Oracle® CRM Technology Foundation

Concepts and Procedures

Release 11*i*

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A guide to understanding and using the System Administrator Console, which is the Web-based interface to the CRM Technology Foundation.

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Oracle CRM Technology Foundation Concepts and Procedures, Release 11*i*

Part No. A95278-01

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Preface

Welcome to the Oracle Customer Relationship Management, Release 11i, suite of applications. This documentation is intended to accompany the 11.5.6 code release.

This Oracle CRM Technology Foundation Concepts and Procedures guide provides information and instructions to help you work effectively with the System Administrator Console, which is the Web-based interface to the CRM Technology Foundation.

This preface explains how the guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- System Administrators
- Customer Service Representatives
- Implementation Engineers

Structure

This guide is a compilation of the topics in the online help for the Oracle CRM Technology Foundation. It contains the following topic sections:

"Understanding" topics provide overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

"Using" topics provide process-oriented, task-based procedures for using the application to perform essential business tasks.

Related Documents

For more information on the Oracle CRM Technology Foundation, see the *Oracle CRM Technology Foundation Implementation Guide*.

Other Sources of Information

For additional information regarding the Oracle E-Business Suite, consult the following:

- *Oracle Applications Product Update Notes*
- *Installing Oracle Applications*
- *Oracle Applications Supplemental CRM Installation Steps*
- *Oracle Application Concepts*
- *Oracle Applications System Administrator's Guide*

1

Understanding the System Administrator Console

This topic group provides overviews of the System Administrator Console and its components as well as explanations of key concepts, features, and functions.

1.1 System Administrator Console Overview

The System Administrator Console is a Web-based interface that allows you to use the components of the CRM Technology Foundation. In it, you run diagnostics, design page flows, customize UI components, manage security, and perform other administrative tasks.

The System Administrator Console has an organizational structure consisting of tabs, subtabs, and links in the left navigation bar. Additionally, you can click the global navigation buttons at the top right of each screen to access online help, sign out, or set profile options.

See the following help topics for overviews of the features of the System Administrator Console:

Understanding User Management

Understanding Security

Understanding Site Preferences

Understanding the System Subtab

Understanding Configuration

Understanding Diagnostics

Understanding Cache

Understanding XML Services

Understanding Declarative Page Flows

Understanding Declarative Components

1.2 Understanding User Management

This section covers the following topics:

- User Management Overview
  - What is an Approval Definition?
  - Who Can Be an Approver?
  - What are Responsibilities?
  - What are Roles?
- What's New in This Release
- Terms and Definitions
- User Management Process Flow

1.3 User Management Overview

User Management is the process of registering a user and thereafter maintaining the user in the system by granting or revoking privileges, accounts, customer profile information, and party relationships based on a set of business requirements set-forth by the organization where the process is deployed.

With User Management, you can register new users, modify existing users, approve or reject user approval requests, and assign users to business accounts. You can also customize the user registration process by configuring templates, enrollments, user types, and approval processes.

1.3.1 What is an Approval Definition?

The User Management Approval definition uses workflow to track and route the request to the approvers. An approval definition can deliver an e-mail notice to the approvers. Both user types and enrollments can share the same approval definition. The e-mail notifies what types of requests are being requested (user type or enrollment) and what action the approver needs to take.

If the approval definition has more than one approver, the e-mail notification is sent to the next approver when the previous approver has approved. For the user to be granted access, all approvers in the chain need to approve the request. The request is granted after the last approver from the list accepts it. Whereas to reject, only one rejection is needed from an approver. A request times out if it is left in an approvers queue for a specified amount of time.

If the order of the approvers change, all pending requests are transferred back to the top of the new approver list. If the user type or enrollment is changed to use another approval definition, all pending request's workflow processes end and you create and launch a new workflow process. If a user type or enrollment is modified so it no longer needs approval, then all pending requests are automatically approved.

1.3.2 Who Can Be an Approver?

Approvers are application user, who one of the following permission:

- JTF_REG_APPROVAL or JTF_SECURITY_ASSIGN_ROLE (System Administrator) permission
- JTF_APPROVER (Request Owner) permission
- JTF_PRIMARY_USER_SUMMARY permission (Primary user).

The Primary user must also have the JTF_PRIMARY_USER responsibility to access the approval page. The system administrator can define a global or default list of approvers for each user type and enrollment. Any approver can be overridden at the organization level by the system administrator.

For business users, account assignment is provided with the approval process. New accounts can be created for an organization and assigned to the user during the approval process. Individual users may not require approval to register. If no approval is necessary for this type of user, new accounts are created and assigned automatically. If a customer determines that individual users require an approval, then they should the auto account creation for this user. Primary users require approval. However, a merchant administrator can disable this prerequisite. Merchant Administrators have the option of requiring registration approval for all user types.

When a Primary User register’s a company for the first time, the approver must create a new account and associates that account with the user. If approval is not required, then a new account is automatically created for the user’s organization and associated with the first user to register for that company. If they are not the first person to register for the organization, then it is up to the primary user to assign the newly created account to that new user.

1.3.3 What are Responsibilities?

Responsibilities refer to application user responsibilities which are a representation of the menu hierarchy available to a particular user type. During the registration process, users are granted access to one or more responsibilities depending on the services they enroll in and the merchant policy. Typically, individual users are given access only to one responsibility.

1.3.4 What are Roles?

Roles are groupings of permissions, which are page level or function level granular privileges used to maintain application security. A single user can be granted several roles and each separately determines access rights to UI details, ability to perform certain transactions and ability to access certain data sets. During the registration process users are granted the appropriate set of roles that maps to their job function.

1.4 What's New in This Release

This release of the 11.5.6 Oracle E-Business Suite has the following new features and functions for User Management:

- HTML user interface
- Primary user type
- Customizing enrollment
- Self-service enrollment
- Account administration for Business to Business (B2B) and Business to Customer (B2C) users
- User disablement
- User profile windows
- User maintenance windows

1.5 Terms and Definitions

The following table describes terms and definitions associated with User Management.

Table 1–1 User Management Terms and Definitions

Term	Description
Approval	An optional feature where approvers can reject or approve new user accounts. In the User tab, the System Administrator Console provides windows so you can view, create, modify, delete, enable, and disable approvals, including those for specific organizations.
Approval Flow	The approval flow is a predefined flow of steps required to approve user registration or service enrollment requests.
Business User	A business user is a typical B2B user, associated with an organization. Generally, the Primary user(s) of the same organization approves these users.
Customer	Customers are typically primary users, B2B users, and B2C (individual) users.
Enrollment	Enrollment is a set of add-on services that you can receive during or after registration. One enrollment corresponds to zero or one responsibility, zero or one template, zero or one approval and zero or more roles. Enrollments are application specific and can be tied to user types.
Explicit Enrollment	These are enrollments that you manually register for during the registration process from the "Register Here" link.
Implicit Enrollment	These are enrollments that a user is automatically signed up for during the registration process from the "Register Here" link. The user is not asked to register for these enrollments. Instead, they are automatically attached to the user upon registration.
Individual User	An individual user is an individual with no relationship to an organization. Generally, no approval is required for this type of user.
JSP	Java server pages are an extension to the Java servlet technology that was developed by Sun as an alternative to Microsoft's ASPs (Active Server Pages). JSPs have dynamic scripting capability that works in tandem with HTML code, separating the page logic from the static elements -- the actual design and display of the page.

Table 1–1 User Management Terms and Definitions

Term	**Description**
JTF_APPROVER Permission	If you have this responsibility, you can only view requests assigned to you.
JTF_PRIMARY_USER Responsibility	A Primary User must have the JTF_PRIMARY_USER responsibility to access this page and approve requests.
JTF_PRIMARY_USER_ SUMMARY Permission	If you have this permission, which is part of the JTF_ PRIMARY_USER role you can only view requests assigned to you and the Universal Primary User Approver for your organization.
JTF_REG_APPROVAL Permission	The user, who has "JTF_REG_APPROVAL" permission, is considered to be a system administrator. With this permission, you can view and respond all requests in the system.
JTF_SECURITY_ASSIGN_ ROLE Permission	The user, who has the JTF_SECURITY_ASSIGN_ROLE permission is considered to be a system administrator. With this permission, you can view and respond to all requests in the system.
Merchants	Merchants refer to the implementor of the Oracle e-Business Suite. This term is used to clear up any confusion with the term "customers", which refers to customers of a business using Oracle products as opposed to those implementing the product.
Merchant Administrator (System Administrator)	The merchant or system administrator is the main administrator of a company who approves requests for primary, business, and individual users. This administrator, who has the JTF_REG_APPROVAL permission, sees all the pending requests to be approved and is able to approve them.
Primary User	A designated person of an external organization, like a business partner, who is responsible for some administrative functions on behalf of the external organization. In the case of registration the Primary user is responsible for managing the registration and maintenance of users, accounts, and enrollments. Primary users of different parties may have access to different responsibilities and they may be granted different access rights.
Registration	Registration is the process by which any user gains some access to the application's functionality.

Table 1–1 User Management Terms and Definitions

Term	Description
Registration Self-service Administration UI	The Registration Self-service Admin UI is used by system administrators, and at times Primary users, to maintain external organization or internal group, users, parties, and accounts.
Registration Self-service user UI	The Registration Self-service user UI is used by the Primary, Individual, or Business users to register themselves.
Registration Templates	Applications require varying pieces of information to register different types of users. Registration Templates refer to JSP files that are used to capture the registration information that is special to a particular User Type or Enrollment.
Request Owner	The request owner is the current approver based on the approver list and current state of workflow defined for given approval. The request owner is only able to approve the requests which they currently own. This user should have "JTF_APPROVER" permission. The request owner is tied to the JTF_UM_APPROVAL_OWNER profile option.
Responsibilities	Responsibilities are groupings of application menus that determine the user interface accessible to a particular user.
Roles	Roles are groupings of permissions, which are page level and function level granular privileges used to maintain application security.
Self-service Registration	Rather than asking an administrator to register users manually, users can register themselves through a self-service UI. Self-service registration includes that UI and the background processes used to complete the registration process. This involves assigning users the correct data and UI access privileges.
Template Handler	Template handlers refers to how the data flow built by other application teams occur among registration and how they are associated with enrollments and user types in the User Management framework.
Universal Primary User Approver	Create a Universal Primary User Approver if you want to have multiple primary users.
User	A user is any person who needs access to any application, including various types of customers, partners, suppliers, and employees.

Table 1–1 User Management Terms and Definitions

Term	Description
User Profile	User Profiles, which are associated with responsibilities, are set of user interfaces that give users access to their personal data and preferences.
User Profile Menus	User Profile menus are groupings of user profile pages (options), which are relevant to a particular responsibility. User Profiles are user interfaces to user's personal data and preferences. A number of responsibilities can share the same User Profile menu.
User Type	A User Type is a category of users that caters to the specific needs of an application's business requirements. User types allow flexible and extensible ways for defining, categorizing and implementing behavior of users. A user type is associated to only one template, one responsibility, zero or one approval and zero or more roles.
Workflow	Oracle Workflow automates and continuously improves business processes, routing information of any type according to business rules you can change. Oracle Workflow manages business processes according to rules that you define. The rules, which we call a workflow process definition, include the activities that occur in the process and the relationship between those activities. An activity in a process definition can be an automated function defined by: ■ a PL/SQL stored procedure or an external function ■ a notification to a user or role that they may request a response ■ a business event ■ a subflow that itself is made up of many activities.

1.6 User Management Registration Process Flow

There are three different types of users currently available in User Management:

- Business User
- Individual User
- Primary User

When a user registers, depending on the user type, an approval task is generated and assigned to an approver. The approver is notified through Workflow that there are pending requests in the queue. The request is reviewed and possibly modified, and either rejected or approved. Upon approval, the request is forwarded to the next approver. Once all approvals are granted, the user is notified through e-mail and given access to the system.

Business User

A business user is a typical B2B user, associated with an organization. Generally, the Primary user of an organization approves these users. The following table describes the process flow of a Business User in User Management.

Table 1–2 Business User Approval Process Flow

Steps	Description	Required	Performed By
Click the Register Here link	This link accesses the User Registration window.	Yes	All Users
Select the Business User option button	Select this option if you are a current customer and B2B user.	Yes	All Users
Enter your company's organization number	This number is assigned to your company when it is registered as a customer. The Primary User of a company has access to this information.	Yes	All Users
Enter your personal information	Enter your personal information in the associating text field.	Yes	All Users
Select enrollments for your registration	Register for any available enrollments that interest you.	Optional	All Users
Fill out any templates associated with the enrollment that you selected	Some enrollments may have separate windows to capture key information about the enrollment that you selected.	Yes	All Users
Review and maintain your confirmation information	This window gives you detailed information about your registration including: ▪ A confirmation number ▪ The date the registration began ▪ Your name ▪ The user type ▪ Your organization number ▪ Your username ▪ Any enrollment information	Optional	All Users

Table 1–2 Business User Approval Process Flow

Steps	Description	Required	Performed By
An email/workflow notification is sent	The workflow sends out a notification to the approver. If the workflow mailer is set up, the approver also receives an email.	Yes	Workflow
Approver signs in and goes to the pending approval window	The approver must have the following responsibilities and permissions to approve requests: ▪ JTF_APPROVER (permission) ▪ JTF_PRIMARY_USER (permission) ▪ JTF_PRIMARY_USER (responsibility)	Yes	System Administrator or Primary User
Approver clicks on the Username link	This link accesses the User Details window where the approver can review the user's personal information. This step is required if the user request must be approved.	Optional	System Administrator or Primary User
Assign an account or creates a new account and assign it to the user	All users must have an account associated with them in order to access their company's or individual information and create financial transactions.This step is required if the user request must be approved.	Optional	System Administrator or Primary User
Enter a comment for the user	Enter a comment about the users approval or enter a reason why you accepted or rejected their request.	Optional	System Administrator or Primary User
Click accept to approve the request or reject to refuse it	Whether or not the request is accepted or rejected, the user receives a notification.	Yes	System Administrator or Primary User
Notification is sent to the requestor	The requestor receives a notification, as well as an email (workflow mailer is set up), confirming or rejecting their approval.	Yes	Workflow
Login with your new username and password	Depending on your user type and pending approval, you are logged in. What you see is associated with the roles and responsibilities the approver assigned to you, which depends on the user type and enrollment selections.	Optional	All Users

Individual User

An individual user is an individual person having no relationship to an organization. Generally, no approval is required for this type of user. The following table describes the process flow of a Individual User in User Management.

Table 1–3 Individual User Approval Process Flow

Steps	Description	Required	Performed By
Click the Register Here link	This link accesses the User Registration window.	Yes	All Users
Select the Individual User option button	Select this option if you a new or existing store user.	Yes	All Users
Enter your personal information	Enter your personal information in the associating text field.	Yes	All Users
Select enrollments for your registration	Register for any available enrollments that interest you.	Optional	All Users
Fill out any templates associated with the enrollment that you selected	Some enrollments may have separate windows to capture key information about the enrollment that you selected.	Yes	All Users
Review and maintain your confirmation information	This window gives you detailed information about your registration including: ▪ A confirmation number ▪ The date the registration began ▪ Your name ▪ The user type ▪ Your username ▪ Any enrollment information	Optional	All Users
Approver clicks on the Username link	This link accesses the User Details window where the approver can review the user's personal information.	Yes	System Administrator or Primary User
Assign an account or creates a new account and assign it to the user	All users must have an account associated with them in order to access their company's or individual information and create financial transactions.	Yes	System Administrator or Primary User
Enter a comment for the user	Enter a comment about the users approval or enter a reason why you accepted or rejected their request.	Optional	System Administrator or Primary User

Table 1–3 Individual User Approval Process Flow

Steps	Description	Required	Performed By
Click accept to approve the request or reject to refuse it	Whether or not the request is accepted or rejected, the user receives a workflow notification.	Yes	System Administrator or Primary User
Notification is sent to the requestor	The requestor receives a workflow notification, as well as an email (if the email workflow is set up), confirming or rejecting their approval.	Yes	System Administrator or Primary User
Login with your new username and password	Depending on your user type and pending approval, you are logged in. What you see is associated with the roles and responsibilities the approver assigned to you.	Optional	All Users

Primary User

A Primary user is also known as the customer administrator and is responsible for managing all users of the same organization. Generally, the system or merchant administrator approves these users. Your organization can have multiple Primary Users. The following table describes the process flow of a Primary user in User Management.

