set the values for the profile options at one or more levels.

   When a profile option may be set at more than one level, the value entered at the Site level has the lowest priority. The value entered at the Site level is superseded by any value entered at the Application level value and the value entered at the Application level is superseded by any value entered at the

Responsibility level. The value entered at the User level has the highest priority and overrides values entered at any other level.

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

   Your changes take effect as soon as users sign on or change responsibility. You may close the System Profile Values window.

See Also

- Section 5.7.1, "Creating an Employee in Oracle Human Resource Management Systems"
- Section 5.7.2, "Creating an Employee in CRM Resource Manager"
- Section 5.7.3, "Creating an Oracle Applications User Account for an Employee"
- Section 5.7.5, "Creating a CRM Resource for an Employee"
- Section 5.7.6, "Configuring CRM Roles and Usage for an Agent"
- Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource"

5.7.5 Creating a CRM Resource for an Employee

Use this procedure to create a Customer Relationship Management (CRM) resource for an employee (created in Oracle Human Resource Management Systems or CRM Resource Manager).

Login

Self-Service Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Review *Oracle CRM Foundation Concepts and Procedures*.

Steps

1. In the Navigator window, on the Functions tab, choose **Maintain Resources** > **Import Resources**.

   The Selection Criteria window appears.

2. In the Resource Category field, select **Employee**.

3. Enter any additional selection criteria.

   For example, in the Name field, select the name of an employee.

4. Click **Search**.

   Employees that meet the search criteria are listed in the Search Results area. The Select checkboxes for the matching employees are automatically selected.

5. Clear the Select checkboxes of the employees for whom you do not want to create a CRM resource.

6. Click **Create Resource**.

   The Default Values window appears. You can add or modify this information in the resource details later.

7. Click **OK** to accept the defaults.

   The Selected Resources window appears. The Comments field indicates whether the resource is a new record, a duplicate record, or a duplicate record with a new role definition. The Select checkboxes are automatically selected.

8. Clear the Select checkboxes of the emplyees that you do not want to save as a resource.

9. To save the resources, click **Save Resource**.

   A transaction number appears in the Transaction Number field. The transaction number is associated with each resource created during this transaction. More than one resource can have the same transaction number.

10. To view the details about a resource, select the resource and then click **Details**.

    The Resource window appears. Verify the name of the resource (Name), the name of the employee (Source Name), and the user name (User Name) and note the resource number (Number).

    You may close the Resources, Selected Resources, Default Values, and Selection Criteria windows.

See Also

- Section 5.7.1, "Creating an Employee in Oracle Human Resource Management Systems"
- Section 5.7.2, "Creating an Employee in CRM Resource Manager"
- Section 5.7.3, "Creating an Oracle Applications User Account for an Employee"

- Section 5.7.4, "Configuring Profile Options"
- Section 5.7.6, "Configuring CRM Roles and Usage for an Agent"
- Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource"

5.7.6 Configuring CRM Roles and Usage for an Agent

Use this procedure to configure the CRM resource parameters for a resource using Oracle Interaction Center to access Oracle TeleSales.

Topics include:

- Section 5.7.6.1, "Configuring Resource Roles for an Agent"
- Section 5.7.6.2, "Configuring Group Member Roles and Usage for an Agent"

See Also

- Section 5.7.1, "Creating an Employee in Oracle Human Resource Management Systems"
- Section 5.7.2, "Creating an Employee in CRM Resource Manager"
- Section 5.7.3, "Creating an Oracle Applications User Account for an Employee"
- Section 5.7.4, "Configuring Profile Options"
- Section 5.7.5, "Creating a CRM Resource for an Employee"
- Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource"

5.7.6.1 Configuring Resource Roles for an Agent

Use this procedure to configure the CRM resource roles for an Oracle TeleSales user.

Login

Self-Service Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Create an employee.
- Create an Oracle Applications user account for the employee.

- Create a CRM resource for the employee.
- Review *Oracle CRM Foundation Concepts and Procedures*.
- Review *Oracle TeleSales Implementation Guide.*

Steps

1. In the Navigator window, on the Functions tab, choose **Resource Manager** > **Maintain Resources** > **Resources**.

   The Find Resources window appears.

2. Enter any selection criteria.

   For example, in the Name field, select the name of an employee.

3. Click **Find**.

   The Research Search Results window appears.

4. Select the resource and then click **Resource Details**.

   The Resource window appears, populated with information regarding the selected resource.

5. In the Roles tab, assign one or more roles to the resource.

   a. In the Role Type field, select a role type.

      The following table lists the minimum role types required to access application or media work in Oracle Universal Work Queue. Additional role types may be required to enable additional functionality in the business application. For more information, consult the implementation guide for the business application.

To use this application or feature...	Select this role type...
Oracle TeleSales	Telesales
Oracle TeleService	No role type requirement.
Oracle Advanced Inbound, Oracle Advanced Outbound	Callcenter

   b. In the Role field, select a role.

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

   You may close the Resource and Research Search Results windows.

See Also

- Section 5.7.6.2, "Configuring Group Member Roles and Usage for an Agent"

5.7.6.2 Configuring Group Member Roles and Usage for an Agent

Use this procedure to configure CRM group roles and usage for a agent.

Login

Self-Service Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Create an employee.
- Create an Oracle Applications user account for the employee.
- Create a CRM resource for the employee.
- Review *Oracle CRM Foundation Implementation Guide*.
- Review *Oracle TeleSales Implementation Guide*.

Steps

1. In the Navigator window, on the Functions tab, choose **Resource Manager** > **Maintain Resources** > **Groups**.

   The Define Groups window appears.

2. Find a group or create a group by entering a group name.
3. In the Members tab, add a resource to the group.
   a. In the Category field, enter **Employee**.
   b. In the Number field, enter the resource number or, in the Name field, enter the name of the resource.
   c. Click **Member Roles**.

      The Member Roles window appears.

   d. In the Role Type field, select a role type.

Note: Only the roles assigned to the resource in the Resource window Roles tab will be available for selection in the Member Roles window for a group member.

The following table lists the minimum role types required to access application or media work in Oracle Universal Work Queue. Additional role types may be required to enable additional functionality in the business application. For more information, consult the implementation guide for the business application.

To use this application or feature...	Select this role type...
Oracle TeleSales	Telesales
Oracle TeleService	No role type requirement.
Oracle Advanced Inbound, Oracle Advanced Outbound	Callcenter

e. In the Role field, select a role.

f. Click **OK**.

4. In the Usages tab, enter one or more usages for the group.

The following table lists the minimum usages required to access application or media work in Oracle Universal Work Queue. Additional usages may be required to enable additional functionality in the business application. For more information, consult the implementation guide for the business application.

