

Oracle® Applications

Interaction Center Concepts and Procedures

Release 11*i*

October 2001

Part No. A95159-01

ORACLE®

Copyright © 2001, Oracle Corporation. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent and other intellectual and industrial property laws. Reverse engineering, disassembly or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

Restricted Rights Notice Programs delivered subject to the DOD FAR Supplement are "commercial computer software" and use, duplication, and disclosure of the Programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement. Otherwise, Programs delivered subject to the Federal Acquisition Regulations are "restricted computer software" and use, duplication, and disclosure of the Programs shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software - Restricted Rights (June, 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and Oracle Corporation disclaims liability for any damages caused by such use of the Programs.

Oracle is a registered trademark of Oracle Corporation. Other names may be trademarks of their respective owners.

Contents

Send Us Your Comments	v
Preface	vii
Audience for This Guide	vii
How To Use This Guide	vii
Documentation Accessibility	viii
Other Information Sources	viii
Do Not Use Database Tools to Modify Oracle Applications Data	xiii
About Oracle	xiii
1 Understanding Oracle Interaction Centers	
2 Configuring Oracle Interaction Centers	
2.1 Configuring Interaction Center Nodes	2-1
2.1.1 Listing Interaction Center Nodes.....	2-2
2.1.2 Adding an Additional Node IP Address.....	2-2
2.2 Configuring Interaction Center Sites.....	2-3
2.2.1 Creating a Global Site for a Multi-Site Interaction Center	2-4
2.2.2 Creating a Local Site for a Multi-Site Interaction Center	2-5
2.2.3 Creating a Single-Site Interaction Center	2-7
2.2.4 Adding a Server Process to an Interaction Center Server Group	2-9
2.2.5 Specifying an IP Address for a Server Process	2-11
2.3 Modifying an Interaction Center Configuration.....	2-12
2.3.1 Listing Interaction Center Server Groups.....	2-12

2.3.2	Modifying Interaction Center Server Group Details.....	2-13
2.3.3	Modifying Interaction Center Server Process Details.....	2-15
2.3.4	Assigning a Different Node to a Server Process.....	2-17
2.3.5	Assigning Servers to a Node.....	2-18
2.3.6	Removing a Local Site from a Multi-Site Interaction Center.....	2-19
2.3.7	Removing a Server Process from an Interaction Center Server Group.....	2-20
2.3.8	Removing an Interaction Center Server Group.....	2-22
2.3.9	Removing a Server Process from an Interaction Center Node.....	2-23
2.3.10	Removing an Interaction Center Node.....	2-24

3 Administering Oracle Interaction Centers

3.1	Starting or Stopping All Server Processes in a Server Group.....	3-1
3.2	Starting or Stopping a Server Process in a Server Group.....	3-2
3.3	Starting or Stopping a Server Process on a Node.....	3-4
3.4	Viewing the Logs for an Interaction Center Server Process.....	3-5

4 Configuring Oracle Interaction Center Users

4.1	Understanding Interaction Center Responsibilities.....	4-2
4.2	Defining an Interaction Center Administrator.....	4-2
4.3	Defining an Interaction Center Agent.....	4-3
4.3.1	Creating an Employee in Oracle Human Resource Management Systems.....	4-4
4.3.2	Creating an Employee in CRM Resource Manager.....	4-6
4.3.3	Creating an Oracle Applications User Account for an Employee.....	4-7
4.3.4	Configuring Profile Options.....	4-9
4.3.5	Creating a CRM Resource for an Employee.....	4-11
4.3.6	Configuring Interaction Center Roles for a CRM Resource.....	4-12
4.3.7	Configuring Interaction Center Parameters for a CRM Resource.....	4-14

Send Us Your Comments

Oracle Applications Interaction Center Concepts and Procedures, Release 11*i*

Part No. A95159-01

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

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:
Oracle Corporation
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 Concepts and Procedures.

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

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

If you have never used Interaction Center Server Manager, 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 Interaction Center Server Manager.

- [Chapter 1, "Understanding Oracle Interaction Centers"](#), provides overviews of the application and its components, explanations of key concepts, features, and functions.