Table 1–4 Primary User Approval Process Flow

Steps	Description	Required	Performed By
Click the Register Here link	This link accesses the User Registration window.	Yes	All Users
Select the Primary User option button	Select this option if you are Registering your company here. Primary Users are Point of Contacts for Customers. As a Primary User, your permissions and responsibility are almost identical to Business Users except that your are responsible for validating and approving Business Users for your company.	Yes	All Users
If you are an existing customer, select the first option button and enter your company's organization number If you are a new customer registering as the first primary user for your organization, select the second option button and enter your company's information	This number is assigned to your company when it is registered as a customer.	Yes	All Users
Enter your personal information	Enter your personal information in the associating text field.	Yes	All Users
Select enrollments for your registration	Register for any available enrollments that interest you.	Optional	All Users
Fill out any templates associated with the enrollment that you selected	Some enrollments may have separate windows to capture key information about the enrollment that you selected.	Yes	All Users

Table 1–4 Primary User Approval Process Flow

Steps	Description	Required	Performed By
Review and maintain your confirmation information	This window gives you detailed information about your registration including: ■ A confirmation number ■ The date the registration began ■ Your name ■ The user type ■ Your organization number ■ Your username ■ Any enrollment information	Optional	All Users
Approver signs in and goes to the pending approval window	The approver must have the following responsibilities and permissions to approve requests: ■ JTF_APPROVER (permission) ■ JTF_PRIMARY_USER (permission) ■ JTF_PRIMARY_USER (responsibility)	Yes	System Administrator or Primary User
Approver clicks on the Username link	This link accesses the User Details window where the approver can review the user's personal information.	Yes	System Administrator or Primary User
Assign an account or creates a new account and assigns it to the user	All users must have an account associated with them in order to access their company's or individual information and create financial transactions.	Yes	System Administrator or Primary User
Enter a comment for the user	Enter a comment about the users approval or enter a reason why you accepted or rejected their request.	Optional	System Administrator or Primary User
Click accept to approve the request or reject to refuse it	Whether or not the request is accepted or rejected, the user receives a workflow notification.	Yes	System Administrator or Primary User
Notification is sent to the requestor	The requestor receives a workflow notification, as well as an email (if the workflow mailer is set up), confirming or rejecting their approval.	Yes	Workflow
Login with your new username and password	Depending on your user type and pending approval, you are logged in. What you see is associated with the roles and responsibilities the approver assigned to you.	Optional	All Users

1.7 Understanding Security

The interface for the CRM Technology Foundation Security framework is the Security subtab of the System Administrator Console. The Security subtab displays under the Settings tab. The Security screens allow you to control access to application resources.

Read this section to understand the basic concepts involved in setting up and using the Security framework. For detailed instructions, see Managing Security.

1.7.1 Key Security Concepts and Features

The following table describes the key concepts and features of the Security framework.

Term	Definition
Permission	A unit of privilege that is granted to a user. It usually serves to grant a certain type of access to a resource. Resources are application elements such as objects or methods of objects. A resource can have unique permissions for each way that it can be accessed. In the Security subtab, you can view, create, and delete permissions as well as map them to roles.
Role	A group of permissions. In the Security subtab, you can view, create, and delete roles, as well as set which permissions are mapped to each role.
Alerts Monitor	A display of important security-related tests, run on each registered host. The Security Alerts Monitor is a customized view of the System Alerts page that appears under the Deployment tab.

1.8 Understanding Site Preferences

The Site Preferences subtab displays under the Settings tab. The Site Preferences screens allow you to personalize the Interapplication Bar.

Read this section to understand the basic concepts involved in setting up and using Site Preferences. For detailed instructions, see Using Site Preferences.

1.8.1 Key Site Preferences Concepts and Features

The following table describes the key concepts and features of Site Preferences.

Term	Definition
Interapplication Bar	A group of customizable links that displays at the top of every page in HTML-based CRM applications.
Navigation Group	A customizable set of applications with defined responsibilities. In the Site Preferences subtab, you can map CRM applications into Navigation Groups. Additionally, from the Navigation Group Setup screen, you can create, delete, activate, and deactivate Navigation Groups.

1.9 Understanding the System Subtab

The System subtab displays under the Settings tab. The System screens allow you to configure the system level properties that you need to set up during the deployment process: the self service user (AKA guest user), branding, cookies, sessions, loggings, property categories, and properties.

Read this section to understand the basic concepts involved in setting up and using system level properties. For detailed instructions, see Using the System Subtab.

1.9.1 Key System Subtab Concepts and Features

The following table describes the key concepts and features of the System Subtab.

Term	Definition
Sessions	A system property that carries user identity and credentials throughout the duration of a user's activity. In the System subtab, you can set up both User Sessions and Sticky Sessions. When using Sticky Sessions, all requests from the same user session will attempt to go to the same JVM, regardless of whether the application is in stateless mode or stateful mode. Sticky Sessions allow for several performance enhancements. In particular, the hit ratio of middle tier caching is improved because all cached data for a particular user resides on a single JVM rather than being scattered across different JVM instances. In addition, session attributes and resources will not have to be recreated and duplicated across different JVMs, but can be reused in the JVM associated with the session.

Term	Definition
Cookies	A system property that stores information about users and systems as users log in to applications. In the System subtab, you can define cookie names, types, encryption, and expiration times.
Branding	The wording that displays at the top left of every page, depending upon responsibility. The branding can be defined at both application level and responsibility level. A responsibility can only belong to one application and an application can have multiple responsibilities. If the branding for a particular responsibility is not set, the branding for all responsibilities within the application (application level) will be used. If the branding for a particular responsibility is set, the branding will take precedence and override the branding set at application level. In the System subtab, you can personalize and preview Branding.
Self Service User	Also known as Guest User. An internal user who is granted certain responsibilities and permissions so that the self registration process offers new users the appropriate responsibilities and permissions. In the System subtab, you can set up the name and password of the Self Service User.
Logging Trails	A system property that helps you debug system-related codes. In the System subtab, you can configure both Framework Logging Options and Service Logging Options. Framework Logging is used by the CRM Technology Foundation, while Service Logging is used by all applications.
Property Categories Setup	In the System subtab, you can set up the applications that you want to register in the system properties framework. A property is a key/value pair that is application-specific.
Password Expiration	In the System subtab, you can specify the time interval for which a password is valid.
Advanced	In the System subtab, you can view, create, modify, delete, and copy properties (application-specific key/value pairs). A key is what is used by an application to retrieve data. Keys are unique, but can have multiple values. Values are the content or data that binds to a particular key.

1.10 Understanding Configuration

The Configuration subtab displays under the Deployment tab. The Configuration screens allow you to manage a system's hosts and resource settings.

Read this section to understand the basic concepts involved in using the Configuration screens. For detailed instructions, see Managing Configuration.

1.10.1 Key Configuration Concepts and Features

The following table describes the key concepts and features of the Configuration subtab.

Term	Definition
Host	Synonym for computer, machine, box, or node. For example, a generic host name is *computer_name.company_name.com*. In the Configuration subtab, you can view, register, modify, and remove the hosts in your system.
Resource Settings	Settings that allocate system resources in order to optimize application performance.
Cache	A data structure that holds frequently used Java objects. It is composed of component caches. Component caches hold the objects of application modules that pertain to specific application functionality. In the Resource Settings subtab, you can set the maximum size of the cache (in megabytes). This is used to prevent the JVM memory from bloating because of caching. When the JVM's memory usage reaches this limit, the cache stops growing in size. Elsewhere, in the Cache subtab, you can manage cache policies, manage component caches, and view cache statistics. For more information, see Understanding Cache.
Concurrent	Occurring at the same time. In the Resource Settings subtab, you can set the maximum number of concurrent users.
Load Balancer	The host that manages user requests across all the mid-tier hosts.

1.11 Understanding Diagnostics

The interface for the Oracle CRM Technology Foundation Diagnostics framework is launched when you click the Diagnostics tab of the System Administrator Console. It allows you to troubleshoot any setup and installation problems of the technology foundation and certain participating applications. Additionally, it allows you to register and employ new diagnostic tests. The Diagnostics screens allow you to run test groups, run individual tests, manage test groups, manage tests, set default test input values, and register applications.

Read this section to understand the basic concepts involved in setting up and using the Diagnostics framework. For detailed instructions, see Using Diagnostics.

Note: The following URL can also be used to access the Diagnostics screens:

http://<*hostname*>:<*portnumber*>/OA_HTML/jtfqalgn.htm

1.11.1 Key Diagnostics Concepts and Features

The following table describes the key concepts and features of the Diagnostics framework.

Term	Definition
Applications	You must register the applications that you want to run tests on. In the Diagnostics screens, you can register applications and if necessary, define application prerequisites.
Test	A Java test that verifies the correct behavior of a particular feature or function. In the Diagnostics screens, you can run, register, delete, and set default input values for tests.
Test Group	A set of related tests. A test group may have other test groups defined as prerequisites. In the Diagnostics screens, you can run, create, modify, and remove test groups.

Term	Definition
Prerequisite	A concept that applies to both applications and test groups. Setting prerequisites is sometimes necessary for procedures to execute correctly. For example, the DBConnections test group has the Environment Setup test group set as its prerequisite, because the Environment Setup test group contains the DBC Parameter test which checks the DBC file. If the DBC Parameter test fails, no tests in the DBConnections test group will be successful. In addition, the CRM Technology Foundation application has the HTML Platform application set as its prerequisite. If some tests in the CRM Technology Foundation fail, it is likely due to an error in the HTML Platform. Therefore you can run the HTML Platform tests to trace the problem. The Diagnostics interface offers screens that allow you to define prerequisites for applications as well as test groups.

1.12 Understanding Cache

The interface for the CRM Technology Foundation Java Objects Cache is the Cache subtab of the System Administrator Console. The Cache subtab displays under the Performance tab. The Cache screens allow you to clear or reload the Cache, manage Cache Policies, manage Component Caches, and view Cache statistics.

Read this section to understand the basic concepts involved in setting up and using the Cache. For detailed instructions, see Using Cache.

1.12.1 Key Cache Concepts and Features

The following table describes the key concepts and features of the Cache.

Term	Definition
Cache	A data structure that holds frequently used Java objects. It is composed of Component Caches. A Component Cache holds all the Java objects belonging to an application component. An application component pertains to specific application functionality. In the Cache subtab, you can clear or reload the Cache, manage Cache Policies, manage Component Caches, and view Cache statistics. Elsewhere in the Resource Settings subtab, you can set the maximum size of the Cache.

Term	Definition
Policy	A setting that applies to an application running on a host. The policy types are Cache Only, Cache and Priming, Disabled, and Custom. In the Cache subtab, you can set Cache Policies.
Filter	An application-specific component that indicates what responsibility IDs and language codes to prime for.
Component Cache	A data structure that holds the Java objects of an application module pertaining to a specific application functionality. For example, Catalog and MenuRenderer are components that have component caches. In the Cache subtab, you can view, create, modify, and remove Component Caches.
Statistics	A display of Component Cache performance metrics.

1.13 Understanding XML Services

The interface for CRM Technology Foundation XML Services is the XML Services subtab of the System Administrator Console. The XML Services subtab displays under the Integration tab. The XML Services screens allow you to manage Service Groups, Authentication Profiles, Invocations, and Events.

Read this section to understand the basic concepts involved in setting up and using XML Services. For detailed instructions, see Using XML Services.

1.13.1 Key XML Services Concepts and Features

The following table describes the key concepts and features of XML Services.

Term	Definition
XML Services	A framework that allows you to manage interapplication Web service sharing. In other words, you can use XML Services to send and receive business logic over the Internet from one application to another. In the XML Services subtab, you can manage Service Groups, Authentications, Invocations, and Events.

Term	Definition
Services	The logical names of function calls with defined inputs and outputs. They are implemented as methods of Java classes. Services are application specific and usually represent a unit of business logic. In the XML Services subtab, you can enable and disable Services within Service Groups.
Service Group	The logical name of a Java class that contains methods exposed as services. In the XML Services subtab, you can view, create, modify, and delete Service Groups.
Authentication Profile	Tells an invocation what host, user name, and password to use. In the XML Services subtab, you can view, create, modify, and delete Authentication Profiles.
Invocation	The logical name of a connection that calls a service on a remote host. In the XML Services subtab, you can view, create, modify, and delete Invocations.
Event	Outputs an object of a predefined input type to a set of subscribers. In the XML Services subtab, you can view, create, modify, and delete Events.
Event Subscribers	Invocations that are registered to an event. In the XML Services subtab, you can set the Event Subscribers for an Event.

1.14 Understanding Declarative Page Flows

The interface for the CRM Technology Foundation Declarative Page Flows framework is the Declarative Flows subtab of the System Administrator Console. The Declarative Flows subtab displays under the Design tab. The Declarative Flows screens allow you to manage Physical Pages, Rules, Logical Pages, and Business Flows.

Read this section to understand the basic concepts involved in setting up and using Declarative Page Flows. For detailed instructions, see Using Declarative Page Flows.

1.14.1 Declarative Page Flows Overview

The Declarative Page Flows framework enables you to customize, upgrade, and troubleshoot the content and flow of JSPs within an application without making any modifications to actual code. The Declarative Page Flows framework is based on the abstraction of JSPs into named logical entities. Consequently, you can achieve efficient management of content and flows by utilizing the screens provided in the System Administrator Console.

1.14.2 Key Declarative Page Flows Concepts and Features

The following table describes the key concepts and features of Declarative Page Flows.

Term	Definition
Physical Page	The name of a JavaServer Page (JSP). In the Declarative Flows subtab, you can view, register, and modify Physical Pages.
Rule	A rule is defined by parameters and conditions and determines which Physical Page needs to be rendered or which Logical Page needs to display next. Rules evaluate to true when all of their conditions evaluate to true. In the Declarative Flows subtab, you can view, create, and modify Rules.
Logical Page	A named logical entity that has one or more Physical Pages mapped to it. Usually, each Logical Page represents a node within a Business Flow. In the Declarative Flows subtab, you can view, create, and modify Logical Pages.
Business Flow	A sequential set of linked Logical Pages that usually corresponds to a business task. Business Flows can be linear or nonlinear, depending on whether or not there are context-sensitive conditions. Branching conditions are evaluated at each node. In the Declarative Flows subtab, you can view, create, modify, clone, and preview Business Flows.

Term	Definition
Flow Cloning	In order to facilitate the easy upgrade of business flows which have been customized by a customer, a business flow can be cloned, thus creating a Flow Family of related business flows. In the Declarative Flows subtab, the Clone Flow screen allows you to generate duplicates of a given flow.
Flow Families	A flow family consists of an original business flow, a clone of the original business flow, and any customized clones which have been made. In the Declarative Flows subtab, the Flow Families screen allows you to view the contents of a Flow Family and select which flow is active.

1.15 Understanding Declarative Components

The interface for the CRM Technology Foundation Declarative Components framework is the Declarative Components subtab of the System Administrator Console. The Declarative Components subtab displays under the Design tab. The Declarative Components screens allow you to create and manage components (Bins, Graphs, Reports, Graph/Report combinations, and LOVs) as well as component security settings.

Read this section to understand the basic concepts involved in setting up and using Declarative Components. For detailed instructions, see Using Declarative Components.