To use this application or feature...	Select this usage...
Oracle TeleSales	Sales and TeleSales
Oracle TeleService	No usage requirement.
Oracle Advanced Inbound, Oracle Advanced Outbound	Call Center

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

You may close the Define Groups window.

See Also

- Section 5.7.6.1, "Configuring Resource Roles for an Agent"

5.7.7 Configuring Interaction Center Parameters for a CRM Resource

Note: This procedure applies to media work only.

Use this procedure to configure the interaction center parameters for a CRM (Customer Relationship Management) resource. Use the Interaction Center tab in the Resource window to specify the following information for the CRM resource:

- Interaction center server group
- Telephony parameters

Login

Self-Service Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Create an employee.
- Create an Oracle Applications user account for the employee.
- Create a CRM resource for the employee.
- Create a middleware definition. Review *Oracle Advanced Inbound Implementation Guide*.

Steps

1. In the Navigator window, on the Functions tab, choose **Maintain Resources** > **Resources**.

   The Find Resources window appears.

2. Enter any selection criteria.

   For example, in the Name field, select the name of an employee.

3. Click **Find**.

The Resource Search Results window appears.

4. Select a resource and then click **Resource Details**.

   The Resource window appears.

5. In the Interaction Center tab, specify the interaction center parameters.

   a. In the Interaction Center field, select the interaction center server group for the resource.

   b. For inbound and outbound telephony, in the Telephony Parameters area, enter the telephony parameters for the agent.

      * In the Middleware field, select the middleware configuration that the selected interaction center server group uses to communicate with the switch and middleware.

      * In the Parameter field, select a parameter name.

      * In the Value field, enter a value for the parameter.

        The telephony parameters required for a resource depend on the type of switch and middleware used in the interaction center.

Aspect CallCenter v.8.0.2 SP01 with Cisco ICM

If you are using an Aspect CallCenter v.8.0.2 SP01 switch with Cisco ICM middleware, then use the following table to set the telephony parameters for the agent.

Parameter	Description	Example
ACD Data 1	Agent's ACD password, as defined in the PBX admin.	1001
ACD Data 2	Agent's ACD login ID, as defined in the PBX admin.	1001
ACD Queue	Agent's skill group number, as defined in the PBX admin.	46

Avaya Definity v9 (via EAS) with Cisco ICM

If you are using an Avaya Definity v9 (via EAS) switch with Cisco ICM middleware, then use the following table to set the telephony parameters for the agent.

Parameter	Description	Example

ACD Data 1	Agent's ACD password, as defined in the PBX admin.	34181
ACD Data 2	Agent's ACD login ID, as defined in the PBX admin.	34181
ACD Queue	Agent's skill group number, as defined in the Cisco ICM configuration	46

Avaya Definity v9 (via EAS) with Intel CT Connect

If you are using an Avaya Definity v9 (via EAS) switch with Intel CT Connect middleware, then use the following table to set the telephony parameters for the agent.

Parameter	Description	Example
ACD Data 1	Agent's ACD password, if any, as defined in the PBX admin.	34181
ACD Data 2	Agent's ACD login ID, as defined in the PBX admin.	34181

Nortel Meridian r25 (via Meridian Link Services v4) with Cisco ICM

If you are using a Nortel Meridian r25 (w/ Meridian Link Services v4) switch with Cisco ICM middleware, then use the following table to set the telephony parameters for the agent.

Parameter	Description	Example
ACD Data 2	The Agent Peripheral Number defining in the Cisco ICM configuration.	8701

Nortel Meridian r25 (via Meridian Link Services v4) with Intel CT Connect

If you are using a Nortel Meridian r25 (w/ Meridian Link Services v4) with Intel CT Connect middleware, then use the following table to set the telephony parameters for the agent.

Parameter	Description	Example
ACD Data 1	(Required only when the switch is in login ID mode) Agent's ACD login ID, as defined in the PBX admin.	1001

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

See Also

- Section 5.1, "Defining an Administrator for Oracle Interaction Center"
- Section 5.2, "Implementing an Interaction Center Server Manager Node"
- Section 5.3, "Administering an Interaction Center Server Manager Node"
- Section 5.4, "Implementing a Single-Site Interaction Center"
- Section 5.5, "Implementing a Multi-Site Interaction Center"
- Section 5.6, "Administering an Interaction Center"

6

Verifying the Implementation

Topics include:

- Section 6.1, "Oracle Interaction Center Implementation Verification Tasks"
- Section 6.2, "Implementing the Web Phone for Inbound Call to the Switch Simulator"
- Section 6.3, "Testing Advanced Inbound Using the Switch Simulator"

6.1 Oracle Interaction Center Implementation Verification Tasks

Perform the steps in the following table to verfiy the implemention of Oracle Interaction Center. The Number column indicates the step order. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Responsibility column indicates the Oracle Applications user account responsibility required to complete the step.

If you have defined an administrator for Oracle Interaction Center media work, then that user will have all of the responsibilities necessary to implement Oracle Interaction Center.

Number	Required?	Description	Responsibility
❑ Step 1	Required	**Create a server group.** See: Section 5.4.1, "Creating a Single-Site Interaction Center"	Call Center HTML Administration
❑ Step 2	Required	Create a middleware configuration. See: Section 6.1.1, "Creating a Middleware Defintion for Use with the Switch Simulator"	Call Center HTML Administration

Number	Required?	Description	Responsibility
❑ Step 3	Required	Configure the parameters for the interaction center servers. See: Section 6.1.2, "Configuring the Interaction Center Server Process Parameters for Use with the Switch Simulator"	Call Center HTML Administration
❑ Step 4	Required	Create teleset configurations. See: Section 6.1.3, "Creating Teleset Configurations"	Call Center HTML Administration
❑ Step 5	Required	Configure Oracle Universal Work Queue to produce a application screen pop for media work. See: Section 6.1.4, "Configuring a Media Screen Pop for Oracle Interaction Center"	Call Center HTML Administration
❑ Step 6	Required	Create a web phone use for simulating a customer call to the switch simulator. See: Section 6.2.1, "Creating Web Phone User Account"	CCT_WEBPHONE_DEMO_RESP
❑ Step 7	Required	Configure the system profile options for the web phone. See: Section 6.2.2, "Configuring the Web Phone Profile Options for the Web Phone User"	System Administrator
❑ Step 8	Required	**Configure the system profile options for media work in Oracle Interaction Center.** See Section 6.1.5, "Configuring Profile Options for Media Work".	System Administrator
❑ Step 9	Required	Start the servers in the interaction center server group. See: Section 5.2.4, "Starting the Interaction Center Server Manager Node"	Call Center HTML Administration

See Also

- Section 6.2, "Implementing the Web Phone for Inbound Call to the Switch Simulator"
- Section 6.3, "Testing Advanced Inbound Using the Switch Simulator"

6.1.1 Creating a Middleware Defintion for Use with the Switch Simulator

Use this procedure to define a middleware configuration to be used with the switch simulator. The switch simulator simulates a Nortel Meridian switch. Using this configuration with the switch simulator, you can verify interaction center

application configuration without concern for switch-specific functionality. This can help validate implementations by abstracting issues with switch setup.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Implement Oracle Call Center Connectors

Steps

1. Click the Call Center tab.
2. Click **Middleware**.

   The Middleware Details page displays.
3. In the Choose Server Group field, select a server group.
4. Click **Create**.
5. Enter the information for the middleware defintion.