- [Chapter 2, "Configuring Oracle Interaction Centers"](#), provides process-oriented, task-based procedures for configuring interaction center server groups.
- [Chapter 3, "Administering Oracle Interaction Centers"](#), provides process-oriented, task-based procedures for administering interaction center server groups.
- [Chapter 4, "Configuring Oracle Interaction Center Users"](#), provides process-oriented, task-based procedures for configuring interaction center users.

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 Interaction Center Server Manager.

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

Interaction Center Server Manager 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 Interaction Center Server Manager.

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 Interaction Center Server Manager (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 Advanced Inbound Implementation Guide

Use this guide to administer the inbound media setup for an interaction center.

Oracle Advanced Outbound Implementation Guide

Use this guide to administer the outbound media setup for an interaction center.

Oracle Interaction Center Implementation Guide

Use this guide to implement Interaction Center Server Manager.

Oracle Scripting Implementation Guide

Use this guide to use and administer Oracle Scripting.

Oracle Interaction Center Intelligence Implementation Guide

Use this guide to use and administer 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 6i 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 Interaction Center Server Manager 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 Interaction Center Server Manager 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 Oracle8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink 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 OracleMetaLink, 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 OracleMetaLink 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.

Understanding Oracle Interaction Centers

An Oracle interaction center is a logical grouping of interaction center processes or server. The types of servers in your interaction center will depend on the type of media that your interaction center is processing.

The following table describes the different interaction center server processes in an interaction center server group.

Server Process	Description
Interaction Queueing and Distribution	The Interaction Queueing and Distribution server process handles the queueing and distribution of media item in the interaction center.
Inbound Telephony	The Inbound Telephony server process monitors and forwards inbound telephony and web callback requests to Telephony Manager
Routing	The Routing server process routes media items to agents or agent groups based on the media classification and routing rules.
Telephony Manager	The Telephony Manager server process
Universal Work Queue	The Universal Work Queue server process delivers media items to the agent desktop.
Interaction Blending	The Interaction Blending server process dynamically assigns agents to handle various media types based on media volume and service levels.
Advanced Outbound Dial	The Advanced Outbound Dial server process places progressive and predictive outbound telephone calls and communicates with the agent desktop via the Universal Work Queue server process.

Interaction Center Server Manager, which resides on the target machine, is responsible for starting, stopping and monitoring interaction center server processes. The server processes are controlled by the Interaction Center Server Manager from an administration interaction in Oracle Applications. A command line interface to Interaction Center Server Manager, that provides a subset of the commands available via administration interface, is also provided.

See Also

- [Chapter 2, "Configuring Oracle Interaction Centers"](#)
- [Chapter 3, "Administering Oracle Interaction Centers"](#)
- [Chapter 4, "Configuring Oracle Interaction Center Users"](#)
-

Configuring Oracle Interaction Centers

Topics include:

- [Section 2.1, "Configuring Interaction Center Nodes"](#)
- [Section 2.2, "Configuring Interaction Center Sites"](#)
- [Section 2.3, "Modifying an Interaction Center Configuration"](#)

See Also

- [Chapter 1, "Understanding Oracle Interaction Centers"](#)
- [Chapter 3, "Administering Oracle Interaction Centers"](#)
- [Chapter 4, "Configuring Oracle Interaction Center Users"](#)

2.1 Configuring Interaction Center Nodes

A node is a machine on which an interaction center server process is run. In a single-node installation of an Oracle interaction center, all server processes are run on one machine. In a multi-node installation of an Oracle interaction center, server processes are run on multiple machines.

Before you configure your interaction center, Interaction Center Server Manager must be installed and implemented on each node in your interaction center. For more information, see *Oracle Interaction Center Implementation Guide*.

Topics include:

- [Section 2.1.1, "Listing Interaction Center Nodes"](#)
- [Section 2.1.2, "Adding an Additional Node IP Address"](#)

See Also

- [Section 2.2, "Configuring Interaction Center Sites"](#)
- [Section 2.3, "Modifying an Interaction Center Configuration"](#)

2.1.1 Listing Interaction Center Nodes

A node is a machine on which an interaction center server process is run. Use this procedure to list the interaction center nodes.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Nodes tab.

The Node List page appears. The Node List page lists the names of all machines that have Interaction Center Server Manager running.