1.15.1 Declarative Components Overview

The Declarative Components framework allows you to quickly build UI components that display application-specific data in personalizable Bins, Graphs, Reports, Graph/Reports, or LOVs. The coding requirements are minimal to nonexistent and the components can be published on Oracle applications.

1.15.2 Key Declarative Components Concepts and Features

The following table describes the key concepts and features of Declarative Components.

Term	Definition
Metadata	The Declarative Components framework relies on the accurate definition of metadata. The framework uses the metadata to capture information about component headers, footers, columns, and other attributes. In the Declarative Components subtab, you can define the metadata for bins, reports, graphs, graph/report combinations, LOVs, and parameters.
Bin	Bins are small reports which display high level summary information in a tabular format. They generally display information regarding a single metric, such as "time period." If enabled and the appropriate security features are assigned, you can choose which bins to display on the home page and also choose the order in which multiple bins are displayed. In the Declarative Components subtab, you can view, create, modify, and remove Bins.
Report	Reports are similar to bins. They display information in a tabular format. In the Declarative Components subtab, you can view, create, modify, and remove Reports. Optionally, you can do the same for Report/Graph combinations.
Graph	A graph is a diagram that represents data pictorially. In the Declarative Components subtab, you can view, create, modify, and remove Graphs. Optionally, you can do the same for Report/Graph combinations.
LOV	The LOVs that you create can be used across applications. LOV means "list of values." It is a UI component that facilitates the completion of a text entry field when there are numerous values that may be assigned. LOVs are a useful alternative to drop-down lists, particularly in cases where displaying a long list of selections in a drop-down list would require excessive scrolling. In short, when using a LOV to complete a text entry field, you type a query into the field and then click a button labeled "Go." This opens a screen where you view a list of values that match the query you submitted. You can then select the value that you desire and return to the original screen, where what you selected will populate the original text entry field. In the Declarative Components subtab, you can view, create, modify, and remove LOVs.

2

Using the System Administrator Console

This topic group provides process-oriented, task-based procedures for using the System Administrator Console.

The following tabs and subtabs are described in this topic group:

- Administering User Management
- Managing Security
- Using Site Preferences
- Using the System Subtab
- Managing Configuration
- Using Diagnostics
- Using Cache
- Using XML Services
- Using Declarative Page Flows
- Using Declarative Components

For information on User Management, please see CRM Foundation Concepts and Procedures.

2.1 Administering User Management

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities. This section covers the following topics:

- Logging into User Management

- Approving Pending User Requests
- Viewing Your Notifications
- Approving Requests from the Notification Window
- User Maintenance
  - Viewing All Users
  - Searching for a User
  - Creating a New User
  - Editing a User's Details
  - Deleting a User
  - Defining a User's Roles
  - Defining a User's Account
  - Defining a User's Enrollment
- Setting up Approval Types
  - Creating a New Approval Type
  - Removing an Approval Type
  - Searching for an Approval Type
  - Editing an Approval Type's Details
  - Enabling and Disabling Approval Types
  - Searching for an Organization
  - Viewing Approval Preferences
  - Updating Approval Preferences
- Setting up Enrollments
  - Creating an Enrollment
  - Removing an Enrollment
  - Enabling and Disabling Enrollments
  - Editing an Enrollment's Details
- Setting up User Types
  - Creating a User Type

   - Removing a User Type
   - Activating and Deactivating User Types
   - Searching for a User Type
   - Editing a User Type's Details
- Setting up Templates
   - Creating a Template
   - Removing a Template
   - Enabling and Disabling Templates
   - Editing a Template's Details
   - Searching for a Template

2.2 Logging into User Management

The following modules use User Management to register users:

- Oracle iStore
- Oracle iSupport
- Oracle Partners Online

Perform the following steps to log into the System Administrator Console.

Note: All fields marked with an asterisk are required.

Prerequisites

- You must have a valid username and password.
- You must have the CRM HTML Administration responsibility.

Steps

1. Navigate to the Login window.
2. Enter your username.
3. Enter your password and click **Go**.

2.3 Approving Pending User Requests

When a user requests a user account, in many cases, it must be approved by a system administrator. Perform the following steps to accept or reject user approval requests, edit user information, and assign accounts to the user.

> **Note:** Any pending user requests submitted before User Management was applied do not appear in the Pending Request window. Instead, you must click on the link in the window to respond to these requests.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions, to approve a request.

Steps

1. Log in as the system administrator.
2. Select the Users tab.
3. Click **Pending Approvals** on the side navigation bar.

   The Request Summary window opens.
4. To answer the request from this window, select the check box next to the user and click **Accept** or **Reject**.
5. Click a username in the Username column.

   The User Details window opens.
6. Review or edit the user's details.
7. Click **Next**.

   The Accounts window opens.
8. Select any accounts you want to assign to the user or enter a new account name and click **Create**.

   The new account is added to the table.
9. Select the account and click **Next**.

   The Approval Outcome for Applicant window opens.
10. Click **Accept** to approve the request or click **Reject** to deny the request.

A notification is sent to the user when the last approver from the approval definition approves it.

2.4 Viewing Your Notifications

A merchant administrator, system administrator, or a primary user for an organization can approve or reject a users request. Whether the request is granted or rejected, the user receives a notification. Perform the following steps to view your user requests.

Prerequisites

You must set up your Personal Home Page (PHP) and have the workflow and self service responsibilities to receive notifications.

Steps

1. Log in as the System Administrator.
2. Set up your Personal Homepage (PHP) to show workflow notifications.
3. Select the Main Menu tab.
4. Click **Workflow**.
5. Click **View Notifications**.

   Your notifications appear in the Worklist window.

See Also

- Approving Requests from the Notification Window

2.5 Approving Requests from the Notification Window

Note: When an approver receives a registration request in their Notifications, they have the option to reassign it. However, it is the approvers responsibility to confirm that the person you are reassigning the request to has the correct approver responsibilities and permissions. The list provided includes application users that may or may not have the appropriate responsibilities to approve user requests.

For user types, the system administrator receives a URL in their notifications. The approver follows the URL to approve or reject the request. Perform the following steps to approve or reject a user requests.

Prerequisites

You must set up your Personal Home Page (PHP) and have the workflow and self service responsibilities to receive notifications.

Steps

1. Log in as the System Administrator.
2. Set up your Personal Homepage (PHP) to show workflow notifications.
3. Select the Main Menu tab.
4. Click **Workflow**.
5. Click **View Notifications**.

   Your notifications appear in the Worklist window.
6. Click the link to respond to the request.

   The Notification Details window opens.
7. Review the users details and click **Approve** to accept the request or click **Reject** to deny the request.
8. To reassign the request:
   a. Click **Reassign**.
   b. Enter the Approvers name or click the Up arrow icon to search for an approver.

      You are responsible for verifying
   c. Select the **Delegate Authority for responding to this notification** option button to send the request to an approver w to Transfer Ownership of this notification
   d. Enter any comments you want the new approver to view.
   e. Click **OK**.

      The request is **Reassigned**.

See Also

- Viewing Your Notifications

2.6 Viewing All Users

Perform the following steps to view all users in the system.

> **Note:** If you are the Primary user for your organization, you will only be able to view users for your company.

Prerequisites

You must be the merchant administrator, system administrator, or the primary user of a company with the appropriate permissions, to view all users.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. Enter a minimum of three characters into to the search field.

   The "%" and "_" (underscore) symbols are wildcards.
5. Click **Go**.

   A list of all users displays.

See Also

- Searching for a User
- Creating a User
- Editing a User’s Details
- Deleting a User
- Defining a User’s Roles
- Defining a User’s Account
- Defining a User’s Enrollment

2.7 Searching for a User

Perform the following steps to search for a user.

Note: If you are the Primary user for your organization, you are only able to query users for your company.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to search for a user.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.
5. Enter a minimum of three characters into to the search field.

   The "%" and "_" (underscore) symbols are wildcards.
6. Click **Go**.

   A list of search results appears in the window.

Note: To search for all users in the system, enter three spaces followed by "%". This search may take a long time.

See Also

- Viewing All Users
- Creating a User
- Editing a User's Details
- Deleting a User
- Defining a User's Roles

- Defining a User's Account
- Defining a User's

2.8 Creating a New User

Certain types of users may only be created by a system administrator. For example, a system administrator creates primary users or other system administrators. Perform the following steps to create a new user.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to create a new user.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. Click **Create**.

   The User Registration window opens.
5. Select the type of user you want to create. Options include: Business User, Individual User, or Primary User.
6. Enter the user's information into the fields provided and click **Next**.
7. Select available enrollments as appropriate.
8. (Optional) Click **Clear** to clear the fields.
9. Click **Submit** to save.

See Also

- Viewing All Users
- Searching for a User
- Editing a User's Details
- Deleting a User

- Defining a User’s Roles
- Defining a User’s Account
- Defining a User’s Enrollment

2.9 Editing a User's Details

Perform the following steps to edit a user's information.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to edit a user’s details.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. If you do not need to search for the user, then skip to step 6.
5. If you need to search for the user, then:
   a. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.
   b. Enter a minimum of three characters into to the search field.

      The "%" and "_" (underscore) symbols are wildcards.
   c. Click **Go**.

      A list of search results appear in the window.
6. Click the username

   The User Details window opens.
7. Edit fields as desire.

   Fields marked with an asterisk are mandatory.
8. View the following links for information regarding:
   - Defining a User’s Roles

   - Defining a User's Account
   - Defining a User's Enrollment

9. Edit the information in the window and click **Update** to modify the information or click **Restore** to reset the original values in the window.

See Also

- Viewing All Users
- Searching for a User
- Creating a User
- Deleting a User

2.10 Deleting a User

Perform the following steps to delete a user.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to delete a user.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. If you do not need to search for the user, then skip to step 6.
5. If you need to search for the user, then:

   a. Select Last Name, First Name, or Username from the Enter Search Criterion drop-down list.

   b. Enter a minimum of three characters into to the search field.

      The "%" and "_" (underscore) symbols are wildcards.

   c. Click **Go**.

      A list of search results appear in the window.

6. Select the check box which corresponds to the user you want to delete.
7. Click **Delete User**.

   The Delete User window opens.
8. Click **Delete**.

   The user is deleted from the system.

See Also

- Viewing All Users
- Searching for a User
- Creating a User
- Editing a User's Details
- Defining a User's Roles
- Defining a User's Account
- Defining a User's Enrollment

2.11 Defining a User's Roles

Perform the following steps to define a user's role information.

Note: If you are the primary user of an organization, you are not able to define their role from this window.

Prerequisites

You must be the merchant administrator or a system administrator, of a company with the JTF_SECURITY_ASSIGN_ROLE permission to define a user's roles.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. Find the user who's role you want to define.

5. Click the username.

   The User Details window opens.

6. Click **Roles** to edit the user's role information.

   The User- Role Mapping window opens.

7. Select the name of a role in one list and click **>** or **<** to move it to the other list. You can hold down the [CTRL] key and use your mouse to select multiple roles.

   The administrator can only assign roles that they are assigned themselves.

8. Repeat step 11 as desired.

9. If you want to move all Available Roles to the Assigned Roles list, then click **>>** or to move all Assigned Roles to the Available Roles list, then click **<<**.

10. Click **Update** to modify the information or click **Restore** to reset the original values in the window.

See Also

- Viewing All Users
- Searching for a User
- Creating a User
- Editing a User's Details
- Deleting a User
- Defining a User's Account
- Defining a User's Enrollment

2.12 Defining a User's Account

Perform the following steps to define a user's account information.

> **Note:** If the user is not defined as a user type in the user management framework, you are not able to define their account from this window.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to define a user's account.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. Find the user who's role you want to define.
5. Click the username.

   The User Details window opens.
6. Click **Assign Account** to edit the user's account information.

   The Accounts window opens.
7. Select any accounts you want to assign to the user or enter a new account name in the account description field and click **Create**.

   The new account is added to the table.
8. Select the account and click **Update**.

See Also

- Viewing All Users
- Searching for a User
- Creating a User
- Editing a User's Details
- Deleting a User
- Defining a User's Roles
- Defining a User's Enrollment

2.13 Defining a User's Enrollment

Perform the following steps to define a user's enrollment.

Note: If the user is not defined as a user type in the user management framework you are not able to define their enrollments from this window.

Note: If you are viewing your own enrollments, you have access to available enrollments, that you can register for, depending on your roles and responsibilities.

Prerequisites

You must be the system administrator or the primary user of a company with the appropriate permissions to define a user’s enrollment.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **User Maintenance** on the side navigation bar.

   The Users window opens.
4. Find the user who’s role you want to define.
5. Click the username.

   The User Details window opens.
6. To edit the user's enrollments, click **Enrollments**.

   The User Enrollment Details window opens.
7. Select from the list of available enrollments and click **Enroll**. Only an individual user can sign up for enrollments. The administrator can only remove a user’s enrollments.

   The enrollment appears in the enrollment column.
8. To unenroll, select from the list of enrollments and click **Unenroll**.

See Also

- Viewing All Users
- Searching for a User

- Creating a User
- Editing a User's Details
- Deleting a User
- Defining a User's Roles
- Defining a User's Account

2.14 Creating a New Approval Type

An approval type is an optional component of the user registration process. Perform the following steps to create a new approval process.

Prerequisites

You must be the system administrator with the appropriate permissions to create a new approval type.

WARNING: The Use Pending Request Page check box should only be unchecked if your organization does not plan to use our pending approval window and intends to respond to all approvals through e-mails and the workflow notification window.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup**.

   The Available Approvals window opens.
5. Click **Create New Approval**.

   The Create Approval window opens.
6. Enter the approval information.

   a. Enter an Approval Key.

   b. Enter a name for the approval.

c. (Optional) Enter a description for the approval type.

d. Select a Workflow Item Type from the drop-down list. This list contains all workflows in the system, however, only those workflows coded to our standards will work with User Management.

e. Select an Application from the drop-down list.

f. (Optional) Select the **Use Pending Request Page** check box if you want the approval type to display during the registration process from the "Register Here" link.

g. Click **Next**.

   The Approver Selection Order window opens.

7. Enter the Approver Selection information.

   a. Enter a number to define the order that each approver gets the request.

   b. Enter the name of the first approver into the Approver1 field or click **Go** to search for an approvers name.

      A look up window opens.

   c. Enter your search criteria and click **Go**.

      The Search Results appear in the window.

   d. Select the option button for the user that you want to be the approver.

   e. Click **Add User**.

      The user's name appears in the text field.

   f. (Optional) Enter the name of additional approvers into the other Approver fields (repeat steps a-e).

   g. (Optional) Click **Cancel** to clear the fields.

   h. (Optional) Click **add 5 more rows** to add five empty approver fields.

8. Click **Submit** to save.

See Also

- Removing an Approval Type
- Searching for an Approval Type
- Editing an Approval Type's Details

- Enabling and Disabling Approval Types
- Searching for an Organization
- Viewing Approval Preferences
- Updating Approval Preferences

2.15 Removing an Approval Type

Prerequisites

You must be the system administrator with the appropriate permissions to remove an approval type.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup** in the side navigation bar.

   The Available Approvals window opens.
5. Select the check box in the Remove column that corresponds to the Approval that you plan to delete.
6. Click **Update** to delete the Approval or click **Restore** to reset the original values in the window.

   A confirmation window opens.
7. Click **Confirm and Update Now** to delete the Approval or click **Cancel** to cancel the deletion.

See Also

- Creating a New Approval Type
- Searching for an Approval Type
- Editing an Approval Type's Details
- Enabling and Disabling Approval Types
- Searching for an Organization

- Viewing Approval Preferences
- Updating Approval Preferences

2.16 Searching for an Approval Type

An approval type is an optional component of the user registration process. Perform the following steps to search for an approval type.

Prerequisites

You must be the system administrator with the appropriate permissions to search for an approval type.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup**.