Field	Value	Example
Middleware Name	The name of the middleware configuration defined for use with the Switch Simulator server.	servergroup_mw
IP Address	The IP address of the Interaction Center Server Manager node to which the Switch Simulator server is assigned.	123.4.5.67
Port	The listener port fo the Switch Simulator server.	3201
Middleware Type	Connectors for CT-Connect	NA

6. Click **Update**.

   The Teleset Details, Route Point Details, and Middleware Parameters areas appear.

7. In the Parameters area, enter the following values:

Parameter	Value	Example
PBX Name	nortel	NA
PBX Type	Nortel Meridan	NA
CTI Enabler Server IP Address	<IP address of the ICSM node for the Switch Simulator>	123.4.5.67
Middleware Server Info 1	ncan_ip_tcp	NA

8. Click **Update**.

See Also

- Section 6.1.2, "Configuring the Interaction Center Server Process Parameters for Use with the Switch Simulator"
- Section 6.1.3, "Creating Teleset Configurations"
- Section 6.1.4, "Configuring a Media Screen Pop for Oracle Interaction Center"
- Section 6.1.5, "Configuring Profile Options for Media Work"

6.1.2 Configuring the Interaction Center Server Process Parameters for Use with the Switch Simulator

Use this procedure to configure the parameters for a server in an Oracle interaction center server group.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Create a server group.

Steps

1. Select the ICSM tab.

2. Click **Server Groups**.

   The Server Group List page appears.

3. Click the server group name.

   The Server Group Details page displays.

4. In the Servers area, click the Inbound Telephony Server name.

   The Server Details - General page appears for the specified server.

5. Click **Parameters**.

   The Server Details - Parameters page appears.

6. In the Parameter Value field for TELE_MIDDLEWARE_CONFIG, enter the name of your middleware configuration.

7. Click **Update**.

8. Click **Server Groups**.

   The Server Group List page appears.

9. Click the server group name.

10. In the Servers area, click the Switch Simulator server name.

    The Server Details - General page appears.

11. Click **Parameters**.

    The Server Details - Parameters page appears.

12. Enter the parameters for the switch simulator.

    The switch simulator simulates a Nortel Meridian switch. Each Nortel teleset

Parameter	Value
EXTENSION_RANGE_1_BEGIN	Enter the start range for the line 1 agent extensions.
EXTENSION_RANGE_1_END	Enter the end range for the line 1 agent extensions.
EXTENSION_RANGE_2_BEGIN	Enter the start range for the line 2 agent extensions.
EXTENSION_RANGE_2_END	Enter the end range for the line 2 agent extensions.
EXTENSION_RANGE_3_BEGIN	Enter the start range for extensions for the web phone.
EXTENSION_RANGE_3_END	Enter the end range for extensions for the web phone.
ROUTE_POINT_1	Enter a route point.

Parameter	Value
ROUTE_POINT_2	Enter a route point.
ROUTE_POINT_3	Enter a route point
TELE_MIDDLEWARE_CONFIG	The name of the middleware configuration.
TRACE_LEVEL	Enter None.

13. Click **Update**.

See Also

- Section 6.1.1, "Creating a Middleware Defintion for Use with the Switch Simulator"
- Section 6.1.3, "Creating Teleset Configurations"
- Section 6.1.4, "Configuring a Media Screen Pop for Oracle Interaction Center"
- Section 6.1.5, "Configuring Profile Options for Media Work"

6.1.3 Creating Teleset Configurations

Use this procedure to configure telesets for the switch simulator.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

- Implement Oracle Call Center Connectors

Steps

1. Click the Call Center tab.
2. Click **Teleset**.
3. In the Choose Server Group field, select a server group.
4. In the Choose Middleware field, select a server group.

5. Click **Create**.
6. Enter the information for the teleset configuration
   a. In the Teleset Name field, enter the name of the teleset configuration.
   b. In the Hardware Number field, enter a number to identify the teleset hardware.
   c. In the Teleset Type field, select **Nortel**.
   d. In the Server Group Name field, select the server group.
   e. In the Middleware Name field, select the middleware configuration.
   f. Click **Create**.

      The Lines section appears.
7. In the Extension field for Line Index 1, enter a line from the switch simulator parameter values for EXTENSION_RANGE_1.
8. In the Extension field for Line Index 2, enter a line from the switch simulator parameter values for EXTENSION_RANGE_2.
9. Click **Update**.
10. To add another teleset, repeat step2 through step 9.

See Also

- Section 6.1.1, "Creating a Middleware Defintion for Use with the Switch Simulator"
- Section 6.1.2, "Configuring the Interaction Center Server Process Parameters for Use with the Switch Simulator"
- Section 6.1.4, "Configuring a Media Screen Pop for Oracle Interaction Center"
- Section 6.1.5, "Configuring Profile Options for Media Work"

6.1.4 Configuring a Media Screen Pop for Oracle Interaction Center

Classifications (for example, "Gold Support") can be assigned to calls based on the information in the call (for example, the number dialed by the caller). Then, for a specific type of media, the classification is mapped to an application window. When an agent requests delivery of that media type, the mapped business application is launched.

Use this procedure to associate media work with a CRM business application. When a media item is delivered to the Oracle Interaction Center desktop, a CRM business application is launched based on the media type and the media item classification.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Select the Media Actions tab.

   The Media Classification Action Association page appears.

2. In the Media Type field, select Inbound Telephony.

3. Leave the Classification field blank.

   Note: The call classification triggers the media action (screen pop). A blank field in the Classification column is used to indicate the default media action for an unclassified media item.

4. In the Media Action field, select the **Customer Care media function** or **TeleSales Inbound Telephony** function.

   This determines the application that will be launched when a media item of the specified type with the specified classification is selected from a work node.

5. To clear a row, select the Remove checkbox to the left of the media classification action association. Selected rows will be removed when you click **Update**.

6. To save your work, click **Update**.

   The Media Classification Action Association page appears.