3. Optionally, click a node name to view a list of server processes assigned to the node.

See Also

- [Section 2.1.2, "Adding an Additional Node IP Address"](#)

2.1.2 Adding an Additional Node IP Address

Interaction Center Server Manager uses an IP address to communicate with target machines. A target machine may have more than one IP address. Use this procedure to add additional IP addresses to the list of IP addresses for the node.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Nodes tab.

The Node List page appears. The Node List page lists the names of all machines that have Interaction Center Server Manager running.

3. Click a node name.

The Node Details page appears. The Node Details page lists the server processes assigned to the node.

4. Click **Advanced**.

5. In the Add a new IP 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 2.1.1, "Listing Interaction Center Nodes"](#)

2.2 Configuring Interaction Center Sites

Topics include:

- [Section 2.2.1, "Creating a Global Site for a Multi-Site Interaction Center"](#)
- [Section 2.2.2, "Creating a Local Site for a Multi-Site Interaction Center"](#)
- [Section 2.2.3, "Creating a Single-Site Interaction Center"](#)
- [Section 2.2.4, "Adding a Server Process to an Interaction Center Server Group"](#)
- [Section 2.2.5, "Specifying an IP Address for a Server Process"](#)

See Also

- [Section 2.1, "Configuring Interaction Center Nodes"](#)
- [Section 2.3, "Modifying an Interaction Center Configuration"](#)

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

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

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

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.
- e. In the Default Node field, select the default machine for the interaction center server processes in the server group.
- f. In the Server Configuration field, select the configuration type.

5. Click **Submit**.

If the server configuration is None, then the server group is created and the Server Group Details page is refreshed. There are no server processes in the server group.

If the server configuration is Typical, then the server group is created with a default set of server processes and the Server Group Details page is refreshed.

If the server configuration is custom, then the Server page appear.

6. Enter the general details about the server.
7. Click **Update**.

The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

See Also

- [Section 2.2.2, "Creating a Local Site for a Multi-Site Interaction Center"](#)
- [Section 2.2.3, "Creating a Single-Site Interaction Center"](#)
- [Section 2.2.4, "Adding a Server Process to an Interaction Center Server Group"](#)
- [Section 2.2.5, "Specifying an IP Address for a Server Process"](#)

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

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

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Click the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

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 global server group for the multi-site interaction center.
- e.** In the Default Node field, select the default machine for the interaction center server processes in the server group.
- f.** In the Server Configuration field, select the configuration type.

5. Click Submit.

If the server configuration is None, then the server group is created and the Server Group Details page is refreshed. There are no server processes in the server group.

If the server configuration is Typical, then the server group is created with a default set of server processes and the Server Group Details page is refreshed.

If the server configuration is custom, then the Server page appear.

6. Enter the general details about the server.

7. Click Update.

The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

See Also

- [Section 2.2.1, "Creating a Global Site for a Multi-Site Interaction Center"](#)
- [Section 2.2.3, "Creating a Single-Site Interaction Center"](#)
- [Section 2.2.4, "Adding a Server Process to an Interaction Center Server Group"](#)
- [Section 2.2.5, "Specifying an IP Address for a Server Process"](#)

2.2.3 Creating a Single-Site Interaction Center

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

Use this procedure to create a server group for a single-site Oracle interaction center.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

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 default machine for the interaction center server processes in the server group.
 - f. In the Server Configuration field, select a configuration type for creation of the server group.

5. Click **Submit**.

If the server configuration is None, then the server group is created and the Server Group Details page is refreshed. There are no server processes in the server group.

If the server configuration is Typical, then the server group is created with a default set of server processes and the Server Group Details page is refreshed.

If the server configuration is custom, then the Server page appear.

6. Enter the general details about the server.
7. Click **Update**.

See Also

- [Section 2.2.1, "Creating a Global Site for a Multi-Site Interaction Center"](#)
- [Section 2.2.2, "Creating a Local Site for a Multi-Site Interaction Center"](#)
- [Section 2.2.4, "Adding a Server Process to an Interaction Center Server Group"](#)
- [Section 2.2.5, "Specifying an IP Address for a Server Process"](#)

2.2.4 Adding a Server Process to an Interaction Center Server Group

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

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Click a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

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. From the Type Name list, select the server type.
 - c. Optionally, in the Location field, enter the location of the server.
 - d. Optionally, in the Description field, enter a description of the server.
 - e. From the Member Server Group list, select a server group for the server process.