   The Available Approvals window opens.
5. If you want to search by approval name, then:
   a. Select **Approval Name** from the drop-down list in the Search Approval area.
   b. Enter your search phrase into the text input field.
   c. Click **Go**.
   d. View your search results.
6. If you want to search by approval key, then:
   a. Select **Approval Key** from the drop-down list in the Search Approval area.
   b. Enter your search phrase into the text input field.
   c. Click **Go**.
   d. View your search results.

See Also

- Creating a New Approval Type

- Removing an Approval Type
- Editing an Approval Type's Details
- Enabling and Disabling Approval Types
- Searching for an Organization
- Viewing Approval Preferences
- Updating Approval Preferences

2.17 Editing an Approval Type's Details

An approval type is an optional component of the user registration process. Perform the following steps to edit an approval type's details.

Prerequisites

You must be the system administrator or the primary user with the appropriate permissions to edit an approval type's details.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup**.

   The Available Approvals window opens.
5. Click the name of the approval in the Approval Name column.

   The Update Approval window opens.
6. Edit the fields as desired and click **Next**.
7. Edit the information in the Update Approval window and click **Next**.
8. Edit the information in the approver selection order window and click **Submit**.

   The information is updated.

See Also

- Creating a New Approval Type
- Removing an Approval Type

- Searching for an Approval Type
- Enabling and Disabling Approval Types
- Searching for an Organization
- Viewing Approval Preferences
- Updating Approval Preferences

2.18 Enabling and Disabling Approval Types

Approval Types can be enabled or disabled at any time. Perform the following steps to enable or disable an approval.

Prerequisites

You must be the system administrator of a company with the appropriate permissions to change to status of an approval type.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup**.

   The Available Approvals window opens.
5. If you want to enable an approval, select **Enabled** from the drop-down list in the corresponding Status column.
6. If you want to disable an approval, select **Disabled** from the drop-down list in the corresponding Status column.
7. Click **Update** to modify the status of the approval type or click **Restore** to reset the original values in the window.

   A confirmation window opens.
8. Click **Confirm and Update All** to modify the status.

See Also

- Creating a New Approval Type

- Removing an Approval Type
- Searching for an Approval Type
- Editing an Approval Type's Details
- Searching for an Organization
- Viewing Approval Preferences
- Updating Approval Preferences

2.19 Searching for an Organization

Perform the following steps to search for an organization.

Prerequisites

You must be the system administrator with the appropriate permissions to search for an organization.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup**.

   The Available Approvals window opens.
5. Click **Organization** in the side navigation bar.

   The Organization window opens.
6. Select Organization Name, Company Number, or DUNS Number from the Enter Search Criterion drop-down list.
7. Enter a minimum of three characters into to the search field.

   The "%" and "_" (underscore) symbols are wildcards.
8. Click **Go**.

   A list of search results appears in the window.
9. Click the column heading to sort the row.

See Also

- Creating a New Approval Type
- Removing an Approval Type
- Searching for an Approval Type
- Editing an Approval Type's Details
- Enabling and Disabling Approval Types
- Viewing Approval Preferences
- Updating Approval Preferences

2.20 Viewing Approval Preferences

Use the approval preferences window to define an approval list for a specific organization. Perform the following steps to enable or disable an approval.

Prerequisites

You must be the system administrator with the appropriate permissions to view approval preferences.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup**.

   The Available Approvals window opens.
5. Click **Organization** in the side navigation bar.

   The Organization window opens.
6. Search for an organization.
   a. Select Organization Name, Company Number, or DUNS Number from the Enter Search Criterion drop-down list.
   b. Enter a minimum of three characters into to the search field.

      The "%" and "_" (underscore) symbols are wildcards.

c. Click **Go**.

   A list of search results appears in the window.

7. Click the Organization Name.

   The Approval Preferences window opens with a list of approval definitions for the specified organization.

See Also

- Creating a New Approval Type
- Removing an Approval Type
- Searching for an Approval Type
- Editing an Approval Type's Details
- Enabling and Disabling Approval Types
- Searching for an Organization
- Updating Approval Preferences

2.21 Updating Approval Preferences

Perform the following steps to update the organization's approval list.

Prerequisites

You must be the system administrator or the primary user with the appropriate permissions to update approval preferences for an organization.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Approval Setup**.

   The Available Approvals window opens.

5. Click **Organization** in the side navigation bar.

   The Organization window opens.

6. Search for an organization.

   a. Select Organization Name, Company Number, or DUNS Number from the Enter Search Criterion drop-down list.
   b. Enter a minimum of three characters into to the search field.

      The "%" and "_" (underscore) symbols are wildcards.
   c. Click **Go**.

      A list of search results appear in the window.

7. Click the Organization Name.

   The Approval Preferences window opens.
8. Click the approval list that you want to update.

   The Approver Selection Order window for the organization opens.
9. Enter the Approver Selection information.
   a. Enter a number to define the order that each approver gets the request.
   b. Enter the name of the first approver into the Approver1 field or click **Go** to search for an approvers name.
   c. Enter your search criteria and click **Go**.

      The Search Results appear in the window.
   d. Select the option button for the user that you want to be the approver.
   e. Click **Add User**.

      The user's name appears in the text field.
   f. (Optional) Enter the name of additional approvers into the other Approver fields (repeat steps a-e).
   g. (Optional) Click **Cancel** to clear the fields.
   h. (Optional) Click **add 5 more rows** to add five empty approver fields.
10. Click **Submit** to save.

See Also

- Creating a New Approval Type
- Removing an Approval Type
- Searching for an Approval Type

- Editing an Approval Type's Details
- Enabling and Disabling Approval Types
- Searching for an Organization
- Viewing Approval Preferences

2.22 Creating an Enrollment

An enrollment is an optional step in the user registration process. From the Create Enrollment window, you can define enrollments and approvals for enrollments. Each enrollment may or may not have a role associated with it. Perform the following steps to create an enrollment.

Prerequisites

You must be the system administrator or the primary user with the appropriate permissions to create an enrollment.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Enrollments** in the side navigation bar.

   The Available Enrollments window opens.
5. Click **Create New Enrollment.**

   The Create Enrollment window opens.
6. Define the following information:
   a. Enter an Enrollment Key.
   b. Enter a name for the new enrollment.
   c. (Optional) Enter a description for the new enrollment. This description can include HTML tags for style. There is a 2000 character limit in the field that includes all HTML tags.
7. Select roles and responsibilities.
   a. Select a responsibility from the Responsibility drop-down list. If no responsibility is required, choose **No Responsibility is Required**.

b. Select the name of a role in the Available list and click **>** to move it to the Assigned list. You can hold down the [CTRL] key and use your mouse to select multiple roles.

c. Repeat the previous step to add more roles to the list.

d. To move all Available Roles to the Assigned Roles list, then click **>>** or to move all Assigned Roles to the Available Roles list, then click **<<**.

e. Select an application from the drop-down list.

f. Select an approval from the drop-down list. If no approvals are required for the user to subscribe to the service, choose **No Approval Required**.

g. Select an enrollment template from the drop-down list.

8. (Optional) Click **Reset** to clear the fields.
9. Click **Create** to save your changes.

   A confirmation appears stating the enrollment was created successfully.

See Also

- Defining a User's Enrollment
- Removing an Enrollment
- Enabling and Disabling Enrollments
- Editing an Enrollment's Details

2.23 Removing an Enrollment

Perform the following steps to delete an enrollment.

Prerequisites

You must be the system administrator with the appropriate permissions to delete an enrollment.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.

4. Click **Enrollments** in the side navigation bar.

   The Available Enrollments window opens.

5. Select the check box in the Remove column that corresponds to the enrollment that you plan to delete.

6. Click **Update** to remove the enrollment or click **Restore** to reset the original values in the window.

   A confirmation window opens.

7. If you are sure you want to delete the enrollment, click **Confirm and Update Now**.

See Also

- Defining a User's Enrollment
- Creating an Enrollment
- Enabling and Disabling Enrollments
- Editing an Enrollment's Details

2.24 Enabling and Disabling Enrollments

An enrollment is an optional step in the user registration process. Perform the following steps to enable or disable an enrollment.

Prerequisites

You must be the system administrator with the appropriate permissions to modify the status of an enrollment.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.

2. Select the Users tab.

3. Click **Setup** on the main navigation bar.

4. Click **Enrollments** in the side navigation bar.

   The Available Enrollments window opens.

5. If you want to enable an enrollment, select **Enabled** from the drop-down list in the corresponding Status column.

6. If you want to disable an enrollment, select **Disabled** from the drop-down list in the corresponding Status column.
7. Click **Update** to modify the information or click **Restore** to reset the original values in the window.

   A confirmation window opens.
8. Click **Confirmed and Update Now**.

   The enrollment status is modified.

See Also

- Defining a User’s Enrollment
- Creating an Enrollment
- Removing an Enrollment
- Editing an Enrollment’s Details

2.25 Editing an Enrollment's Details

An enrollment is an optional step in the user registration process. Perform the following steps to edit an enrollment's details.

Prerequisites

You must be the system administrator with the appropriate permissions to edit an enrollment’s details.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Enrollments** in the side navigation bar.

   The Available Enrollments window opens.
5. Click the name of the enrollment.

   The Update Enrollment window opens.
6. Edit the fields as desired and click **Next**.

7. Select the **Assign the changed role to existing users of this Enrollment** check box if you want previously registered users to be granted the specified role.
8. Assign new roles as needed.
9. Select the **Assign the changed responsibility to existing users of this Enrollment** check box if you want previously registered users to be granted the specified responsibility.
10. (Optional) Click **Reset** to reset the fields to their original settings or click **Update** to save your changes.

    A confirmation window opens.

See Also

- Defining a User's Enrollment
- Creating an Enrollment
- Removing an Enrollment
- Enabling and Disabling Enrollments

2.26 Creating a User Type

A user type is a category of users based on common responsibilities and roles. Oracle is shipping predefined user types in the 11.5.6 release (Primary, Business, and Individual users) and defined enrollments attached to these user types out-of-the-box. These enrollments include different roles and responsibilities. If you are a legacy user uptaking the new user management framework, you no longer have access to the default roles and responsibilities windows. The user type definition replaces these windows. Roles and responsibilities defined at the user level are the default. Perform the following steps to create a new user type.

Prerequisites

You must be the system administrator with the appropriate permissions to create a new user type.

Note: If you deselect the Enabled Self-service Registration check box when you create a new user type, the user type does not appear in the self-service registration window when you click the "Register Here" link unless the user has the JTF_SECURITY_ASSIGN_ROLE permission. At runtime, the system validates that the user has this permission, if not, it confirms if the check box is selected and only show the user types that are available for self-service.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **User Types** in the side navigation bar.

   The Available User Types window opens.
5. Click **Create New User Type**.

   The User Type Details window opens.
6. Define the following information:
   a. Enter a user type name.
   b. Enter a user type key.
   c. (Optional) Enter a description into the Description field. This description can include HTML tags for style. There is a 2000 character limit in the field that includes all HTML tags.
   d. (Optional) Select **Enable Self-service Registration** to display the new user type during the registration process from the "Register Here" link.
   e. Use the drop-down list to select the registration template default. Options include: Business, Individual, or Primary user.
   f. Use the drop-down list to select the approval by information. For example, JTF User Approval or No approval is required.
7. Click **Next** to save and go on to the next form.

   The Roles and Responsibilities window opens.
8. Define the following information:

   a. Use the drop-down list to select a user type responsibility.

   b. (Optional) Select the **Assign the changed responsibility to existing users of this user type** check box if you want other users registered under this user type to be granted the responsibility specified. If no change is made to the responsibility, no update occurs.

   c. To assign roles, select the name of a role in one list and then click **>** or **<** to move it to the other list. Repeat this step for as many roles you want to assign.

   d. If you want to move all Available Roles to the Assigned Roles list, then click **>>**.

   e. If you want to move all Assigned Roles to the Available Roles list, then click **<<**.

   f. (Optional) Select the **Assign the changed role to existing users of this user type** check box if you want other users registered under this user type to be granted the role specified. If no change is made to the roles, no update occurs.

9. Click **Next** to save and go on to the next form or click **Restore** to revert back to the original values in the window.

   The Enrollments window opens.

10. Define the following information:

   a. If you want to activate an enrollment for a user type, select **Yes** from the drop-down list in the Enroll column.

   b. If you do not want to enroll the user type in an enrollment, select **No** from the drop-down list in the Enroll column.

   c. Select **Implicit** or **Explicit** from the drop-down lists to define the activation mode.

   d. Enter a number into the fields in the Order column to set enrollment order.

   e. If you want to edit an enrollment's details, then click the name of the enrollment.

11. Click **Next** to save and go on to the next form or click **Restore** to revert back to the original values in the window.

   The User Types window opens with the newly created user type added to the table.

See Also

- Removing a User Type
- Activating and Deactivating User Types
- Searching for a User Type
- Editing a User Type's Details

2.27 Removing a User Type

A user type is a category of users based on common responsibilities and roles. A user type can be removed as long as it is not enabled (in use). Perform the following steps to remove a user type.

Prerequisites

You must be the system administrator with the appropriate permissions to remove a user type.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **User Types** in the side navigation bar.

   The Available User Types window opens.
5. Select the check box in the Remove column that corresponds to the user type that you want to delete.
6. Click **Update** to delete the User Type or click **Restore** to reset the original values in the window.

   A confirmation window opens.
7. Click **Confirm** to delete the User Type or click **Cancel** to cancel the deletion.

See Also

- Creating a User Type
- Activating and Deactivating User Types
- Searching for a User Type

- Editing a User Type's Details

2.28 Activating and Deactivating User Types

A user type is a category of users based on common responsibilities and roles. Perform the following steps to activate or deactivate a user type.

Prerequisites

You must be the system administrator with the appropriate permissions to modify the status of a user type.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **User Types** in the side navigation bar.

   The Available User Types window opens.
5. If you want to activate an enrollment, select **Active** from the drop-down list in the corresponding Status column.
6. If you want to deactivate an enrollment, select **Inactive** from the drop-down list in the corresponding Status column.
7. Click **Update** to modify the status of the user type or click **Restore** to reset the original values in the window.

See Also

- Creating a User Type
- Removing a User Type
- Searching for a User Type
- Editing a User Type's Details

2.29 Searching for a User Type

A user type is a category of users based on common responsibilities and roles. Perform the following steps to search for a user type.

Prerequisites

You must be the system administrator with the appropriate permissions to search for a new user type.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **User Types** in the side navigation bar.

   The Available User Types window opens.
5. If you want to search by the User Type Name, then:
   a. Enter your search phrase into the text input field.
   b. Click **Go**.

      The results appear in the window.
6. If you want to search by the User Type Key, then:
   a. Enter your search phrase into the text input field.
   b. Click **Go**.

      The results appear in the window.

See Also

- Creating a User Type
- Removing a User Type
- Activating and Deactivating User Types
- Editing a User Type’s Details

2.30 Editing a User Type's Details

A user type is a category of users based on common responsibilities and roles. Perform the following steps to edit a user type's details.

Prerequisites

You must be the system administrator with the appropriate permissions to modify the user type's details.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **User Types** in the side navigation bar.

   The Available User Types window opens.
5. Click the name of the user type in the User Type Name column.

   The User Type Details window opens.
6. Edit the fields as desired.
7. (Optional) Click **Clear** to reset the fields to their original settings.
8. Click **Next** to save and go on to the next form.

   The Roles and Responsibilities window opens.
9. Edit the information as needed.

   a. Use the drop-down list to select a user type responsibility.

   b. (Optional) Select the **Assign the changed responsibility to existing users of this user type** check box if you want other users registered under this user type to be granted the responsibility specified.

   c. To assign roles, select the name of a role in one list and then click **>** or **<** to move it to the other list. Repeat this step for as many roles you want to assign.

   d. If you want to move all Available Roles to the Assigned Roles list, then click >>.

   e. If you want to move all Assigned Roles to the Available Roles list, then click <<.

   f. (Optional) Select the **Assign the changed role to existing users of this user type** check box if you want other users registered under this user type to be granted the role specified.