7. To delete a media classification action association, select the Remove checkbox to the left of the media type and click **Update**.

See Also

- Section 6.1.1, "Creating a Middleware Defintion for Use with the Switch Simulator"
- Section 6.1.2, "Configuring the Interaction Center Server Process Parameters for Use with the Switch Simulator"
- Section 6.1.3, "Creating Teleset Configurations"
- Section 6.1.5, "Configuring Profile Options for Media Work"

6.1.5 Configuring Profile Options for Media Work

Use this procedure to set system profile options.

Login

Self Service Login URL

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.

Steps

1. In the Navigator window, on the Functions tab, choose **Profile** > **System**.

   The Find System Profile Values window appears. The Site and Profiles with No Values checkboxes are selected by default.

2. Specify the level or levels at which you wish to view or set profile option values.

   - If you want to view or set profile options for all users at the installation site, select the Site box.
   - If you want to view or set profile options for users working under responsibilities owned by a specific application, select the Application box and then select an application from the Application list.
   - If you want to view or set profile options for users working under a specific responsibility, select the Responsibility box and then select a responsibility from the Responsibility list.

- If you want to view or set profile options for a specific user, select the User box and then select a username from the User list.

3. If you want to display profile options both with and without values, select the Profiles with No Values checkbox.
4. If you want to display profile options that include a specific character string, enter the string in the Profile field.

   You may search for profile options using character strings and the wildcard symbol (%). For example, to find profile options prefixed by "IEU", the product code for Oracle Universal Work Queue, enter **IEU%**.
5. Click **Find**.

   The System Profile Values window appears.
6. Set the values for the profile options at one or more levels.

   When a profile option may be set at more than one level, the value entered at the Site level has the lowest priority. The value entered at the Site level is superseded by any value entered at the Application level value and the value entered at the Application level is superseded by any value entered at the Responsibility level. The value entered at the User level has the highest priority and overrides values entered at any other level.

   The following table lists the Oracle Interaction Center profile option values to be used for testing Oracle Interaction Center with media work.

Profile Option	Value
IEU: Blending Style	Not Blended
IEU: Desktop: Network: Proxy Port	Null
IEU: Desktop: Network: Proxy Server	Null
IEU: Desktop: Network: Use Proxy	No
IEU: Desktop: Trace Level	None
IEU: Desktop: UI: Refresh Style	Automatic
IEU: Desktop: UI: Show All Nodes	Yes
IEU: Desktop: UI: Refresh Rate	Null
IEU: Message: UI: UWQ Notice	No
IEU: Optional: Phone Extension	Null

Profile Option	Value
IEU: Queue Order: Advanced Outbound Telephony	Null
IEU: Queue Order: Blended	Null
IEU: Queue Order: Enterprise Tasks	Null
IEU: Queue Order: Escalations	Null
IEU: Queue Order: Forecasts	Null
IEU: Queue Order: Inbound Email	Null
IEU: Queue Order: Inbound Telephony	Null
IEU: Queue Order: Leads	Null
IEU: Queue Order: Media Nodes	Null
IEU: Queue Order: Opportunities	Null
IEU: Queue Order: Outbound Telephony	Null
IEU: Queue Order: Service Requests	Null
IEU: Queue Order: Work List	Null
IEU: Queue: Advanced Outbound Telephony	Null
IEU: Queue Enterprise Tasks	Yes
IEU: Queue: Escalations	Yes
IEU: Queue: Forecasts	Yes
IEU: Queue: Inbound Email	No
IEU: Queue: Inbound Telephony	Yes
IEU: Queue: Leads	Yes
IEU: Queue: Opportunities	Yes
IEU: Queue: Outbound Telephony	No
IEU: Queue: Service Requests	Yes
IEU: Queue: Work List	Yes
IEU: Session History Logging	No

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

Your changes take effect as soon as users sign on or change responsibility.

See Also

- Section 6.1.1, "Creating a Middleware Defintion for Use with the Switch Simulator"
- Section 6.1.2, "Configuring the Interaction Center Server Process Parameters for Use with the Switch Simulator"
- Section 6.1.3, "Creating Teleset Configurations"
- Section 6.1.4, "Configuring a Media Screen Pop for Oracle Interaction Center"

6.2 Implementing the Web Phone for Inbound Call to the Switch Simulator

Topics include:

- Section 6.2.1, "Creating Web Phone User Account"
- Section 6.2.2, "Configuring the Web Phone Profile Options for the Web Phone User"

See Also

- Section 6.1, "Oracle Interaction Center Implementation Verification Tasks"
- Section 6.3, "Testing Advanced Inbound Using the Switch Simulator"

6.2.1 Creating Web Phone User Account

Use this procedure to create an Oracle Applications user account for operating the web phone.

Login

Self Service Login URL

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.

Steps

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

   The Users window appears.

   Use the following guidelines to define Oracle Applications usernames:

   - Use only alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
   - Use only the set of characters that your operating system supports for filenames.

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

   The password is temporary. When the user signs on to Oracle Applications for the first time, the message "Your password has expired" appears and the user is prompted to set a new password.

   Use the following guidelines to define Oracle Applications passwords:

   - Use at least five characters and no more than 100 characters.
   - Use only alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.

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

   The cursor remains in the Password field.

4. Enter the password again to verify it.

5. In the Person field, select an employee to associate with this user account.

6. In the Responsibilities tab, add the following responsibility:

Responsibility	Function	Type
CCT_WEBPHONE_DEMO_RESP	Operate the Web phone to simulate a customer call to the Switch Simulator	HTML

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

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

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

See Also

- Section 6.2.2, "Configuring the Web Phone Profile Options for the Web Phone User"

6.2.2 Configuring the Web Phone Profile Options for the Web Phone User

Use this procedure to set system profile options for the web phone user.

Login

Self Service Login URL

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.

Steps

1. In the Navigator window, on the Functions tab, choose **Profile** > **System**.

   The Find System Profile Values window appears. The Site and Profiles with No Values checkboxes are selected by default.

2. Select the User box and then enter the name of the web phone user.
3. If you want to display profile options both with and without values, select the Profiles with No Values checkbox.
4. If you want to display profile options that include a specific character string, enter the string in the Profile field.

   You may search for profile options using character strings and the wildcard symbol (%). For example, to find web phone profile options, enter **CCT:TOOL%**.

5. Click **Find**.

The System Profile Values window appears.

6. Set the values for the profile options at one or more levels.

   When a profile option may be set at more than one level, the value entered at the Site level has the lowest priority. The value entered at the Site level is superseded by any value entered at the Application level value and the value entered at the Application level is superseded by any value entered at the Responsibility level. The value entered at the User level has the highest priority and overrides values entered at any other level.

