

Oracle® Customers Online

Implementation Guide

Release 11i

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Part No. A96193-01

This document provides the steps needed to implement the Oracle Customers Online Release 11i Patchset A / 11.5.7 (also known as IMC patch number 2201671). In all subsequent references, the prefix IMC refers to patches and profile options maintained by Oracle Customers Online.

1 Related Documentation

Oracle Applications Flexfield Guide

Oracle CRM Foundation Components Concepts and Procedures, Release 11i, Using Resource Manager.

Managing People Using Oracle HRMS Release 11i

ReadMe document for the Oracle Customers Online Release 11i Patchset A / 11.5.7 ARU (application release unit).

2 Dependencies

Oracle Customers Online requires Oracle CRM Foundation.

Please refer to the *ReadMe* document for installation dependencies.

3 Creating Employees

You must create the individuals who will be using the application as employees before you can set them up as users.

Login

Oracle Self Service Web Applications

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With Full Oracle HRMS Installation

1. If you have a full installation of Oracle Human Resources, then switch responsibility in the Oracle Forms Application to US HRMS Manager (or Human Resources Manager responsibility).
2. From US HRMS Manager, go to **People > Enter and Maintain**.
3. Click **New**.
4. Follow the instructions found in the *Managing People Using Oracle HRMS Release 11i* documentation, Chapter 1 - "Employee Management, Special Information Types, Entering and Maintaining a New Person" for Oracle HRMS rather than the instructions in the following section.

When defining a new person, please make sure that you enter `Employee` in the category field for that person.

With Shared Oracle HRMS Installation

1. If you don't have a full installation of Oracle Human Resources, then switch responsibility to CRM Resource Manager
2. Navigate to **CRM Resource Manager > Maintain Employees > Employees**.
3. Follow the instructions in the application windows.

4 Setting Up Employees as Users

Use this procedure to set up individual employees as users for your application.

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Oracle Self Service Web Applications

Responsibility

System Administrator

Steps

1. Navigate to **Security > User > Define**.
The Users window appears.
2. Enter a user name and password. You are asked to reenter the password a second time.

3. Use the Person List of Values (LOV) to select the employee who will be using the user name and password.
4. Assign one or more responsibilities to the user. The available responsibilities are:
 - Oracle Customers Online User
 - Oracle Customers Online Data Manager
 - Oracle Customers Online Superuser

When setting up an employee as a user the Start Date in the Effective Dates section is defaulted to the current system date. The End Date is left blank. Set an end date only if you want to limit a user's access to the application.

5. Click **Save** in the toolbar.

5 Importing Employees

Use this procedure to import employees from Oracle HRMS. In order for users to view the Calendar and Employee tabs, among other things, each employee must be imported and then created as a resource.

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Oracle Self Service Web Applications

Responsibility

CRM Resource Manager

Prerequisites

You must set up the employees in HRMS first.

Forms Navigation

CRM Resource Manager > Maintain Resources > Import Resources

Steps

The Selection Criteria window appears.

1. Select Employee from the **Resource Category** drop-down list.
2. If you are importing a single employee, then use the List of Values in the Name field. For groups of employees, search by job title, competency, or other search criteria.

3. Click **Search**.

The employees that match your search criteria appear.

4. Select the check boxes for the employees you want to import as resources into your application.

5. Click **Create Resource**.

The Default Values window appears.

6. Click **OK**.

The Selected Resources window appears.

7. Select the resources by selecting the appropriate boxes and click **Save Resource**.

8. If you want to see details for the newly created resource, then click **Details**.

Reference

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Release 11i*, Using Resource Manager.

6 Compiling Flexfields

Please note, it is very important to freeze and compile all flexfields using the Forms application after installation of Oracle Customers Online is complete. The procedures for freezing and compiling flexfields is located in the *Oracle Applications Flexfield Guide*.

7 Setting System Profile Options

The procedure for setting up and changing system profile options is the same for **all** Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

The following table lists the system profiles used by Oracle Customers Online. The Level column shows the possible levels at which a profile can be set: S = Site, A = Application, R = Responsibility, U = User. The default values are set at the site level. The prefix IMC in the profile option name indicates profiles owned by the Oracle Customers Online application. The AMS prefix indicates profiles owned by Oracle Marketing Online.

Profile Option Name	Level	Description	Default
IMC: Method for Defining "Recently Created"	S, A, U	If you want to define recent customers, organizations, contacts, and people as those created since a certain number of days ago, then set this profile option to <i>date</i> . Set this profile option to <i>number</i> if you want to define a certain number of records at a time as <i>recent</i> . This profile defines recent creation for customers, organizations, contacts, and people.	Number
IMC: "Recently Created" Value Definition	S, A, U	If the profile option IMC: Method for Defining "Recently Created" has been set to number, then this profile means the total number of recent records to display. If the date method has been selected, then this profile specifies the number of days to go back from the system date. ("Recently Created" = System Date - Number of Days). This profile further defines recent creation for customers, organizations, contacts, and people.	25
IMC: Limit on Number of Recently Created Records to Show by Date	S, A, U	When IMC: Method for Defining "Recently Created" is set to date method, this profile restricts how many records should be returned by this method. (Recently Created for the last 10 days could be hundreds of records. Here, you can specify that you want to return the last 10 days worth of new records, but up to 200 records).	25
IMC: Maximum Number of Organization Bookmarks	S, A, U	This profile option limits the total number of organizations a user can bookmark.	10
IMC: Maximum Number of Contact Bookmarks	S, A, U	This profile option limits the total number of contacts a user can bookmark	10
IMC: Maximum Number of People Bookmarks	S, A, U	This profile option limits the total number of people a user can bookmark.	10

Profile Option Name	Level	Description	Default
IMC: Maximum Number of "Recent Items" Displayed	S, A, U	This profile indicates the maximum number of Recent Items to be displayed in the Recent Items bin found in the Home and Customer tabs of Oracle Customers Online.	10
AMS HZ Dedupe Rule	S	Indicates whether deduplication rules are in effect for records placed into TCA. Possible values are Yes or no.	No

The following profile options are internally used by the Oracle Customers Online application and should not be changed or modified in any way:

- Bypass Group Validation
- FUNCTION_SECURITY_REGION Profile
- OSO: Application Utility Class
- IMC: Profile for User Access
- OSO: Disable Page Level Security

8 Implementation Verification

Verify your implementation by logging in for the first time and looking at the application.

Login

Use your HTML jtflogin.jsp page to log in.

Responsibility

Oracle Customers Online Superuser

Steps

1. Login to Oracle Customers Online.
You are prompted to change your password.
2. Enter your new password.
3. Click **Update**.
You are prompted to verify your default responsibility.
4. Verify your default responsibility.

5. Click **Update**.
6. Click **Signout**.
You are logged out of the application.
7. Login again using your new password.
8. Check to see if the Home Page appears.

9 Documentation Accessibility

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