10. Click **Next** to save and go on to the next form or click **Restore** to revert back to the original values in the window.

    The Enrollments window opens.

11. Edit the information as needed.

    a. If you want to enroll the user type in an enrollment, select **Yes** from the drop-down list in the Enroll column.

    b. If you do not want to enroll the user type in an enrollment, select **No** from the drop-down list in the Enroll column.

    c. Select **Implicit** or **Explicit** from the drop-down lists to define the type.

    d. Enter a number into the fields in the Order column to set enrollment order.

    e. If you want to edit an enrollment's details, then click the name of the enrollment.

12. Click **Next** to save and go on to the next form or click **Restore** to revert back to the original values in the window.

    The User Types window opens with the newly updated user type information.

See Also

- Creating a User Type
- Removing a User Type
- Activating and Deactivating User Types
- Searching for a User Type

2.31 Creating a Template

A template is an application-specific set of JSPs that you can use to customize the user registration process. There are two template categories, user types and enrollments. Perform the following steps to create a template.

Prerequisites

You must be the system administrator with the appropriate permissions to create a new template.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Templates** on the side navigation bar.

   The Available Templates window opens.
5. Click **Create New Template**.

   The Create Template window opens.
6. Enter the following required information.
   a. Enter the template key.
   b. Enter a name for the template.
   c. (Optional) Enter a description for the template.
   d. Select a template type from the drop-down list. Options include user type template or enrollment template.
   e. Enter the name of the template handler. The template handler is a java class implemented by the application to handle the registration data at runtime.
   f. Enter the name of JSP page that is the first window of the template flow into the Page Name field. The extension of the window must be ".jsp".
   g. Select an application from the drop-down list.
7. (Optional) Click **Reset** to clear the fields.
8. Click **Create** to save your information.

See Also

- Removing a Template
- Enabling and Disabling Templates
- Editing a Template's Details
- Searching for a Template

2.32 Removing a Template

A template is an application-specific set of JSPs that you can use to customize the user registration process. Perform the following steps to delete a template.

Prerequisites

You must be the system administrator with the appropriate permissions to remove a template.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Templates** on the side navigation bar.

   The Available Templates window opens.
5. Select the check box in the Remove column that corresponds to the template that you want to delete.
6. Click **Update** to delete the template or click **Restore** to reset the original values in the window.

   A confirmation window opens.
7. Click **Confirm Update** to delete the template or click **Cancel** to return to the Available Templates window.

See Also

- Creating a Template
- Enabling and Disabling Templates
- Editing a Template's Details
- Searching for a Template

2.33 Enabling and Disabling Templates

A template is an application-specific set of JSPs that you can use to customize the user registration process. A template can be assigned to many enrollments and user types. Perform the following steps to enable or disable a template.

Prerequisites

You must be the system administrator with the appropriate permissions to modify the status of a template.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Templates** on the side navigation bar.

   The Available Templates window opens.
5. If you want to enable a template, select **Enabled** from the drop-down list in the corresponding Status column.
6. If you want to disable a template, select **Disabled** from the drop-down list in the corresponding Status column.
7. Click **Update** to modify the template's status or click **Restore** to reset the original values in the window.

   A confirmation window opens.
8. Click **Confirm Update** to modify the template's status or click **Cancel** to return to the Available Templates window.

See Also

- Creating a Template
- Removing a Template
- Editing a Template's Details
- Searching for a Template

2.34 Editing a Template's Details

A template is an application-specific set of JSPs that you can use to customize the user registration process. Perform the following steps to edit a template's details.

Prerequisites

You must be the system administrator with the appropriate permissions to modify a template's details.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.
2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Templates** on the side navigation bar.

   The Available Templates window opens.
5. Click the name of the template in the Template Name column.

   The User Management: Update Template window opens.
6. Edit the fields as desired.
7. (Optional) Click **Clear** to reset the fields to their original settings.
8. Click **Update** to save your changes.

See Also

- Creating a Template
- Removing a Template
- Enabling and Disabling Templates
- Searching for a Template

2.35 Searching for a Template

A template is an application-specific set of JSPs that you can use to customize the user registration process. Perform the following steps to search for a template.

Prerequisites

You must be the system administrator with the appropriate permissions to search for a template.

Steps

1. Log in to the CRM System Administrator Console as a system administrator.

2. Select the Users tab.
3. Click **Setup** on the main navigation bar.
4. Click **Templates** on the side navigation bar.

   The Available Templates window opens.
5. Select how you want to search for the template. Options include Template Name or Template Key from the drop-down list.
6. Enter your search criteria into the text field.
7. Click **Go**.

   Your search results appear in the window.

See Also

- Creating a Template
- Removing a Template
- Enabling and Disabling Templates
- Editing a Template's Details

2.36 Managing Security

You can perform the following tasks from the Security subtab:

- Viewing Security Alerts
- Managing Roles
  - Creating Roles
  - Mapping Permissions to a Role
- Managing Permissions
  - Creating Permissions
  - Assigning a Permission to Roles

For information on Security concepts, see Understanding Security.

2.37 Managing Roles

A role is a grouping of one or more permissions. Use this procedure to manage roles.

Prerequisites

- Read Understanding Security
- Navigate to **Settings** > **Security** > **Access Controls** > **Roles**

Steps

1. If you want to create a new role, then click **Create**.

   This opens the page where you edit the details of a new role.

2. If you want to use the search for a role, then:

   a. Type your search phrase into the Find Roles field.

   b. Click **Go**.

      The search results display.

3. Optionally, click **First**, **Previous**, **Next**, **Last**, or an option from the drop-down list to navigate within the table.

4. If you want to map permissions to a particular role, then click the name of a role in the Role column of the table.

   This opens the page where you map permissions to a role.

5. If you want to delete a role, then:

   a. Select the appropriate check box in the Remove column of the table. If the check box is disabled, then you cannot remove the role.

   b. Optionally, click **Restore** to reset the fields to their original settings.

   c. A new screen displays, asking you to confirm that you want to delete the role. To cancel, click **Cancel**. To delete the role, click **Update**.

      The role is removed and revoked from all users who are assigned to the role.

2.38 Creating Roles

Use this procedure to create a new role.

Prerequisites

- Read Understanding Security
- Navigate to **Settings** > **Security** > **Access Controls** > **Roles**, then click **Create**

Steps

1. Type a new role name into the Name field.

   The first two or three letters of a role name correspond to the module shortcode. Role names can be similar but not identical.
2. Type a description of the role into the Description field.
3. Select the Data check box, if applicable.
4. Optionally, click **Clear** to clear the content of the fields.
5. Optionally, click **Back to Summary Page** to return to the main Roles page.
6. Click **Update** to save.

   The new role is filed in alphabetical order.

2.39 Mapping Permissions to a Role

A role is a grouping of one or more permissions. Use this procedure to map permissions to a role.

Prerequisites

- Read Understanding Security
- Navigate to **Settings** > **Security** > **Access Controls** > **Roles**, then click the name of a role in the table

Steps

1. Choose the name of a permission in one list and click > or < to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all Available Permissions to the Assigned Permissions list, then click >>.
4. If you want to move all Assigned Permissions to the Available Permissions list, then click <<.

5. Optionally, click **Restore** to reset the fields to their original values.
6. Click **Update** to save.

2.40 Managing Permissions

A permission has a name and a description. Use this procedure to manage permissions.

WARNING! **Do not remove the pre-defined permissions that are built into the System Administrator Console. These pre-defined permissions are essential for stable and reliable performance of all Oracle CRM modules. Removal of these permissions could cause serious or fatal performance problems.**

Prerequisites

- Read Understanding Security
- Navigate to **Settings > Security > Access Controls > Permissions**

Steps

1. If you want to create a new permission, then click **Create**.

   This opens the page where you edit the details of a new permission.

2. If you want to search for a permission, then:

   a. Type your search phrase into the text input field.

   b. Click **Go**.

      The search results display.

3. Optionally, click **First**, **Previous**, **Next**, **Last**, or an option from the drop-down list to navigate within the table.

4. If you want to assign a permission to roles, then click the name of a permission in the table.

   This opens the page where you assign a permission to roles.

5. If you want to delete a permission, then:

   a. Select the appropriate check box in the Remove column of the table.

b. Optionally, click **Restore** to reset the fields to their original settings.

c. Click **Update** to save.

The permission is removed.

2.41 Creating Permissions

Use this procedure to create a new permission.

Prerequisites

- Read Understanding Security
- Navigate to **Settings** > **Security** > **Access Controls** > **Permissions**, then click **Create**

Steps

1. Type a new permission name into the Name field.

   The first two or three letters of a role name correspond to the module shortcode. Role names can be similar but not identical.

2. Type a description of the permission into the Description field.
3. Select the Data check box, if applicable.
4. Optionally, click **Clear** to clear the content of the fields.
5. Optionally, click **Back to Summary Page** to return to the main Permissions page.
6. Click **Update** to save.

   The new permission is filed in alphabetical order.

2.42 Assigning a Permission to Roles

Use this procedure to assign a permission to roles.

Prerequisites

- Read Understanding Security
- Navigate to **Settings** > **Security** > **Access Controls** > **Permissions**, then click the name of a permission in the table

Steps

1. Choose the name of a role in one list and click **>** or **<** to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all Available Roles to the Assigned Roles list, then click **>>**.
4. If you want to move all Assigned Roles to the Available Roles list, then click **<<**.
5. Optionally, click **Restore** to reset the fields to their original values.
6. Click **Update** to save.

2.43 Using Site Preferences

Site Preferences are features that allow you to personalize your deployment of CRM applications.

You can perform the following tasks from the Site Preferences subtab:

- Setting Up Navigation Groups
- Editing Navigation Group Details

For information on Site Preferences concepts, see Understanding Site Preferences.

2.44 Setting Up Navigation Groups

Use the following procedure to set up Navigation Groups, which are the links in the Interapplication Bar that represent customizable sets of applications with defined responsibility settings. The Interapplication Bar is the group of links that display at the top of every page in HTML-based CRM applications.

Prerequisites

- Read Understanding Site Preferences
- Navigate to **Settings** > **Site Preferences** > **Interapplication Bar** > **Navigation Group Setup**

Steps

1. Type Navigation Group names and descriptions into the Group Name and Description fields.
2. For each Navigation Group, choose Active or Inactive from the drop-down list in the Status column.

Only active groups display on the Interapplication Bar.

3. Type numbers into the Display Order fields to set the order of the Navigation Groups within the Interapplication Bar (from left to right).

4. Optionally, click the icon in the Detail column.

   This opens the page where you map CRM applications to a Navigation Group.

5. If you want to remove an application group, then select the appropriate check box in the Remove column of the table.

6. Click **Update** to save.

2.45 Editing Navigation Group Details

Use this procedure to map CRM applications to Navigation Groups. A Navigation Group is a customizable set of applications with defined responsibility settings that is launched when you click its link in the Interapplication Bar. The Interapplication Bar displays at the top of every page in HTML-based CRM applications.

Prerequisites

- Read Understanding Site Preferences.
- Navigate to **Settings > Site Preferences > Interapplication Bar > Navigation Group Details**

Steps

1. Choose a Navigation Group from the drop-down list.

   The page refreshes to display additional fields.

2. Choose the name of an application in one list and click **>** or **<** to move it to the other list.

3. Repeat step 2 as desired.

4. If you want to move all Available Applications to the Selected Applications list, then click **>>**.

5. If you want to move all Assigned Applications to the Selected Applications list, then click **<<**.

6. Optionally, click **Restore** to reset the fields to their original values.

7. Click **Update** to save.

2.46 Using the System Subtab

In the System subtab, you can define the system level properties that you need to set up during deployment. You can reconfigure the properties later as necessary.

You can perform the following tasks from the System subtab:

- Setting Up the Self Service User
- Setting Up Branding
- Setting Up Cookies
- Setting Up Sessions
- Setting Up Logging Trails
- Setting Up Categories
- Managing Properties
- Editing the Details of Keys
- Setting Up Password Expiration

For information on System subtab concepts, see Understanding the System Subtab.

2.47 Setting Up the Self Service User

You must set up a self service user (guest user) after deploying applications. This procedure allows you to grant privileges to new users during self registration. Use the following procedure to set up the self service user.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings** > **System** > **Properties** > **Self Service User**

Steps

1. Type a name into the Name field.
2. Type a password with at least six characters into the Password field.
3. Confirm the password by retyping it into the Retype Password field.
4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Update** to save.

2.48 Setting Up Branding

Branding is the wording that displays at the top left of every application page. You can customize the branding once the application has been deployed at a customer site.

The branding can be defined at both application level and responsibility level. A responsibility can only belong to one application and an application can have multiple responsibilities. If the branding for a particular responsibility is not set, the branding for all responsibilities within the application (application level) will be used. If the branding for a particular responsibility is set, the branding will take precedence and override the branding set at application level.

For example, for the application CRM Foundation, you could set the branding to "Admin Console" at application level (the default for all responsibilities). Given two CRM Foundation users, one with the CRM Administrator responsibility and the other with the HTML Foundation User responsibility, when they log in, both will see "Admin Console."

However, if you customize the branding for the HTML Foundation User responsibility to "HTML User," then when those users log in they will see "HTML User." Users having the responsibility CRM Administrator will still see "Admin Console."

Use this procedure to set up branding.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings > System > Properties > Branding**

Steps

1. Choose an application from the Application Name drop-down list.
2. Choose which responsibility applies to the branding from the Responsibility Name drop-down list. In some cases, you may only have one option, **Default Branding for this Application**.
3. Type into the Branding Name field to set the branding.
4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Update** to save.

   The page refreshes to display a preview of the new branding.

2.49 Setting Up Cookies

Cookies store information about users and systems as users log in to applications. Use this procedure to set up cookies.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings > System > Properties > Cookies**

Steps

1. Type the name of the cookie into the Name field.

   The name will be given the database ID as a prefix.
2. Choose **browser** or **URL** from the Type drop-down list.

   This sets whether browser cookies or URL rewriting is used.
3. Type the encryption key into the Encryption Key field.
4. Type a number into the Expiration Time field.

   This is the number of expiration units (time intervals) that pass before the cookie expires. Set the expiration unit below.
5. Choose **Day**, **Hour**, or **Minute** from the Expiration Unit drop-down list.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

2.50 Setting Up Sessions

Sessions are system properties that track the activity of users and whether or not users have left the domain. Use this procedure to set up sessions.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings > System > Properties > Sessions**

Steps

1. Complete the Applications Sessions section.

a. Type a number of hours into the ICX Time Limit field.

b. Type a maximum number of requests into the ICX Connection Limit field.

c. Type a number of minutes into the Inactive Session Timeout field.

2. Complete the Sticky Sessions section.

When using Sticky Sessions, all requests from the same user session will attempt to go to the same JVM, regardless of whether the application is in stateless mode or stateful mode. Sticky Sessions allow for several performance enhancements. In particular, the hit ratio of middle tier caching is improved because all cached data for a particular user resides on a single JVM rather than being scattered across different JVM instances. In addition, session attributes and resources will not have to be recreated and duplicated across different JVMs, but can be reused in the JVM associated with the session.

a. Choose **True** or **False** from the Sticky Session Flag drop-down list.

b. Type a number of milliseconds into the Cleanup Time Interval field.

c. Type a number of minutes into the Session Context Inactive Time Limit field.

d. Choose **True** or **False** from the Connection Reuse Flag drop-down list.

3. Optionally, click **Restore** to reset the fields to their original settings.

4. Click **Update** to save.

2.51 Setting Up Logging Trails

Loggings are system properties that you set up to debug any system-related codes. Framework Logging is used by the CRM Technology Foundation, while Service Logging is used by all applications. They are particularly useful during early deployment. Use this procedure to set up loggings.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings > System > Properties > Logging Trails**

Steps

1. Complete the Framework Logging Options section.

a. Type the name of the file to be used for logging into the File Name field.

   b. Choose **Debug**, **Fatal**, or **None** from the Level drop-down list.