   The following table lists the Oracle Interaction Center profile option values to be used for testing Oracle Interaction Center with media work.

Profile Option	Value	Example
CCT:TOOL:SERVER_GROUP	<servergroupname>	servergroup
CCT:TOOL:MW_CONFIG	<middlewareconfigurationname>	servergroup_mw
CCT:TOOL:EXT_START	Enter the EXTENSTION_RANGE_3_ START value from the Switch Simulator configuration.	9001
CCT:TOOL:EXT_END	Enter the EXTENSION_RANGE_3_END value from the Switch Simulator configuration.	9005
CCT:TOOL:DEFAULT_ROUTE_ POINT	Enter a route point.	7720
CCT:TOOL:REFRESH_RATE	This is the refresh rate of the web phone interface in seconds. The default is 5.	5
CCT:TOOL:HIDDEN_DATA	Do not use. The default is No. This profile option is for hidden data passed in the inbound call. It has the format key1=value1,key2=value2.	NA
CCT:TOOL:VISIBLE_ROUTE_ POINT	Do not use.	NA

Profile Option	Value	Example
CCT:TOOL:IVR_DATA	This profile option is for IVR data passed in the inbound call. It has the format k1=v11;v12;v13,k2=v21;v22 In this case v11, v12 and v13 would show is the drop-down list for k1 in the web phone interface. Please make sure the k1,k2 are exactly the same (case sensitive) as the "interaction_key" field in the "CCT_INTERACTION_KEYS" table.	

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

   Your changes take effect as soon as users sign on or change responsibility.

See Also

- Section 6.2.1, "Creating Web Phone User Account"

6.3 Testing Advanced Inbound Using the Switch Simulator

Topics include:

- Section 6.3.1, "Simulating an Inbound Call to the Interaction Center"
- Section 6.3.2, "Handling an Inbound Call in Oracle Interaction Center"

See Also

- Section 6.1, "Oracle Interaction Center Implementation Verification Tasks"
- Section 6.2, "Implementing the Web Phone for Inbound Call to the Switch Simulator"

6.3.1 Simulating an Inbound Call to the Interaction Center

Use this procedure to simulate an inbound call to Oracle Interaction Center.

Note: The Web Phone page refreshes based on the value in the CCT:TOOL:REFRESH_RATE profile option.

Login

HTML Login URL

Responsibility

CCT_WEBPHONE_DEMO_RESP

Prerequisites

- Use Internet Explorer.
- Configure your internet options for web phone use.
  a. Choose **Start** > **Settings** > **Control Panel**.
  b. Double-click **Internet Options**.

     The Internet Properties window appears.
  c. In the Temporary Internet Files area, click **Delete Files**.
  d. In the Delete Files window, select **Delete all offline content** and then click **OK**.
  e. In the Temporary Internet Files area, click **Settings**.
  f. In the Settings window, under Check for newer versions of stored pages, select **Every visit to the page** and then click **OK**.
  g. In the Interaction Properties window, click **OK**.
- If necessary, close *all* Internet Explorer sessions and restart Internet Explorer.
- Start the servers in the interaction center server group (see Section 5.6.5, "Starting Server Processes").

Steps

1. On the Web Phone tab, click **Request Extension**.

   An extension appears starting with the extension defined in the EXTENSION_RANGE_3_BEGIN parameters for the Switch Simulator.
2. Click an extension number.

   A web phone appears.
3. In the web phone, do one of the following:
   - Click Speed Dial to dial the route point defined in the CCT:TOOL:DEFAULT_ROUTE_POINT profile option for the user.

- Enter a route point and then click **Dial**.

  The route point must be defined in the Switch Simulator parameters.

4. To make a call from another web phone extension, click **Request Extension** on the Web Phone tab and then click the new extension.

   When a connection with the Switch Simulator is established, the state of the web phone is Connected and the Line button is green.

5. To hang up, click **Release**.

See Also

- Section 6.3.2, "Handling an Inbound Call in Oracle Interaction Center"

6.3.2 Handling an Inbound Call in Oracle Interaction Center

Use this procedure to handle an inbound call.

Login

Self Service Login URL

Responsibility

Customer Support or TeleSales Agent

Prerequisites

None

Steps

1. Navigate to the Universal Work Queue window.

Responsibility	Procedure
Customer Support	▪ In the Navigator window, on the Functions tab, choose **Universal Work Queue**.
TeleSales Agent	1. In the Navigator window, on the Functions tab, choose **eBusiness Center**. 2. From the **Tools** menu, choose **Universal Work Queue**.

The Universal Work Queue and Phone Extension window appear.

If the following profile options are set to Yes, then the icWork Controller appears:

- IEU: Session History Logging. Enables the Break button in the icWork Controller.
- IEU: Queue: Work List. Enables the Next Work button in the icWork Controller.
- IEU: Message: UI: UWQ Notices. Enables the Notices tab in the icWork Controller.
- IEU: Queue: Inbound Telephony or IEU: Queue: Outbound Telephony. Enables the Phone tab in the icWork Controller.

The icWork Controller is a "floating' window. You can move the icWork Controller window anywhere on your desktop -- even outside the Oracle Applications window.

For information about using the icWork Controller, review *Oracle Universal Work Queue Concepts and Procedures.*

2. In the Phone Extension window, enter the agent extension.

   This is the extension associated with the agent in the interaction center parameters for the CRM resource (see Section 5.7.7, "Configuring Interaction Center Parameters for a CRM Resource").

3. To manually refresh work counts, from the **Tools** menu, choose **Refresh**.

   The left pane of the Oracle Interaction Center window lists the available work nodes and the count, or number, of work items in each node.

4. In the Universal Work Queue window, expand the **Media** node and click **Inbound Telephony**.

   Inbound calls counts are categorized by call classification in the detail pane.

5. To start receiving inbound calls, click a call classification and then click **Get Work**.

   The appropriate application window opens and displays the details of the work item. The Phone tab in icWork Controller displays the following information:

   - ANI
   - DNIS
   - Call classification

- Elapsed time
- Softphone state (for example, Call established)
- Media channel (for example, Inbound Telephony)

6. To end the call and complete your work in the current interaction:
   a. Click **Release** on the softphone to hang up the call.
   b. Click **Wrap Up** in the application window.
   c. Complete your work.
7. To end the interaction and request another call of the same classification:
   a. Click **End Interaction** in the application window.
   b. Select a call outcome.

   Note: You do not have to click **Next Call** in the icWork Controller.

   You are now ready to receive inbound calls of the same classification.
8. To end the interaction and suspend call delivery:
   a. Click **Cancel Media Request** in the Universal Work Queue window or **Cancel** in the icWork Controller.
   b. Click **End Interaction** in the application window.
   c. Select a call outcome.

   Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

9. To request calls of a different classification:
   a. Click **Cancel Media Request** in the Universal Work Queue window or **Cancel** in the icWork Controller.
   b. Click **End Interaction** in the application window.
   c. Select a call outcome.

Note: If a call is already on its way to you when you suspend call delivery, then you will receive one last call before your call delivery is suspended.

d. Click a different call classification and then click **Get Work** in the Universal Work Queue window.

See Also

- Section 6.3.1, "Simulating an Inbound Call to the Interaction Center"

7

Diagnostics and Troubleshooting

7.1 Common Implementation Errors

This document describes some installing, configuring, and troubleshooting Interaction Center Server processes.

7.1.1 NT Service : UNC network path

ICSM would not work as an NT Service if apps.zip is located via a mapped network drive.

Steps

To correctly set up ICSM as an NT service :

10. Use UNC Style network path to point to the location of apps.zip (IEO_JAVA_TOP) : \\host\path. e.g. \\cctre1-nt1\appl_top.
11. Modify the service to run with a NT User who have access to the network path. This can be done using NT Service Manager.

The reason behind this is that NT services are not associated with the login session, of which the network drive mapping are tightly coupled; thus mapped network drive are not accessible from NT service at all, which will result in ICSM not able to start (Some No Class Def Found Errors may be observed).

7.1.2 NT service : Permission

ICSM NT service required to be run with System Administrator privileges. Assign the ICSM NT service with the correct user using the NT service manager.

7.1.3 NT service : Changing ieoenv.cmd

If ieoenv.cmd is changed, the ICSM NT Service must be unregistered and registered again, otherwise the change in ieoenv.cmd will not be effective. The tool oamksvc.exe created by the FND team save a snapshot of the environment variables in the NT registry. When the service is registered, the environment variable values cannot be changed. Unregistering and Reregistering the ICSM NT service will take the latest values in ieoenv.cmd.

7.1.4 NT : Running in console mode

When ICSM is running in console mode (by using ieoicsm.cmd console_start), all server processes launched by ICSM will be killed when the ICSM process is killed (either by control-C or killed from Task Manager). This would not happen if ICSM is shut down gracefully using the ICSM command line utility.

7.1.5 Default options

By default, ICSM will start all the server processes assigned to it when it is started and the log level is set to ERROR. To change these options, the ieoicsm.cmd / ieoicsm.sh must be edited. To turn off the start all option, remove -start_all from the Java command line in ieoicsm.cmd / ieoicsm.sh. To change the logging level, add -log_level {ERROR|WARNING|INFO|VERBOSE} to the Java command line in ieoicsm.cmd / ieoicsm.sh.

Before and After applying patch ICSM must be shutdown before applying any patch affecting apps.zip and restarted when the patching is finished.

7.1.6 Java version : Running with JDK/JRE 1.1.8

If the Java version is 1.1.8, the line with "jdbc12.zip" must be commented out or removed from ieoenv.cmd or ieoenv.sh. Otherwise, the wrong JDBC driver will be used which is incompatible with Java 1.1.8.

7.1.7 UNIX : File descriptor limit

The default maximum number of file descriptors available to the shell and its child processes on most Unix systems is 64. Raise this number to 1024 in order to run all the java servers for a single site installation, or any subset of the java servers for a single site installation, on the same node. A higher number will be required if java servers for multiple single site installations will be run on the same node.

Only a process with appropriate privileges (usually root) can increase the limit. The command required to change the number varies with the flavor of Unix used. Please consult your Unix System Administrator.

An example for the Korn shell is shown below:

1. Open a unix terminal in the machine where ICSM is going to be started.
2. Change user to be root.
3. Change shell to be korn shell ksh.
4. Increase the file descriptor limit to 1024 /usr/bin/ulimit -n 1024.
5. Start ICSM in this terminal To check the current file descriptor limit, type /usr/bin/ulimit -n.

7.1.8 HP-UX : Default Thread Configuration

The default number of thread allowed in HP-UX platform is 64. This has to be raised to at least 2048 to be able to support ICSM and all interaction center Java processes. Consult the HP-UX tuning documentation for more details.

7.2 Log Files and Error Messages

Oracle Interaction Center server trace function outputs detailed information about server activity to a console window or a file. By default, the trace function is off.

To turn on the trace function, set the appropriate Oracle Interaction Center server database parameters. Optionally, when you start the Oracle Interaction Center server, use the appropriate command line parameters. The database parameter overrides the command line parameter.

The following command line options set the trace level for the Oracle Interaction Center server.

Trace Level	Description
trace_level_error	Server errors.
trace_level_warn	Server warnings and errors.
trace_level_info	Server events, warning, and errors.
trace_level_debug	All server activity.

The Oracle Interaction Center server does not support enabling or changing trace levels at runtime. You must stop and restart the server for changes take place.

See Also

- Section 7.1, "Common Implementation Errors"

7.3 Failure and Recovery

7.3.1 ICSM goes down

Failure

a. When ICSM is down you will not be able to start/stop individual servers.

b. If ICSM is started as an NT service or via the ICSM shell script on Unix, all servers that are running will not be affected. All servers will continue operation as usual.

Recovery

a. Restart ICSM.

b. All servers will re-connect to ICSM within 5 minutes.

c. After 5 minutes you will be able to start and stop servers.

7.3.2 Database goes down.

Failure

a. When the database is down you will not be able to start/stop individual servers.

b. All servers will not be able to continue operation as usual but will go into an intermediate state waiting for the database to come up.

Recovery

a. Restart the database.

b. ICSM will detect that the database has come up and reconnect to it.

c. Servers will detect that the database has come up and reconnect to it.

d. You can continue operation as usual 5 minutes after the database has come up.