2.2.5 Specifying an IP Address for a Server Process

A machine running an interaction center server process may have more than one IP address. Use this procedure to specify the IP address for a server process.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Nodes tab.

The Node List page appears. The Node List page lists the names of all machines that have Interaction Center Server Manager running.

3. Click a node name.

The Node Details page appears. The Node Details page lists the server processes assigned to the node.

4. In the IP Address column, do one of the following:

- Leave the IP Address field blank.

The Interaction Center Server Manager will load balance communications with the target machine between the available IP addresses for the machine. 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, the target machine communicates using the selected IP address.

5. Click **Update**.

The Node Details page is refreshed.

See Also

- [Section 2.2.1, "Creating a Global Site for a Multi-Site Interaction Center"](#)

- [Section 2.2.2, "Creating a Local Site for a Multi-Site Interaction Center"](#)
- [Section 2.2.3, "Creating a Single-Site Interaction Center"](#)
- [Section 2.2.4, "Adding a Server Process to an Interaction Center Server Group"](#)

2.3 Modifying an Interaction Center Configuration

Topics include:

- [Section 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

See Also

- [Section 2.1, "Configuring Interaction Center Nodes"](#)
- [Section 2.2, "Configuring Interaction Center Sites"](#)

2.3.1 Listing Interaction Center Server Groups

Use this procedure to list the interaction center server groups.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Optionally, click the server group name to view the details of a server group.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

See Also

- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.2 Modifying Interaction Center Server Group Details

Use this procedure to modify the general details about an interaction center server group.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Click a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

4. Modify the details about the server group.

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

This field is for informational purposes only.

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

This field is for informational purposes only.

- c. Optionally, in the Super Group field, select the global server group for the multi-site interaction center.

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

5. Select **Update** and then click **Submit**.

The server group is updated and the Server Group Details page is refreshed.

See Also

- [Section 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)

- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.3 Modifying Interaction Center Server Process Details

Use this procedure to modify a server in an Oracle interaction center server group.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Click a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

4. In the Servers area, click a server name.

The Server Details - General page appears.

5. Enter the general details about the server.
 - a. Optionally, in the Location field, enter the location of the server.
 - b. Optionally, in the Description field, enter a description of the server.
 - c. 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.

- d. 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. If you want to use a parameter, enter the value in the Value field.
 - b. If you do not want to use a parameter, leave the Value field blank.
 - c. 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 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)

- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.4 Assigning a Different Node to a Server Process

Use this procedure to assign the machine on which the interaction center server process will run.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Click a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

4. In the Server area, in the Node column, select a machine for the server.

5. Click **Update**.

The server process is updated and the Server Group Details page is refreshed.

See Also

- [Section 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.5 Assigning Servers to a Node

Interaction center servers can run on any node that is running the ICSM server.

Prerequisites

None

Steps

1. Click the Nodes tab.
2. Click the node name.
3. Click Assignments.
4. Select a Server Group from the Server Group pick list.
5. Select a servers from the selected server group that are to be assigned to this node from the Available Servers list.
6. Click the left arrow button to add the servers to the list of servers assigned to the node.
7. Click **Update** to save your changes.

8. To removing servers assigned to a node, select servers to be removed from the Assigned Servers list and click the right arrow button to remove the servers from the list of servers assigned to the node.

See Also

- [Section 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.6 Removing a Local Site from a Multi-Site Interaction Center

Use this procedure to remove a local server group from a global server group for a multi-site interaction center.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers,

local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Click the name of the local server group that you want to remove from the global server group.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. Any servers in the server group are listed in the Servers area.

4. In the Super Group field, select the blank item.

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

5. Select **Update** and then click **Submit**.

The server group is updated and the Server Group Details page is refreshed.

See Also

- [Section 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.7 Removing a Server Process from an Interaction Center Server Group

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

Prerequisites

- Define an Interaction Center Server Manager Administrator.
- Stop the server process if it is running.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Click a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

4. In the Servers area, select the Remove checkbox to the left of the server 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 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)

- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.8 Removing an Interaction Center Server Group

Use this procedure to remove an interaction center server group.

Prerequisites

- Define an Interaction Center Server Manager Administrator.
- Stop any server processes that are running in the server group.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Select the Remove checkbox to the left of 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 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)

- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.9 Removing a Server Process from an Interaction Center 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.