2. Complete the Service Logging Options section.
   a. Type the name of the file to be used for logging into the File Name field.
   b. Choose **Debug**, **Fatal**, or **None** from the Level drop-down list.
   c. Choose **File** from the Mode field.
   d. Choose **FIFO** or **LIFO** from the Pool field.
3. Optionally, click **Restore** to reset the fields to their original settings.
4. Click **Update** to save.

2.52 Setting Up Property Categories

Use this procedure to set up applications in the system properties framework during the development phase.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings > System > Properties > Category**

Steps

1. Choose an application from the Application Name drop-down list.
2. Choose **Read** or **Update** from the READ/UPDATE drop-down list.
3. Optionally, click **Restore** to reset the fields to their original settings.
4. Click **Next**.

   This opens the page where you can map this permission to one or more roles.

2.53 Managing Properties

A property is a key/value pair that is application-specific. A key is what is used by an application to retrieve data. Keys are unique, but can have multiple values. Values are the content or data that binds to a particular key. Use this procedure to create and manage properties.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings > System > Properties > Advanced**

Steps

1. Choose a module shortcode from the View drop-down list.

   The page refreshes to display the properties registered for that module.

2. If you want to create a key, then click **Create**.

   This opens the page where you specify the details of a new key.

3. Optionally, click **First**, **Previous**, **Next**, and **Last** to navigate within the table.
4. If you want to view or modify the details of a key, then click a key name in the table.

   This opens the page where you view or edit the details of an existing key.

5. If you want to remove a key, then select the appropriate check box in the Remove column of the table.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

2.54 Editing the Details of Keys

A property is a key/value pair that is application-specific. A key is what is used by an application to retrieve data. Keys are unique, but can have multiple values. Values are the content or data that binds to a particular key. Use this procedure to edit the details of new or existing keys.

Prerequisites

- Read Understanding the System Subtab
- Navigate to **Settings > System > Properties > Advanced**, then either click **Create** or click the name of a key in the table.

Steps

1. Type a key name into the Key field.
2. Edit the table.

a. Type values into the Value fields as desired.
b. Type sequence numbers into the Sequence fields as desired.
c. If you want to remove a value, then select the appropriate check box in the Remove column.
d. Optionally, click **More Rows** to add empty rows to the table.

3. If you want to resequence the key, then click **Resequence**.
4. If you want to copy the key, then click **Copy Key**.
5. If you are creating a new key and want to clear the fields, then click **Clear**.
6. If you are editing an existing key and want to restore the fields to their original settings, then click **Restore**.
7. Click **Update** to save.

2.55 Setting Up Password Expiration

Use this procedure to define for how many days a password is valid.

Prerequisites

None

Steps

1. Type a non-negative integer into the field. This is the number of days after which passwords will expire.
2. Optionally, click **Restore** to reset the field to its original setting.
3. Click **Update** to save. Upon saving, the value saved is only effective for passwords created or updated from this moment on.

2.56 Managing Configuration

You can perform the following tasks from the Configuration subtab:

- Setting Up Hosts
- Editing Host Details
- Editing Resource Settings

For information on Configuration concepts, see Understanding Configuration.

2.57 Setting Up Hosts

The Hosts Setup page is the starting point for viewing, creating, updating, and removing hosts. Use this procedure to manage hosts.

Prerequisites

- Read Understanding Configuration
- Navigate to **Deployment > Configuration > Hosts**

Steps

1. If you want to register a host, then click **Create**.

   This opens the page where you edit the details of a new host. You must register all mid-tier hosts.

2. If you want to modify the attributes of a host, then click a name in the Host Name column.

   This opens the page where you edit the details of an existing host.

3. If you want to remove a host, then:

   a. Select a check box in the Remove column.

   b. Optionally, click Restore to reset the fields to their original settings.

   c. Click **Update** to save.

2.58 Editing Host Details

Use this procedure to edit the details of new or existing hosts.

Prerequisites

- Read Understanding Configuration
- Navigate to **Deployment > Configuration > Hosts**, then either click **Create** or click the name of a host in the table

Steps

1. Edit the Hostname field:

   a. If you are creating a new host, then type the name of the mid-tier URL into the Hostname field.

For example, "computer.us.oracle.com."

   b. If you are updating an existing host, then you cannot edit this field.

2. Type a description into the Description field.
3. Ignore the Utilize Look-ahead Cache check box.
4. Edit port numbers:
   a. Type the port number where the Apache in this mid-tier host runs into the first Port field.

      For example, "9999"

   b. If there are multiple Apache instances running on the same mid-tier host, then type additional port numbers into the Port column.

      For example, "9999" and "8080"

   c. If you want to remove a port, then select the appropriate check box in the Remove column.
5. Edit application deployment:

   This information is used by the caching framework to cache and prime only the data for the configured set of applications.

   a. Choose the name of an application in one list and click > or < to move it to the other list.
   b. Repeat step a as desired.
   c. If you want to move all Available Applications to the Deployed Applications list, then click >>.
   d. If you want to move all Deployed Applications to the Available Applications list, then click <<.
6. Optionally, if you are creating a new host and want to clear the fields, then click **Clear**.
7. Optionally, if you are updating an existing host and want to reset the fields to their original settings, then click **Restore**.
8. If you are creating a new host, then click **Create** to save.
9. If you are updating an existing host, then click **Update** to save.

2.59 Editing Resource Settings

Use this procedure to manage resource settings for the cache.

Prerequisites

- Read Understanding Configuration
- Navigate to **Deployment > Configuration > Resource Settings**

Steps

1. Define cache resource settings:
   a. Type a number of megabytes into the Disable Cache if Total Memory Exceeds field.

      Typically this represents a percentage of the maximum memory of the JVM.
2. Ignore the Define Look-ahead Cache Resource Settings section.
3. Optionally, click **Restore** to reset the fields to their original settings.
4. Click **Update** to save.

2.60 Viewing System Alerts

The System Alerts page displays statistics regarding the health of a deployed system. It complements the Diagnostics framework to guide you when troubleshooting failures or misconfigurations. Use this procedure to view system diagnostics data.

Prerequisites

- Navigate to **Deployment > System Statistics > System Alerts**, or to see Security-related alerts, navigate to **Settings > Security > Alerts Monitor**

Steps

1. If you are in the Deployment tab, then:
   a. Choose "All Applications" or a specific application from the Application drop-down list.
   b. Choose "All Nodes" or a specific node (host) from the Node drop-down list.
   c. Choose which statuses you want to display (**All Status, Succeeded, Failed**, or **Warning**) from the Status drop-down list. Click **Go** to run the filter.

d. Optionally, click the calendar icons next to the From and To fields to select a date range. Click **Go** to run the filter.

e. View the data displayed on the Monitor board.

2. If you are in the Settings tab, then you see only security-related tests:

a. If you want to run the test group on a specific host, then choose the host name from the drop-down list.

The page refreshes to display an additional drop-down list.

b. Choose a launch type from the second drop-down list.

c. Click **Launch** to run the tests.

d. View the results in the colored table below.

2.61 Viewing Jserv Statistics

Use this procedure to view the Jserv statistics of a particular host.

Prerequisites

- Navigate to **Deployment > System Statistics > Jserv Statistics**
- Have the full host name ready to type in (for example, computer.companyname.oracle.com:8888)
- Optionally, have the Jserv ID ready to type in (for example, test.js1)

Steps

1. Type a host name into the Hostname field.
2. Optionally, type a Jserv ID into the Jserv ID field.
3. Click **Submit**.

   A new page displays.
4. View memory, thread, connection pool, session, and services statistics.
5. Optionally, click **Back** to go to the previous page.

2.62 Using Diagnostics

Note: You can also navigate to the CRM Diagnostics page by typing the following URL into a Web browser: http://*hostname*:*portnumber*/OA_HTML/jtfqalgn.htm

This is particularly useful if the deployment is having startup problems.

You can perform the following tasks from CRM Diagnostics:

Running Test Groups

In the Basic tab, you can run groups of tests either all at once or individually.

Running Tests

In the Advanced tab, you can run tests one at a time. If desired, you can specify input values that are different from the defaults.

Managing Test Groups

Creating Test Groups

Updating Test Groups

Managing Tests

Registering Tests

Setting Default Test Input Values

Managing Applications

In the Configuration tab, you can set up the applications, test groups, and tests that are used in Diagnostics.

For information on Diagnostics framework concepts, see Understanding Diagnostics.

2.63 Running Test Groups

You can perform the following tasks from the Basic tab:

Running All Test Groups

Running One Test Group

For information on Diagnostics framework concepts, see Understanding Diagnostics.

2.64 Running All Test Groups

Test groups are logical sets of one or more related tests. Tests verify the correct behavior of a particular feature or function. Use this procedure to run all test groups on an application.

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Basic** tab

Steps

1. Choose an application from the Application drop-down list.
2. Click **Run All Groups**.
3. View the test results.
4. If you want to view a detailed summary of a test, then click the icon in the Report column.

2.65 Running One Test Group

Test groups are logical sets of one or more related tests. Tests verify the correct behavior of a particular feature or function. A group can have one or more other groups as prerequisites. Use this procedure to run a specific test group on an application.

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Basic** tab

Steps

1. Choose an application from the Application drop-down list.
2. Click the name of the test group.

3. If you want to run the test group's prerequisite group or groups, then click **Run With Prerequisite**.

   You can view the names of the prerequisite group or groups in the Prerequisites drop-down list.

4. If you want to run the test group alone, then click **Run Without Prerequisite**.
5. View the test results.
6. If you want to view a detailed summary of a test, then click the icon in the Report column.

2.66 Running Tests

Tests verify the correct behavior of a particular feature or function. Use this procedure to run a test on an application.

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Advanced** tab

Steps

1. Choose an application from the Application drop-down list.
2. Click the name of the test.
3. If you want to specify your own input values, then type them into the appropriate fields. Otherwise, the test runs using default values.
4. Click **Run Test**.
5. View the test results.
6. If you want to view a detailed summary of a test, then click either the icon in the Report column or **View Report**.

2.67 Managing Test Groups

The main page for test groups is the starting point for viewing, creating, updating, prioritizing, and removing test groups. Test groups are logical sets of one or more related tests. Tests verify the correct behavior of a particular feature or function. Use this procedure to manage test groups. This procedure is not applicable to the application "HTML Platform."

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Configuration** tab, choose an application from the drop-down list, then choose **Groups**.

Steps

1. If you want to create a new test group, then click **Create**.

   This opens the page where you edit the details of a new test group.

2. If you want to update an existing test group, then click the Group Name.

   This opens the page where you edit the details of an existing test group.

3. If you want to change the test group sequence, then choose the appropriate numbers from the drop-down lists in the Sequence column.
4. If you want to remove a test group, then select the appropriate check box in the Remove column.
5. Optionally, click **Restore** to reset the fields to their original settings.
6. Click **Update** to save.

2.68 Creating Test Groups

Test groups are logical sets of one or more related tests. Tests verify the correct behavior of a particular feature or function. A test group can have one or more other groups as prerequisites. Use this procedure to create test groups. This procedure is not applicable to the application "HTML Platform."

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Configuration** tab**,** choose an application from the drop-down list, choose **Groups**, then click **Create**

Steps

1. Type the name of the test group into the Group Name field.
2. If you want to set Group Prerequisites, then choose from the drop-down lists in the Group Name column.
3. Optionally, click **More Prerequisites** to add more rows to the table.

4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Create** to save.

2.69 Updating Test Groups

Test groups are logical sets of one or more related tests. Tests verify the correct behavior of a particular feature or function. A test group can have one or more other test groups as prerequisites. Use this procedure to view or edit the name and prerequisites of an existing test group. This procedure is not applicable to the application "HTML Platform."

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Configuration** tab**,** choose an application from the drop-down list, choose **Groups**, then click the name of a group in the table

Steps

1. If you want to rename the group, then type into the Group Name field.
2. If you want to remove a prerequisite, then select the appropriate check box in the Remove column.
3. If you want to add a prerequisite, then choose from the drop-down lists in the Group Name column.
4. If you want to view the individual tests that belong to that test group, then click **View Tests**.

   This opens the page where you manage how tests are organized into test groups.
5. Optionally, click **Restore** to reset the fields to their original settings.
6. Click **Update** to save.

2.70 Managing Tests

The Tests Administration page is the starting point for viewing, creating, updating, prioritizing, and removing individual tests. Tests verify the correct behavior of a particular feature or function. Use this procedure to manage tests. This procedure is not applicable to the application "HTML Platform."

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Configuration** tab**,** choose an application from the drop-down list, then choose **Tests**

Steps

1. Choose a group from the Group drop-down list.
2. View test names and class names display in the table.
3. If you want to create a test, then click **Create**.

   This opens the page where you specify the details of a new test.
4. If you want to change the test sequence, then choose the appropriate numbers from the drop-down lists in the Sequence column.
5. If you want to remove a test, then select the check box in the Remove column.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

2.71 Registering Tests

Tests verify the correct behavior of a particular feature or function. Use this procedure to register a test.

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Configuration** tab**,** choose an application from the drop-down list, choose **Tests**, then click **Create**

Steps

1. Type the fully qualified name of the Java class into the Test Class Name field.
2. View the class names of any existing tests in the Existing Tests field.
3. Choose a sequence number from the Sequence drop-down list.
4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Create** to save.

2.72 Setting Default Test Input Values

Tests verify the correct behavior of a particular feature or function. Use this procedure to set the default input values for a test. This procedure is not applicable to the application "HTML Platform."

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to the **Configuration** tab**,** choose an application from the drop-down list, then choose **Inputs**

Steps

1. Click the name of a test.
2. Type default input values into the appropriate fields.
3. Click **Update** to save.
4. Optionally, type an additional set of default values and click **Update**.
5. Repeat step 4 as desired.
6. Optionally, click **Restore** to reset the fields to their original values.
7. If you want to delete an input value, then select the check box in the Remove column and click **Update**.

2.73 Managing Applications

Applications must be registered to be included in CRM Diagnostics. Applications can have other applications as prerequisites.

You can perform the following tasks to manage applications:

Registering Applications

Editing Application Prerequisites

For information on Diagnostics framework concepts, see Understanding Diagnostics

2.74 Registering Applications

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to **Configuration > Applications**, then click **Create**

Steps

1. Choose an application from the Choose an Application drop-down list.
2. If you want to set Application Prerequisites, then choose from the drop-down lists in the Application Name column.
3. Optionally, click **Restore** to clear the Application Prerequisites fields.
4. Click **Register** to register the application.
5. View the new application display in the Application drop-down list at the top of the page.

2.75 Editing Application Prerequisites

Applications can have other applications as prerequisites. Use this procedure to edit application prerequisites.

Prerequisites for This Procedure

- Read Understanding Diagnostics
- Navigate to **Configuration > Applications**

Steps

1. Choose an application from the Application drop-down list.
2. If you want to remove an Application Prerequisite, then select the appropriate check box in the Remove column.
3. If you want to add an Application Prerequisite, then choose from the drop-down lists in the Application Name column.
4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Update** to save.

6. If you want to register an application to include it in CRM Diagnostics, then click **Create**.

   This opens the page where you register a new application and its prerequisites.

2.76 Using Cache

You can perform the following tasks from the Cache subtab:

- Managing Cache Policies
  - Editing Cache Policy Details
- Managing Cache Filters
  - Viewing Cache Filter Details
  - Creating and Editing Cache Filters
- Managing Component Cache
  - Editing Component Cache Details
- Viewing Cache Statistics

For information on Cache concepts, see Understanding Cache.

2.77 Managing Cache Policies

The Cache Policies table lists the Cache Policy of each application on each host. Use this procedure to manage Cache Policies.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance > Cache > Applications > Policies**

Steps

1. Choose a host name or **All Hosts** from the drop-down list labeled View to choose which Cache Policies display in the table.
2. If you want to sort the table alphabetically by host name or application, then click the appropriate link in the top row of the table.
3. If you want to edit the details of a Cache Policy, then click a policy name in the table.