A

Oracle Interaction Center Implementation Worksheets

Topics include:

A.1 Oracle Interaction Center Administrator Worksheet

User Name:

Password:

Responsibilities:

❑ System Administrator

- ❏ CRM Resource Manager
- ❏ HRMS Manager, for example US HRMS Manager (if Oracle Human Resource Management System is installed)
- ❏ Call Center HTML Administrator

A.2 Interaction Center Database Connectivity File Worksheet

Parameter	Value
TWO_TASK	
FNDNAM	
GWYUID	
GUEST_USER_PWD	
APPS_JDBC_DRIVER	
DB_HOST	
DB_PORT	

A.3 Interaction Center Server Manager Environment File Worksheet

Parameter	Value
IEO_COMM_TOP	
IEO_DBC_FILE	
IEO_JRE	
IEO_JAVA_TOP	
IEO_IP	
IEO_HOST	

A.4 Employee Worksheet

Last:

Gender:

Type: Employee

Enployee (Number):

A.5 Employee User Account Worksheet

User Name:

Password:

Person (Employee):

Responsibilities:

- ❏ Preferences (to access personal profile options for Oracle Interaction Center)
- ❏ Customer Support (to access work in Oracle Universal Work Queue)
- ❏ TeleSales Agent (to access work in Oracle Universal Work Queue)

A.6 CRM Resource Worksheet

Name (Employee):

Resource Name (if different):

Transaction Number:

Resource Number:

See Also

- Section A.6.1, "CRM Resource Roles Worksheet"
- Section A.6.2, "CRM Resource Interaction Center Parameters Worksheet"
- Section A.6.3, "CRM Group Member Roles and Usage Worksheet"

A.6.1 CRM Resource Roles Worksheet

Resource Roles:

Role Type	Role	Start Date	End Date
Telesales			
Callcenter			

Role Type	Role	Start Date	End Date

A.6.2 CRM Resource Interaction Center Parameters Worksheet

Interaction Center:

Middleware:

Agent Middleware Parameters:

Parameter	Value
ACD Data 1	
ACD Data 2	

A.6.3 CRM Group Member Roles and Usage Worksheet

Group Number:

Group Name:

Group Member Roles:

Role Type	Role	Start Date	End Date
Telesales			
Callcenter			

Group Usages:

- ❏ Sales and Telesales
- ❏ Call Center

A.7 Single-Site Server Group Worksheet

Server Group Name:

Location:

Description:

Server Type	Server Name	Node Assignment
Interaction Queueing and Distribution		
Inbound Telephony Server		
Routing Server		
Telephony Manager		
Switch Simulator		
Universal Work Queue		

A.8 Multi-Site Interaction Center Worksheets for Advanced Inbound

Topics include:

- Section A.8.1, "Global Server Group Worksheet"
- Section A.8.2, "Local Server Group Worksheet"

A.8.1 Global Server Group Worksheet

Server Group Name:

Location:

Description:

Server Type	Server Name	Node Assignment
Interaction Queueing and Distribution		
Routing Server		

A.8.2 Local Server Group Worksheet

Server Group Name:

Location:

Description:

Server Type	Server Name	Node Assignment
Inbound Telephony Server		
Telephony Manager		
Switch Simulator		
Universal Work Queue		

A.9 Middleware Configuration Worksheet

Server Group:

Middleware Configuration Name:

IP Address:

Port:

Middleware Type

- ❏ Connectors for CT-Connect
- ❏ Connectors for Cisco ICM

Parameter	Value
PBX Name	
PBX Type	
Route Point Set 1	
Route Point Set 2	
Route Point Set 3	
Route Point Set 4	
Route Point Set 5	
CTI Enabler Server IP Address	
Middleware Server Info 1	
Middleware Server Info 2	
Middleware Server Info 3	

Parameter	Value
Middleware Server Info 4	
Middleware Server Info 5	
Middleware Server Info 6	
Outgoing Prefix	
International Dialing Prefix	
Site Area Code	
Site Country Code	
Site Internal Number Length	
Site Local Number Maximum Length	
Site Overlay	
IVR Host	
IVR Port	
IVR Info 1	
IVR Info 2	
IVR Info 3	
IVRI Mode	
IVRI Abandon Threshold	
Domestic Dialing Prefix	
Passive Mode	
Use Advanced Outbound	
Predictive Transfer Flag	
Predictive Transfer Wait Time	
Predictive Answer Flag	
Predictive Answer Wait Time	

A.10 Server Parameters Worksheet

Topics include:

A.10.1 Interaction Queueing and Distribution Parameters

Server Name:

Node Assignment:

Parameter	Value
DATABASE_LOGGING	
DEFAULT_TIMEOUT	
IH_JDBC_CONNECTIONS	
JDBC_CONNECTIONS	
TRACE_LEVEL	

A.10.2 Telephony Manager Parameters

Server Name:

Node Assignment:

No parameters.

A.10.3 Inbound Telephony Server Parameters

Server Name:

Node Assignment:

Parameter	Value
DATABASE_LOGGING	
TELE_MIDDLEWARE_CONFIG	
TRACE_LEVEL	

Parameter	Value
WEB_CALL_PORT	

A.10.4 Routing Server Parameters

Server Name:

Node Assignment:

Parameter	Value
TRACE_LEVEL	

A.10.5 Switch Simulator Parameters

Server Name:

Node Assignment:

Parameter	Value
EXTENSION_RANGE_1_BEGIN	
EXTENSION_RANGE_1_END	
EXTENSION_RANGE_2_BEGIN	
EXTENSION_RANGE_2_END	
EXTENSION_RANGE_3_BEGIN	
EXTENSION_RANGE_3_END	
ROUTE_POINT_1	
ROUTE_POINT_2	
ROUTE_POINT_3	
TELE_MIDDLEWARE_CONFIG	
TRACE_LEVEL	

A.10.6 Universal Work Queue Parameters

Server Name:

Node Assignment:

Parameter	Value
ENABLE_INTERACTION_BLENDING	
ENABLE_LOGGING_AND_ALERTING	
LNA_SPILLOVER_FILE	
LOAD_CALC_RATE	
MAX_ACTIVE_DB_CONNECTIONS	
MAX_TIMEOUT_DURATION	
MCM_TIMEOUT_DURATION	
NETWORK_OBJECT_NUMBER	
NETWORK_TRACE	
NETWORK_TRACE_FILE	
NETWORK_TRACE_LEVEL	
NETWORK_USER_NUMBER	
RECONN_WAIT_TIME	
RUN_AO_IN_SIMULATION	
SERVER_PORT	
SESSION_CLOSE_DELAY	
SESSION_TIMEOUT	
TIMEOUT_WAIT_TIME	
TRACE_FILE_NAME	
TRACE_LEVEL	
USE_AOLJ	

A.11 Teleset Worksheet

Teleset Name:

Hardware Number:

Teleset Type

- ❑ Alcatel

- ❑ Aspect
- ❑ Cisco
- ❑ Ericcson
- ❑ Lucent
- ❑ Nortel
- ❑ Rockwell
- ❑ Siemens

Server Group Name:

Middleware Name:

B

Oracle Interaction Center Server Parameters

The following table lists and defines the parameter names for which values can be set for Oracle Interaction Center servers. The following Oracle Interaction Center server parameters are loaded from the database. Database parameters override any command line parameters passed to the Oracle Interaction Center server. These parameters are strings when stored in the database.

Topics include:

B.1 Oracle Telephony Manager

JDBC_CONNECTIONS
Specify number of JDBC connections used by Telephony Manager server.