Prerequisites

- Define an Interaction Center Server Manager Administrator.
- Stop the server process if it is running.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Nodes tab.

The Node List page appears. The Node List page lists the names of all machines that have Interaction Center Server Manager running.

If a machine is not listed, please review the prerequisites for listing an interaction center node.

3. Click a node name.

The Node Details page appears. The Node Details page lists the server processes assigned to the node.

4. Select the Remove checkbox to the left of the server 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 2.3.1, "Listing Interaction Center Server Groups"](#)

- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.10, "Removing an Interaction Center Node"](#)

2.3.10 Removing an Interaction Center 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.

Prerequisites

- Define an Interaction Center Server Manager Administrator.
- Stop any server processes that are running on the node.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Nodes tab.

The Node List page appears. The Node List page lists the names of all machines that have Interaction Center Server Manager running.

If a machine is not listed, please review the prerequisites for listing an interaction center node.

3. Select the Remove checkbox to the left of the node name.
4. Click **Update**.

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

See Also

- [Section 2.3.1, "Listing Interaction Center Server Groups"](#)
- [Section 2.3.2, "Modifying Interaction Center Server Group Details"](#)
- [Section 2.3.3, "Modifying Interaction Center Server Process Details"](#)
- [Section 2.3.4, "Assigning a Different Node to a Server Process"](#)
- [Section 2.3.5, "Assigning Servers to a Node"](#)
- [Section 2.3.6, "Removing a Local Site from a Multi-Site Interaction Center"](#)
- [Section 2.3.7, "Removing a Server Process from an Interaction Center Server Group"](#)
- [Section 2.3.8, "Removing an Interaction Center Server Group"](#)
- [Section 2.3.9, "Removing a Server Process from an Interaction Center Node"](#)

Administering Oracle Interaction Centers

Topics include:

- [Section 3.1, "Starting or Stopping All Server Processes in a Server Group"](#)
- [Section 3.2, "Starting or Stopping a Server Process in a Server Group"](#)
- [Section 3.3, "Starting or Stopping a Server Process on a Node"](#)
- [Section 3.4, "Viewing the Logs for an Interaction Center Server Process"](#)

See Also

- [Chapter 1, "Understanding Oracle Interaction Centers"](#)
- [Chapter 2, "Configuring Oracle Interaction Centers"](#)
- [Chapter 4, "Configuring Oracle Interaction Center Users"](#)

3.1 Starting or Stopping All Server Processes in a Server Group

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

You will not be able to start servers if the server is not assigned to a node or if ICSM is down on the node that the server is assigned to.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Click a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group.

If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area.

Any servers in the server group are listed in the Servers area. The status of each server is displayed in the Start/Stop column. A green flag means that the server process is running. A red flag means that the server process is not running. A circle with a white "x" means that the server process is not associated with a machine.

4. If you want to start all interaction center server processes in the server group, select **Start** and then click **Submit**.
5. If you want to stop all interaction center server processes in the server group, select **Stop** and then click **Submit**.

The status of each server is displayed in the Servers area in the Start/Stop column.

See Also

- [Section 3.2, "Starting or Stopping a Server Process in a Server Group"](#)
- [Section 3.3, "Starting or Stopping a Server Process on a Node"](#)
- [Section 3.4, "Viewing the Logs for an Interaction Center Server Process"](#)

3.2 Starting or Stopping a Server Process in a Server Group

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

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Select a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group.

If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area.

Any servers in the server group are listed in the Servers area. The status of each server is displayed in the Start/Stop column. A green flag means that the server process is running. A red flag means that the server process is not running. A circle with a white "x" means that the server process is not associated with a machine.

4. If you want to start a server process, click the red flag in the Start/Stop column for the server.
5. If you want to stop a server process, click the green flag in the Start/Stop column for the server.

See Also

- [Section 3.1, "Starting or Stopping All Server Processes in a Server Group"](#)
- [Section 3.3, "Starting or Stopping a Server Process on a Node"](#)
- [Section 3.4, "Viewing the Logs for an Interaction Center Server Process"](#)

3.3 Starting or Stopping a Server Process on a Node

Use this procedure to start or stop a specific interaction center server process on a machine.