This opens the page where you edit the details of a Cache Policy.

4. If you want to modify a row in the table, then select the check box in the Select column.
5. If you want to set a Cache Policy, then choose **Cache Only**, **Cache and Priming**, **Disabled**, or **Custom** from the drop-down lists in the Policy column.

   If you enable caching, then all components of the application use the caching. If you enable priming, then the components read some initial cache data when the Jserv process begins. Priming can improve the performance for the first set of users because the data that they need is already available in the cache. However, priming can increase the size of the Java Virtual Machine. Disable the cache if the size of the Java Virtual Machine grows too large.
6. If you want to set filters, then choose **Enabled, Disabled** or **Custom** from the drop-down lists in the Filters column.
7. If you want to clear a cache, then click **Clear Cache**.
8. If you want to reload a cache, then click **Reload Cache**.
9. Optionally, click **Restore** to reset the fields to their original settings.
10. Click **Update** to save.

2.78 Editing Cache Policy Details

The Cache Policy Detail page displays the cache policy types for components of applications running on a particular host. It also displays cache filters. Use this procedure to edit the details of cache policies and cache filters.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance > Cache > Applications > Policies**, then click the name of a policy in the table

Steps

1. Edit the Component Cache Policy section:
   a. If you want to modify a policy, then select the check box in the appropriate row in the table.

b. If you want to modify a cache policy, then choose **Cache Only**, **Cache and Priming**, or **Disabled** from the drop-down list in the Policy column of the table.

c. If you want to reload a cache, then choose it by selecting the appropriate check box and then click **Reload Cache**.

d. If you want to clear a cache, then choose it by selecting the appropriate check box and then click **Clear Cache**.

e. Optionally, click **Restore** to reset the fields to their original settings.

f. Click **Update** to save.

2. Edit the Cache Filters section:

   a. Select or deselect check boxes in the Enabled column as desired.

   b. Optionally, click **Restore** to reset the fields to their original settings.

   c. Click **Update** to save.

2.79 Managing Cache Filters

The main page for cache filters is the starting point for viewing, creating, updating and removing cache filters. Cache filters are application-specific components that indicate the responsibility IDs and language codes for priming. Use this procedure to manage cache filters.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance** > **Cache** > **Applications** > **Filters**

Steps

1. Choose an application name from the drop-down list labeled View to choose which Cache Filters display in the table.
2. Optionally, click **First**, **Previous**, **Next**, **Last**, or an option from the drop-down list to navigate within the table.
3. If you want to create a new Cache Filter, then click **Create**.

   This opens the page where you begin editing the details of a new Cache Filter.
4. If you want to view the details of a Cache Filter, then click a filter name in the table.

This opens the page where you view the details of a Cache Filter.

5. If you want to remove a filter, then:

   a. Select the appropriate check box in the Remove column.

   b. Optionally, click **Restore** to reset the fields to their original settings.

   c. Click **Update**.

   This removes the filter from the table.

2.80 Viewing Cache Filter Details

Use this procedure to view the details of a Cache Filter.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance > Cache >Applications > Filters**, then click a filter name in the table.

Steps

1. View the information displayed on the page.
2. If you want to edit the details of the Cache Filter, then click **Edit**.

   This opens the page where you edit the details of an existing Cache Filter.

2.81 Creating and Editing Cache Filters

When you create a new Cache Filter or modify an existing Cache Filter, you complete three different screens. The following procedures guide you through each screen:

Step 1: Editing Basic Information

Step 2: Choosing Responsibilities

Step 3: Choosing Languages

After you finish creating or editing a Cache Filter, you return to the main Cache Filters page.

For information on related concepts, see Understanding Cache.

2.82 Step 1: Editing Basic Information

Use this procedure to enter basic information about a Cache Filter.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance > Cache >Applications > Filters**. If you are creating a new filter, then click **Create**. If you are modifying an existing filter, then click a policy name in the table and click **Edit** after the new page displays.

Steps

1. Type a filter name into the Filter Name field.
2. Type a description into the Description field.
3. Choose an application from the Application drop-down list.
4. Optionally, if you are creating a new Cache Filter and want to clear the fields, then click **Clear**.
5. Optionally, if you are editing an existing Cache Filter and want to reset the fields to their original settings, then click **Restore**.
6. Click **Continue** to save and move on to the next screen.

2.83 Step 2: Choosing Responsibilities

Use this procedure to choose which responsibilities apply to a particular Cache Filter.

Prerequisites

- Read Understanding Cache

Steps

1. Select the name of a responsibility in one list and click **>** or **<** to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all Available Responsibilities to the Configured Responsibilities list, then click **>>**.

4. If you want to move all Configured Responsibilities to the Available Responsibilities list, then click **<<**.
5. Optionally, if you are creating a new Cache Filter and want to clear the fields, then click **Clear**.
6. Optionally, if you are updating an existing Cache Filter and want to reset the fields to their original settings, then click **Restore**.
7. Click **Continue** to save and move on to the next page.

2.84 Step 3: Choosing Languages

Use this procedure to choose which languages apply to a particular Cache Filter.

Prerequisites

- Read Understanding Cache

Steps

1. Select a language in one list and click **>** or **<** to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all Available Languages to the Configured Languages list, then click **>>**.
4. If you want to move all Configured Languages to the Available Languages list, then click **<<**.
5. Optionally, if you are creating a new Cache Filter and want to clear the fields, then click **Clear**.
6. Optionally, if you are updating an existing Cache Filter and want to reset the fields to their original settings, then click **Restore**.
7. If you are creating a new Cache Filter, then click **Create** to save.
8. If you are updating an existing Cache Filter, then click **Update** to save.

2.85 Managing Component Caches

The main page for component caches is the starting point for viewing, creating, updating, and removing component caches. Each application uses one or more component caches. Use this procedure to manage component caches.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance > Cache > Components**
- Modify the corresponding code before modifying a component cache

Steps

1. Choose an application from the drop-down list labeled View to choose which component caches display.
2. If you want to create a component cache, then click **Create**.

   This opens the page where you edit the details of a new component cache.
3. If you want to update a component cache, then click its name.

   This opens the page where you edit the details of an existing component cache.
4. If you want to remove a component cache, then select the check box in the Remove column.
5. Optionally, click **Restore** to reset the fields to their original settings.
6. Click **Update** to save.

2.86 Editing Component Cache Details

Use this procedure to edit the details of new or existing component caches.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance > Cache > Components**, then either click **Create** or click the name of a component cache in the table
- Modify the corresponding code before modifying a component cache

Steps

1. If you are creating a new component cache, then choose an application from the Application drop-down list.

   If you are updating an existing component cache, then you cannot edit this field.

2. If you are creating a new component cache, then type a component identifier into the Component Identifier field.

   The component identifier should start with the appropriate application shortcode.

   If you are updating an existing component cache, then you cannot edit this field.

3. Type a component name into the Component Name field.

4. Type a description into the Description field.

5. Type into a loader class name into the Loader Class Name field.

   Each component cache has an associated loader class that is used by the caching framework to load the corresponding object into the cache, if it is not already in the cache.

6. Choose **Time to Live** or **Idle Time** from the drop-down list.

   The Time to Live is the maximum length of time for a cache to be considered valid. The Idle Time is the maximum length of time for an object to go unused before it is flushed from the cache.

   a. Type a number of seconds, minutes, or hours into the text input field to edit the Time to Live or Idle Time.

   b. Choose **seconds**, **minutes**, or **hours** from the drop-down list.

7. If you are creating a new component cache, then select or deselect the check box labeled Enable Security Group ID.

   The Security Group ID is used in the hosting environments.

   If you are updating an existing component cache, then you cannot edit this field.

8. Select or deselect the check box labeled Enable Statistics Collection.

   Enabling statistics collection can slow the cache down. Use it if there are problems with using the cache or if you need to check the cache efficiency.

9. Select or deselect the check box labeled Distributed Mode.

   Distributed Mode means that object updates are propagated across computers and across Java VMs.

10. Select or deselect the check box labeled HTML Platform Component.

HTML Platform Components are generic caches that are common to all applications. Usually, you only select this check box for JTF component caches. It is merely a logical grouping that does not change the assigned application.

11. Optionally, if you are creating a new component cache and want to clear the fields, then click **Clear**.
12. Optionally, if you are updating an existing component cache and want to reset the fields to their original settings, then click **Restore**.
13. If you are creating a new component cache, then click **Create** to save.
14. If you are updating an existing component cache, then click **Update** to save.

2.87 Viewing Cache Statistics

Use this procedure to view statistics about caches.

Prerequisites

- Read Understanding Cache
- Navigate to **Performance > Cache > Statistics**

Steps

1. Choose from the drop-down lists next labeled View to select which hosts and applications have data about them displayed below.
2. View the data.

   You can use these statistics to configure the component caches based on how each component cache is performing. You can interpret the data to decide how effective the component caches are and whether or not they should be disabled. For example, if the cache has a high hit ratio, then the cache is useful and should not be disabled.

2.88 Using XML Services

In the XML Services subtab, you manage inter-application Web service sharing. You can perform the following tasks from the XML Services subtab:

- Managing Service Groups
  - Editing the General Settings of New Service Groups
  - Editing the Services of New Service Groups

- Editing the Type Mappings of New Service Groups
- Updating the General Settings of Service Groups
- Updating the Services of Service Groups
- Updating the Type Mappings of Service Groups

- Managing Invocations
  - Creating Invocations
  - Updating Invocations
- Managing Authentication Profiles
  - Creating Authentication Profiles
  - Updating Authentication Profiles
- Managing Events
  - Creating Events
  - Updating Events

For information on XML Services concepts, see Understanding XML Services.

2.89 Managing Service Groups

The main page for Service Groups is the starting point for viewing, creating, updating, and removing service groups. A Service Group is the logical name for a Java class that contains functions for loading services into a system. Services are function calls with defined inputs and outputs that are implemented as methods of the Java class. Use this procedure to manage service groups.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Services**

Steps

1. If you want to modify the service group prefix, then:

   a. Type into the Service Group Prefix field at the top of the page.

The service group prefix is the first part of a service group full name. The format of service group full names is the following: *<service group prefix>.<application shortname>.<service group name>*

b. Optionally, click **Restore** to reset the field to its original setting.

c. Click **Update** to save.

2. If you want to create a new service group, then click **Create**.

   This opens the page where you start to edit the details of a new service group.

3. If you want to view the service groups of a particular application, then choose an application name from the drop-down list at the top of the table. Optionally, choose **ALL** to view all service groups.

   The page refreshes to display the choice that you made.

4. Optionally, click **First**, **Previous**, **Next**, **Last,** or an option from the drop-down list to navigate within the table.

5. If you want to update a service group, then click its name in the table.

   This opens the page where you start to edit the details of an existing service group.

6. If you want to remove a service group, then:

   a. Select the corresponding check box in the Remove column of the table.

   b. Optionally, click **Restore** to reset the fields to their original settings.

   c. Click **Update** to save.

2.90 Editing the General Settings of New Service Groups

A Service Group is the logical name for a Java class that contains methods that are exposed as services. Services are function calls with defined inputs and outputs that are implemented as methods of the Java class. Creating a new service group requires completing three screens. Use this procedure to complete the first screen.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Services,** then click **Create**
- Have the Java Class name of the service group ready.

Steps

1. Choose an application from the drop-down list.
2. Type the Service Group name into the Service Group field.

   If you type "TestService" as your service group name while your prefix is "oracle.apps" and your application short name is "JTF," then the service group's full name is oracle.apps.JTF.TestService
3. Type the Java Class name into the Java Class field.

   For example, "samples.test.TestServiceGroup"
4. Optionally, type a description into the Description field.
5. Optionally, click **Clear** to clear the fields.
6. Click **Continue**.

   The page automatically navigates to the second step of the procedure, Editing Services.

2.91 Editing the Services of New Service Groups

A Service Group is the logical name for a Java class that contains methods that are exposed as services. Services are function calls with defined inputs and outputs that are implemented as methods of the Java class. Creating a new service group requires completing three screens. Use this procedure to complete the second screen.

Prerequisites

- Read Understanding XML Services

Steps

1. View a table that lists the services defined in the class that you set up on the previous screen.
2. Select check boxes in the Enable column to enable services, or click **Enable All** to enable all services.
3. Optionally, type descriptions into the Description column.
4. Optionally, click **Clear** to clear the fields.
5. Optionally, click **Back** to go back to the previous screen without saving changes.

6. Click **Continue**.

   The page automatically navigates to the third and final step of the procedure, Editing Type Mappings.

2.92 Editing the Type Mappings of New Service Groups

A Service Group is the logical name for a Java class that contains methods that are exposed as services. Services are function calls with defined inputs and outputs that are implemented as methods of the Java class. Creating a new service group requires completing three screens. Use this procedure to complete the third screen.

Prerequisites

- Read Understanding XML Services

Steps

1. If you want to use your own settings, then type them into the Data Type, Encoding, Namespace, Serializer, and Deserializer columns.
2. If you want to use default settings, then select the check box in the Use Default column.
3. Optionally, click **Clear** to clear the fields.
4. Optionally, click **Back** to go back to the previous screen without saving changes.
5. Click **Create** to save the new service group.

2.93 Updating the General Settings of Service Groups

A Service Group is the logical name for a Java class that contains methods that are exposed as services. Services are function calls with defined inputs and outputs that are implemented as methods of the Java class. Updating an existing service group requires completing three screens. Use this procedure to complete the first screen.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Services,** then click a service group name in the table

Steps

1. Optionally, type into the Description field to edit the service group description.
2. Optionally, click **Clear** to clear the field.
3. Click **Continue**.

   The page automatically navigates to the second step of the procedure, Editing Services.

2.94 Updating the Services of Service Groups

A Service Group is the logical name for a Java class that contains methods that are exposed as services. Services are function calls with defined inputs and outputs that are implemented as methods of the Java class. Updating an existing service group requires completing three screens. Use this procedure to complete the second screen.

Prerequisites

- Read Understanding XML Services

Steps

1. Edit the Previously Existing Services section:
   a. Select or deselect the check boxes in the Enable column as desired.
   b. Optionally, click **Disable All** to disable all previously existing services.
   c. Optionally, type descriptions into the Description fields.
2. Edit the Added Services section:

   If there are no added services for this service group, the fields will be empty.
   a. Select or deselect the check boxes in the Enable column as desired.
   b. Optionally, click **Disable All** to disable all added services.
   c. Optionally, type descriptions into the Description fields.
3. Optionally, click **Restore** to reset the fields to their original settings.
4. Optionally, click **Back** to go back to the previous screen without saving changes.
5. Click **Continue**.

The page automatically navigates to the third and final step of the procedure, Editing Type Mappings.

2.95 Updating the Type Mappings of Service Groups

A Service Group is the logical name for a Java class that contains methods that are exposed as services. Services are function calls with defined inputs and outputs that are implemented as methods of the Java class. Updating an existing service group requires completing three screens. Use this procedure to complete the third screen

Prerequisites

- Read Understanding XML Services

Steps

1. If you want to use your own settings, then type them into the Data Type, Encoding, Namespace, Serializer, and Deserializer columns.
2. If you want to use default settings, then select the check box in the Use Default column.
3. If you want to remove a type mapping, then select the appropriate check box in the Remove column of the table.
4. Optionally, click **Restore** to reset the fields to their original settings.
5. Optionally, click **Back** to go back to the previous screen without saving changes.
6. Click **Update** to save.

2.96 Managing Invocations

The main page for invocations is the starting point for viewing, creating, updating, and removing invocations. An invocation is the logical name for a record that contains all information about a service on a remote machine. Use this procedure to manage invocations.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Invocations**

Steps

1. If you want to create a new invocation, then click **Create**.

   This opens the page where you edit the details of a new invocation.