Default value = 3. Recommended range for this parameter is from 3-15. Higher value improves the real time performance of the OTM server process but uses more CPU and memory.

IH_JDBC_CONNECTIONS
Specify number of JDBC connections used by Telephony Manager for saving interaction history records to the database.

Default value = 1. Recommended range for this parameter is from 1-5. Higher value causes faster updates of interaction history data but uses more CPU and memory.

TRACE_LEVEL
Specify the type of messages logged to the trace file.

Possible values are {fatal, error, warning, info, verbose}.

Default trace level is error level messages only.

DATABASE_LOGGING
Possible values are {true, false}.

Default is false.

When database logging is turned on {true}, exceptions and error level messages are logged to the database and can be viewed in the Log Viewer page. Use database logging as a diagnostic tool only as logging will affect the performance of the system.

B.2 Oracle Interaction Queuing and Distribution

DEFAULT_TIMEOUT
This is the maximum amount of time in minutes the call waits in IQD. If the call is not picked up by an agent within the time specified in DEFAULT_TIMEOUT, the media item is sent to the Routing server to be re-routed. If a value less than 1 minute is specified here, it will be ignored.

Default value is INFINITE meaning that the call is not sent for re-routing and will wait till it is picked up by an agent.

JDBC_CONNECTIONS
Specify number of jdbc connections used by IQD.

Default value = 3. Recommended range for this parameter is from 3-15. Higher value improves the real time performance of the IQD server process but uses more CPU.

IH_JDBC_CONNECTIONS
Specify number of jdbc connections used by IQD for saving interaction history records to the database.

Default value = 1. Recommended range for this parameter is from 1-5. Higher value causes faster updates of interaction history data but uses more CPU.

TRACE_LEVEL
Specify the type of messages logged to the trace file.

Possible values are {fatal, error, warning, info, verbose}.

Default trace level is error level messages only.

DATABASE_LOGGING
Possible values are {true, false}.

Default is false.

When database logging is turned on {true}, exceptions and error level messages are logged to the database and can be viewed in the Log Viewer page. Use database logging as a diagnostic tool only as logging will affect the performance of the system.

B.3 Oracle Inbound Telephony Server

TELE_MIDDLEWARE_CONFIG
The name of the middleware configuration.

TRACE_LEVEL
Specify the type of messages logged to the trace file.

Possible values are {fatal, error, warning, info, verbose}.

Default trace level is error level messages only.

DATABASE_LOGGING
Possible values are {true, false}.

Default is false.

When database logging is turned on {true}, exceptions and error level messages are logged to the database and can be viewed in the Log Viewer page. Use database logging as a diagnostic tool only as logging will affect the performance of the system.

WEB_CALL_PORT
Obsolete

B.4 Oracle Routing Server

TRACE_LEVEL
Specify the type of messages logged to the trace file.

Possible values are {fatal, error, warning, info, verbose}.

Default trace level is error level messages only.

B.5 Oracle Switch Simulator

The switch simulator simulates a Nortel Meridian switch.

EXTENSION_RANGE_1_BEGIN
Specify beginning of your virtual extension range for line 1 of each teleset.

EXTENSION_RANGE_1_END
Specify end of your virtual extension range for line 1 of each teleset.

EXTENSION_RANGE_2_BEGIN
Specify beginning of your virtual extension range for line 2 of each teleset.

EXTENSION_RANGE_2_END
Specify end of your virtual extension range for line 2 of each teleset.

EXTENSION_RANGE_3_BEGIN
Specify beginning of your virtual extension range for the web phone.

EXTENSION_RANGE_3_END
Specify end of your virtual extension range for the web phone.

ROUTE_POINT_1
Specify a route point number.

ROUTE_POINT_2
Specify a route point number.

ROUTE_POINT_3
Specify a route point number.

TELE_MIDDLEWARE_CONFIG
Specify the name of the middleware configuration

TRACE_LEVEL
Specify the type of messages logged to the trace file.

Possible values are {fatal, error, warning, info, verbose}.

Default trace level is error level messages only.

C

Oracle Interaction Center Command Line Parameters

The following table lists and defines the parameters that can be set using the Oracle Interaction Center server command line:

ieoicsm cmd

C.1 Starting Interaction Center Servers

C.1.1 ieoicsm start

Start Interaction Center Server Manager.

C.1.2 ieoicsm start -start_all {true|false}

Start all server processes assigned to the node.

true - Starts all server processes when Interaction Center Server Manager is started.

false - Does not start all server processes when Interaction Center Server Manager is started.

Default: true

C.1.3 ieoicsm start -start_default_config {true|false}

Start the default server group configuration, if it exists.

true - Starts the default configuration when Interaction Center Server Manager is started.

false - Does not start the default configuration when Interaction Center Server Manager is started.

Default: false

C.1.4 ieoicsm console_start

(Windows NT only) Start Interaction Center Server Manager in console mode.

C.1.5 ieoicsm console_start -start_all {true|false}

(Windows NT only) Start all server processes assigned to the node.

true - Starts all server processes when Interaction Center Server Manager is started.

false - Does not start all server processes when Interaction Center Server Manager is started.

Default: true

C.1.6 ieoicsm console_start -start_default_config {true|false}

(Windows NT only) Start the default server group configuration, if it exists.

true - Starts the default configuration when Interaction Center Server Manager is started.

false - Does not start the default configuration when Interaction Center Server Manager is started.

Default: false

C.2 Stopping Interaction Center Servers

C.2.1 ieoicsm stop

Stop Interaction Center Server Manager.

C.2.2 ieoicsm stop -kill ip_address

Stop Interaction Center Server Manager at the specified IP address.

C.2.3 ieoicsm stop -stop_all {true|false}

Stop all server processes on the node and Interaction Center Server Manager.

true - Stop all server processes when Interaction Center Server Manager is stopped.

false - Does not stop all server processes when Interaction Center Server Manager is stopped.

Default: false

C.3 Interaction Center Server Manager Command Line Utility

Use the Interaction Center Server Manager command line utility to start, stop, and monitor Interaction center server from the command line.To start the Interaction Center Server Manager command line utility, run:

```
ieoicsm cmd
```

Once started, you can invoke the following commands.

C.3.1 start <serverName>

Description: Start a server.

Parameters: serverName - name of the server

C.3.2 stop <serverName>

Description: Stop a server.

Parameters: serverName - name of the server

C.3.3 status <serverName>

Description: Report whether a server is up or down.

Parameters: serverName - name of the server

C.3.4 assign <serverName> <ipAddress>

Description: Assign a server to a node.

Parameters:

serverName - name of the server

ipAddress - the IP address of the machine that the server is to be run

C.3.5 quit

Description: Quit the command line utility