You will not be able to start servers if the server is not assigned to a node or if ICSM is down on the node that the server is assigned to.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Nodes tab.

The Node List page appears. The Node List page lists the names of all machines that have Interaction Center Server Manager running.

If a machine is not listed, please review the prerequisites for listing an interaction center node.

3. Select a node name.

The Node Details page appears. The Node Details page lists the server processes assigned to the node.

The status of each server is displayed in the Start/Stop column. A green flag means that the server process is running. A red flag means that the server process is not running. A circle with a white "x" means that the server process is not associated with a machine.

4. If you want to start a server process, click the red flag in the Start/Stop column for the server.
5. If you want to stop a server process, click the green flag in the Start/Stop column for the server.

See Also

- [Section 3.1, "Starting or Stopping All Server Processes in a Server Group"](#)

- [Section 3.2, "Starting or Stopping a Server Process in a Server Group"](#)
- [Section 3.4, "Viewing the Logs for an Interaction Center Server Process"](#)

3.4 Viewing the Logs for an Interaction Center Server Process

Use this procedure to view the log files for an interaction center server process.

Prerequisites

- Define an Interaction Center Server Manager Administrator.

Steps

1. If necessary, sign on to Oracle Applications as an Interaction Center Server Manager Administrator using the HTML Login URL.

If you are signing on to Oracle Applications with this username for the first time, you will have to choose your default responsibility, sign out, and then sign on again.

2. Select the Server Groups tab.

The Server Group List page appears. The Server Group List page lists all server groups. The list includes global server groups for multi-site interaction centers, local server groups for multi-site interaction centers, and local server groups for single-site interaction centers.

3. Select a server group name.

The Server Group Details page appears. The Server Group Details page displays the details of the server group. If the server group is a global server group for a multi-site interaction center, then the local server groups associated with this server group are listed in the Children Server Groups area. Any servers in the server group are listed in the Servers area.

4. In the Servers area, in the Server Log column, click **View Log**.

See Also

- [Section 3.1, "Starting or Stopping All Server Processes in a Server Group"](#)
- [Section 3.2, "Starting or Stopping a Server Process in a Server Group"](#)
- [Section 3.3, "Starting or Stopping a Server Process on a Node"](#)

Configuring Oracle Interaction Center Users

Every application user must be an authorized user of Oracle Applications. An application user is uniquely identified by a username and password. Once defined, an application user can sign on to Oracle Applications and access data through Oracle Applications user interfaces.

An application user is granted one or more responsibilities. A responsibility is a level of authority in Oracle Applications that allows a user to access specific Oracle Applications functions. If a user has more than one responsibility, then the user can choose a responsibility after signing on to Oracle Applications.

Oracle Applications is installed with predefined responsibilities. The responsibility key uniquely identifies a responsibility in Oracle Applications and cannot be modified after the responsibility record has been saved. However, a system administrator can change the responsibility name at any time. In addition, a system administrator can create and assign custom responsibilities.

For detailed information about Oracle Applications user accounts, see *Oracle Applications System Administrator's Guide*.

Topics include:

- [Section 4.1, "Understanding Interaction Center Responsibilities"](#)
- [Section 4.2, "Defining an Interaction Center Administrator"](#)
- [Section 4.3, "Defining an Interaction Center Agent"](#)

See Also

- [Chapter 1, "Understanding Oracle Interaction Centers"](#)
- [Chapter 2, "Configuring Oracle Interaction Centers"](#)
- [Chapter 3, "Administering Oracle Interaction Centers"](#)

4.1 Understanding Interaction Center Responsibilities

Responsibilities are associated with certain functions. There are several functions within the Oracle interaction center:

- Oracle Interaction Center Administrator
- Oracle Advanced Inbound Administration
- Oracle Advanced Outbound Administration
- Oracle Universal Work Queue Administration
- Oracle eMail Center Administration
- Oracle Scripting Administration
- Oracle Scripting User
- Oracle Interaction Center Intelligence Administrator
- Oracle Interaction Center Intelligence User
- Interaction Center Agent Administration
- Interaction Center Agent

See Also

- [Section 4.2, "Defining an Interaction Center Administrator"](#)
- [Section 4.3, "Defining an Interaction Center Agent"](#)

4.2 Defining an Interaction Center Administrator

Use the following procedure to define an interaction center administrator.

Login

Self Service Login URL

Responsibility

System Administrator

Prerequisites

None

Steps

1. Create an Oracle Applications user account (see [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)).

See Also

- [Section 4.1, "Understanding Interaction Center Responsibilities"](#)
- [Section 4.3, "Defining an Interaction Center Agent"](#)

4.3 Defining an Interaction Center Agent

Use the following procedure to define an interaction center agent.

Login

Self Service Login URL

Responsibility

System Administrator

CRM Resource Manager

HRMS Manager, for example US HRMS Manager (if Oracle Human Resource Management System is installed)

Prerequisites

None

Steps

1. Create an employee.

If Oracle Human Resource Management Systems is installed, create an employee in Oracle Human Resource Management Systems (see [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#)).

If Oracle Human Resource Management Systems is not installed, create an employee in CRM Resource Manager (see [Section 4.3.2, "Creating an Employee in CRM Resource Manager"](#)).

2. Create an Oracle Applications user account for the employee (see [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)).

3. Create a CRM resource for the employee (see [Section 4.3.5, "Creating a CRM Resource for an Employee"](#)).
4. Configure interaction center roles and parameters for the CRM resource (see [Section 4.3.6, "Configuring Interaction Center Roles for a CRM Resource"](#) and [Section 4.3.7, "Configuring Interaction Center Parameters for a CRM Resource"](#)).

Note: This is not needed if using Oracle Universal Work Queue for application work only.

5. If necessary, configure the user profile options (see [Section 4.3.4, "Configuring Profile Options"](#)).

See Also

- [Section 4.1, "Understanding Interaction Center Responsibilities"](#)
- [Section 4.2, "Defining an Interaction Center Administrator"](#)

4.3.1 Creating an Employee in Oracle Human Resource Management Systems

Note: If you do *not* have Oracle Human Resource Management Systems installed, then use CRM Resource Manager to create an employee (see [Section 4.3.2, "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**.

See Also

- [Section 4.3.2, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)
- [Section 4.3.4, "Configuring Profile Options"](#)
- [Section 4.3.5, "Creating a CRM Resource for an Employee"](#)
- [Section 4.3.6, "Configuring Interaction Center Roles for a CRM Resource"](#)

- [Section 4.3.7, "Configuring Interaction Center Parameters for a CRM Resource"](#)

4.3.2 Creating an Employee in CRM Resource Manager

Note: If Oracle Human Resource Management Systems is installed, then use Oracle Human Resource Management Systems to create an employee (see [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#))..

Use this procedure to create an employee when Oracle Human Resource Manager 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**.

See Also

- [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#)
- [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)
- [Section 4.3.4, "Configuring Profile Options"](#)
- [Section 4.3.5, "Creating a CRM Resource for an Employee"](#)
- [Section 4.3.6, "Configuring Interaction Center Roles for a CRM Resource"](#)
- [Section 4.3.7, "Configuring Interaction Center Parameters for a CRM Resource"](#)

4.3.3 Creating an Oracle Applications User Account for an Employee

Use this procedure to create an Oracle Applications user account 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 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 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').
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 one or more 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**.

See Also

- [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#)
- [Section 4.3.2, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.3.4, "Configuring Profile Options"](#)
- [Section 4.3.5, "Creating a CRM Resource for an Employee"](#)
- [Section 4.3.6, "Configuring Interaction Center Roles for a CRM Resource"](#)
- [Section 4.3.7, "Configuring Interaction Center Parameters for a CRM Resource"](#)

4.3.4 Configuring Profile Options

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.

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

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

See Also

- [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#)
- [Section 4.3.2, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)
- [Section 4.3.5, "Creating a CRM Resource for an Employee"](#)
- [Section 4.3.6, "Configuring Interaction Center Roles for a CRM Resource"](#)
- [Section 4.3.7, "Configuring Interaction Center Parameters for a CRM Resource"](#)

4.3.5 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 check boxes for the matching employees are automatically selected.

5. Clear the Select check boxes of the resources that you do not want to save.
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.

8. Select the check boxes of the employees for which want to create a CRM 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, click **Details**.

11. Verify the name of the resource (Name), the name of the employee (Source Name), and the user name (User Name).

See Also

- [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#)
- [Section 4.3.2, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)
- [Section 4.3.4, "Configuring Profile Options"](#)
- [Section 4.3.6, "Configuring Interaction Center Roles for a CRM Resource"](#)
- [Section 4.3.7, "Configuring Interaction Center Parameters for a CRM Resource"](#)

4.3.6 Configuring Interaction Center Roles for a CRM Resource

Use this procedure to configure the interaction center roles for a CRM (Customer Relationship Management) resource.

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.

Steps

1. In the Navigator window, on the Functions tab, choose **Resource Manager > Maintain Resources > Resources**.
The Find window appears.
2. Enter any additional selection criteria.
For example, in the Name field, select the name of an employee.
3. Click **Search**.
The Resource window is displayed.
4. In the Roles tab, assign an interaction center role.
For application work, you can have a Support (Customer Care) or TeleSales role.
For media work, you must have a Call Center role and have your interaction center parameters defined.
 - a. In the Role Type field, select a role type (**Callcenter, Support, or TeleSales**).
 - b. In the Role field, select a role.
The list of available roles is determined by the selected role type.
5. From the **File** menu, choose **Save**.

See Also

- [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#)
- [Section 4.3.2, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)
- [Section 4.3.4, "Configuring Profile Options"](#)
- [Section 4.3.5, "Creating a CRM Resource for an Employee"](#)
- [Section 4.3.7, "Configuring Interaction Center Parameters for a CRM Resource"](#)

4.3.7 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
- Email parameters (optional)

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.

Steps

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

The Find window appears.

2. Enter any additional selection criteria.

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

3. Click **Search**.

The Resource window is displayed.

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

- a. In the Interaction Center field, select the interaction center server group for the agent.
- b. For telephony, in the Telephony Parameters area, enter the telephony parameters for the agent.

Each row in the Telephony Parameters area corresponds to an agent telephony parameter.

- * From the Middleware list, select the middleware configuration name.
- * From the Name list, select a parameter.
- * In the Value field, enter a value for the parameter.

The telephony parameters that are required and the description of the parameter will depend on the type of switch and CTI middleware in use in the interaction center.

If you are using a Avaya Definity switch with Dialogic CT-Connect as the CTI enabler, then use the following table to set the telephony parameters for the agent.

Field Name	Description	Sample Value
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

If you are using a Avaya Definity switch with Cisco ICM as the CTI enabler, then use the following table to set the telephony parameters for the agent.

Field Name	Description	Sample Value
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 PBX admin.	46

If you are using a Nortel Meridian or Symposium Call Center Server switch with Dialogic CT-Connect as the CTI enabler, then use the following table to set the telephony parameters for the agent.

Field Name	Description	Sample Value
ACD Data 1	(Require only when the switch is in login ID mode) Agent's ACD login ID, as defined in the PBX admin	1001

If you are using a Nortel Meridian switch with Cisco ICM as the CTI enabler, then use the following table to set the telephony parameters for the agent.

Field Name	Description	Sample Value
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

If you are using an Aspect switch with Cisco ICM as the CTI enabler, 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

If you are using a Siemens HICOM switch with Dialogic CT-Connect as the CTI enabler, then use the following table to set the telephony parameters for the agent.

Parameter	Description	Example
ACD Data 2	Agent's ACD login ID, as defined in the PBX admin.	40027

If you are using an Alcatel 4400 switch with Dialogic CT-Connect as the CTI enabler, 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.	0000
ACD Data 2	Agent phone number, as defined in the PBX admin.	3551
ACD Queue	Agent's processing group number, as defined in the PBX admin.	3700

If you are using an Rockwell Spectrum switch with Dialogic CT-Connect as the CTI enabler, then use the following table to set the telephony parameters for the agent.

Field Name	Description	Sample Value
ACD Data 2	Directory Number associated with the Staff ID as configured on the Rockwell switch	5101

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

See Also

- [Section 4.3.1, "Creating an Employee in Oracle Human Resource Management Systems"](#)
- [Section 4.3.2, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.3.3, "Creating an Oracle Applications User Account for an Employee"](#)
- [Section 4.3.4, "Configuring Profile Options"](#)
- [Section 4.3.5, "Creating a CRM Resource for an Employee"](#)
- [Section 4.3.6, "Configuring Interaction Center Roles for a CRM Resource"](#)