2. If you want to view the invocations of a particular application, then choose an application name from the drop-down list at the top of the table. Optionally, choose **ALL** to view all invocations.

3. Optionally, click **First**, **Previous**, **Next**, **Last,** or an option from the drop-down list to navigate within the table.

4. If you want to update the details of a particular invocation, then click its name in the table.

   This opens the page where you edit the details of an existing invocation.

5. If you want to remove an invocation, then:

   a. Select the corresponding check box in the Remove column of the table.

   b. Click **Update** to save.

2.97 Creating Invocations

An invocation is the logical name for a record that contains all information about a service on a remote machine. Use this procedure to create invocations.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Invocations**, then click **Create**
- Confirm that the following are true:
  – Service group is created
  – Service in service croup is enabled
  – Authentication is created

Steps

1. Complete the General Settings section.

   a. Choose an application from the drop-down list.

   b. Type an invocation name into the Invocation Name field.

c. Optionally, type a description into the Description field.

d. Type the full name of the service group into the Service Group Full Name field.

   For example, "oracle.apps.JTF.TestService"

e. Type the name of the service into the Service field.

   This is a Java method.

f. Type a number into the Timeout field.

   This is the number of milliseconds to wait before a response. A timeout of zero means it will wait forever.

2. Complete the Authentication Profile section.

   a. Choose a URL from the URL drop-down list.

   b. Choose a User from the User drop-down list. If you are not setting a user, then choose **No_Authentication**.

      You can change the list of available users by editing the authentication profile.

3. Complete the Target Service Signature section.

   This is the format of the method that you are calling.

   a. Type a data type into the Return Data Type field.

      If the data type is a string, then you must type **java.lang.string**

   b. If you want to set your own return data type encoding, then type it into the Encoding field.

   c. If you want to use the default return data type encoding, then select the Use Default check box.

   d. Type a parameter name into the Parameter Name column.

   e. Type a data type into the Data Type column.

      Instead of using primitive object types like java.lang.Integer, enter the actual primitive, such as "int" or "float."

   f. If you want to use the default encoding, then select the Use Default check box.

   g. If you want to set your own encoding, then type it into the Encoding field.

4. Complete the Type Mappings section.

   This section is for user defined types.

   a. Type the name of a fully qualified Java class into the Data Type column.

   b. If you want to set your own parameters, then type them into the Encoding, Name Space, Serializer and Deserializer columns.

   c. If you want to use defaults (recommended), then select the Use Default check box.

5. Optionally, click **Clear** to clear the fields.

6. Click **Create** to save.

2.98 Updating Invocations

An invocation is the logical name for a a record that contains all information about a service on a remote machine. Use this procedure to modify the details of existing invocations.

Prerequisites

- Read Understanding XML Services

- Navigate to **Integration** > **XML Services** > **Invocations**, then click an invocation name in the table

Steps

1. Edit the General Settings section.

   a. Optionally, type a description into the Description field.

   b. Type the full name of the service group into the Service Group Full Name field.

      For example, "oracle.apps.JTF.TestService"

   c. Type the name of the service into the Service field.

      This is a Java method.

   d. Type a number into the Timeout field.

      This is the number of milliseconds to wait before a response. A timeout of zero means it will wait forever.

2. Complete the Authentication Profile section.
   a. Choose a URL from the URL drop-down list.
   b. Choose a User from the User drop-down list. If you are not setting a user, then choose **No_Authentication**.

      You can change the list of available users by editing the authentication profile.
3. Complete the Target Service Signature section.

   This is the format of the method that you are calling.
   a. Type a data type into the Return Data Type field.

      If the data type is a string, then you must type **java.lang.string**
   b. If you want to set your own return data type encoding, then type it into the Encoding field.
   c. If you want to use the default return data type encoding, then select the Use Default check box.
   d. Type a parameter name into the Parameter Name column.
   e. Type a data type into the Data Type column.

      Instead of using primitive object types like java.lang.Integer, enter the actual primitive, such as "int" or "float."
   f. If you want to set your own encoding, then type it into the Encoding field.
   g. If you want to use the default encoding, then select the Use Default check box.
   h. If you want to delete an entry in the table, then select the appropriate Remove check box.
4. Complete the Type Mappings section.

   This section is for user defined types.
   a. Type the name of a fully qualified Java class into the Data Type column.
   b. If you want to set your own parameters, then type them into the Encoding, Name Space, Serializer and Deserializer columns.
   c. If you want to use defaults (recommended), then select the Use Default check box.

d. If you want to delete an entry in the table, then select the appropriate Remove check box.

5. Optionally, click **Restore** to reset the fields to their original settings.

6. Click **Update** to save.

2.99 Managing Authentication Profiles

The main page for authentication profiles is the starting point for viewing, creating, updating, and removing authentication profiles. Authentication profiles tell an invocation what machine, user name and password to use. Use this procedure to manage authentication profiles.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Authentications**

Steps

1. If you want to create a new authentication profile, then click **Create**.

   This opens the page where you edit the details of a new authentication profile.

2. If you want to update an authentication profile, then click its name in the table.

   This opens the page where you edit the details of an existing authentication profile.

3. Optionally, click **First**, **Previous**, **Next**, and **Last** to navigate within the table.

4. If you want to remove an authentication profile, then:

   a. Select the corresponding check box in the Remove column of the table.

   b. Click **Update** to save.

2.100 Creating Authentication Profiles

Authentications tell an invocation what machine, user name and password to use. Use this procedure to create authentications.

Prerequisites

- Read Understanding XML Services

- Navigate to **Integration > XML Services > Authentications,** then click **Create**
- Have the URL of the SOAP server of the target machine ready

Steps

1. Type the URL of the SOAP server of the target machine into the URL field.
2. If you want to enter a username and password combination, then:
   a. Type a username into the Username column.
   b. Type a password into the Password column.
   c. Retype the password into the Retype Password column.
3. Repeat step 2 as desired.
4. Optionally, click **Clear** to clear the fields.
5. Click **Create** to save.

2.101 Updating Authentication Profiles

Authentications tell an invocation what machine, user name and password to use. Use this procedure to view or modify the details of an authentication.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Authentications,** then click a URL in the table

Steps

1. If you want to modify the URL of the target machine, then:
   a. Type the URL of the SOAP server of the target machine into the URL field.
   b. Optionally, click **Restore** to reset the field to its original setting.
   c. Click **Update** to save.
2. If you want to reset a password, then:
   a. Type a password into the Password column.
   b. Retype the password into the Retype Password column.
3. If you want to add a username and password combination, then:

a. Type a username into the Username column.

b. Type a password into the Password column.

c. Retype the password into the Retype Password column.

4. If you want to remove a username and password combination, then select the appropriate check box in the Remove column.

5. Click **Update** to save.

2.102 Managing Events

The main page for events is the starting point for viewing, creating, updating, and removing events. An event outputs an object of a pre-defined type to a set of subscribers. Subscribers are invocations that share an input type. Use this procedure to manage events.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Events**

Steps

1. If you want to create a new event, then click **Create**.

   This opens the page where you edit the details of a new event.

2. If you want to view the events of a particular application, then choose an application name from the drop-down list. Optionally, choose **ALL** to view all events.

3. Optionally, click **First**, **Previous**, **Next**, **Last,** or an option from the drop-down list to navigate within the table.

4. If you want to update details of an event, then click its name in the table.

   This opens the page where you edit the details of an existing event.

5. If you want to remove an event, then:

   a. Select the corresponding check box in the Remove column of the table.

   b. Click **Update** to save.

2.103 Creating Events

An event outputs an object of a pre-defined type to a set of subscribers. Subscribers are invocations that share an input type. Creating an event requires you to complete two screens, both of which are described below. Use this procedure to create events.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration** > **XML Services** > **Events**, then click **Create**
- Confirm that the relevant invocations are created

Steps

1. Edit the General Settings page:
   a. Choose an application from the drop-down list.
   b. Type an event name into the Event Name field.
   c. Type the relevant object type into the Object Type field.
   d. Optionally, type a description into the Description field.
   e. Optionally, click **Clear** to clear the fields.
   f. Click **Continue** to move on to the next page, where you set up event subscribers.
2. Edit the Event Subscribers page:
   a. Choose the name of a subscriber in one list and click **>** or **<** to move it to the other list.
   b. Repeat step a as desired.
   c. If you want to move all Available Subscribers to the Assigned Subscribers list, then click **>>**.
   d. If you want to move all Assigned Subscribers to the Available Subscribers list, then click **<<**.
   e. Optionally, click the up and down arrows to change the sequence of subscribers.
   f. Optionally, click **Back** to go back to the previous page without saving changes.
   g. Click **Create** to save.

2.104 Updating Events

An event outputs an object of a predefined type to a set of subscribers. Subscribers are invocations that share an input type. Use this procedure to view or modify the details of existing events.

Prerequisites

- Read Understanding XML Services
- Navigate to **Integration > XML Services > Events**, then click an event name in the table

Steps

1. Optionally, type a description into the Description field.
2. Set event subscribers.
   a. Choose the name of a subscriber in one list and click **>** or **<** to move it to the other list.
   b. Repeat step a as desired.
   c. If you want to move all Available Subscribers to the Assigned Subscribers list, then click **>>**.
   d. If you want to move all Assigned Subscribers to the Available Subscribers list, then click **<<**.
   e. Optionally, click the up and down arrows to change the sequence of subscribers.
3. Optionally, click **Restore** to reset the fields to their original settings.

Click **Update** to save.

2.105 Using Declarative Page Flows

The Introduction page for Declarative Flows is the starting point for using Declarative Flows. You can use Declarative Flows to set up and manage the flow of pages within an application. A key benefit of Declarative Flows is that the procedures for linking pages to each other do not require changing the code of JavaServer Pages. The key concepts of Declarative Flows are Rules, Physical Pages, Logical Pages and Business Flows.

You can perform the following tasks from the Declarative Page Flows subtab:

- Managing Physical Pages
  - Editing Physical Page Details
- Managing Logical Pages
  - Editing Logical Page Details
- Managing Rules
  - Editing Rule Details
- Managing Business Flows
  - Editing Business Flow Details
  - Mapping Flows
  - Cloning Flows
  - Viewing Flow Families

For information on Declarative Page Flows concepts, see Understanding Declarative Page Flows.

2.106 Managing Physical Pages

The main page for Physical Pages is the starting point for viewing, registering, and updating Physical Pages. Physical Pages are JavaServer Pages (JSPs). Use this procedure to manage Physical Pages.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Physical Pages**

Steps

1. If you want to change which Physical Pages display in the table, then:

   a. If you want Physical Pages from all applications to display in the table, then choose **All** from the drop-down list at the top of the table.

   b. If you want to filter the table by application, then choose a module prefix from the drop-down list at the top of the table.

   c. If you want to search the table of Physical Pages, then type the name of a Physical Page or part of the name of a Physical Page into the text input field.

Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Physical Pages whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Physical Pages whose names end with "sales." The search phrase "sales" returns the Physical Page named "sales."

d. Click **Go**.

   The results display in the table.

2. If you want to register a Physical Page, then click **Create**.

   This opens the page where you edit the details of a new Physical Page.

3. If you want to update an existing Physical Page, then click its name in the table.

   This opens the page where you edit the details of an existing Physical Page.

2.107 Editing Physical Page Details

On the details page for Physical Pages, you complete the procedures of either registering or updating Physical Pages. Use this procedure to edit the details of new or existing Physical Pages.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Physical Pages**, then either click **Create** to register a new page or click the name of a JSP to modify its details

Steps

1. Type into the Name field to edit the name of the Physical Page.
2. Type into the Description field to edit the description of the Physical Page.

   This field is optional.

3. If you are registering a new Physical Page, then choose an application from the Application drop-down list.

   If you are updating an existing Physical Page, then you cannot edit this field. It is permanently set when you create the Physical Page.

4. Optionally, if you are registering a new Physical Page and want to clear the fields, then click **Clear**.

5. Optionally, if you are updating an existing Physical Page and want to reset the fields to their original settings, then click **Restore**.
6. If you are registering a new Physical Page, then click **Create** to save.
7. If you are updating an existing Physical Page, then click **Update** to save.

2.108 Managing Logical Pages

The main page for Logical Pages is the starting point for viewing, creating, and updating Logical Pages. Logical Pages can be utilized either stand-alone or to represent nodes in a Business Flow. One or more Physical Pages map to each Logical Page. Use this procedure to manage Logical Pages.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Logical Pages**

Steps

1. If you want to change which Logical Pages display in the table, then:
   a. If you want to allow Physical Pages from all applications to display in the table, then choose **All** from the drop-down list at the top of the table.
   b. If you want to filter the table by application, then choose a module prefix from the drop-down list at the top of the table.
   c. If you want to search the table of Physical Pages, then type the name of a Physical Page or part of the name of a Physical Page into the text input field.

      Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Physical Pages whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Physical Pages whose names end with "sales." The search phrase "sales" returns the Physical Page named "sales."
   d. Click **Go**.

      The results display in the table.
2. If you want to alphabetize the table by Logical Page name, then click **Logical Names**.
3. If you want to alphabetize the table by description, then click **Description**.

4. If you want to create a Logical Page, then click **Create**.

   This opens the page where you edit the details of a new Logical Page.

5. If you want to update an existing Logical Page, then click its name in the table.

   This opens the page where you edit the details of an existing Logical Page.

2.109 Editing Logical Page Details

On the details page for Logical Pages, you complete the procedures of either creating or updating Logical Pages. Use this procedure to edit the details of new or existing Logical Pages.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Logical Pages**, then either click **Create** or click a page name in the table

Steps

1. Type into the Name field to edit the name of the Logical Page.
2. Type into the Description field to edit the description of the Logical Page.

   This field is optional.

3. If you are creating a new Logical Page, then choose an application from the Application drop-down list.

   If you are updating an existing Logical Page, then you cannot edit this field. It is permanently set when you create the Rule.

4. Type into the Page Controller field to edit the name of the Page Controller.

   This is the fully qualified name of a Java class. The class implements the Logical Page Controller interface and provides values to evaluate Rules.

5. Type into the Default Physical Page field to edit the name of the Physical Page that displays when none of the Rules evaluate to true. Optionally, click **Go** to choose from a list of values.
6. Edit the Page Display Rules table.

   One row in the table represents one Rule.

a. Type into the Sequence column to edit the order in which the Rules are evaluated.

b. Type into the Rule Name column to edit the name of the Rule. Optionally, click **Go** to choose from a list of values.

c. Type into the Description column to edit the description of the Rule.

d. Type into the Physical column to edit the name of the Physical Page that is associated with the Rule. Optionally, click **Go** to choose from a list of values.

7. Repeat step 6 as desired.
8. Optionally, click **Add Rows** to add empty rows to the table.
9. Optionally, if you are creating a new Logical Page and want to clear the fields, then click **Clear**.
10. Optionally, if you are updating an existing Logical Page and want to reset the fields to their original settings, then click **Restore**.
11. If you are creating a new Logical Page, then click **Create** to save.
12. If you are updating an existing Logical Page, then click **Update** to save.

2.110 Managing Rules

The main page for Rules is the starting point for viewing, creating, and updating Rules. In the context of a Logical Page, Rules determine either what Physical Page needs to be rendered or what Logical Page displays next. Use this procedure to manage Rules.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Rules**

Steps

1. If you want to change which Rules display in the table, then:

   a. If you want Rules from all applications to display in the table, then choose **All** from the drop-down list at the top of the table.

   b. If you want to filter the table by application, then choose a module prefix from the drop-down list at the top of the table.

c. If you want to search the table of Rules, then type the name of a Rule or part of the name of a Rule into the text input field.

   Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Rules whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Rules whose names end with "sales." The search phrase "sales" returns the Rule named "sales."

d. Click **Go**.

   The results display in the table.

2. If you want to create a Physical Page, then click **Create**.

   This opens the page where you edit the details of a new Rule.

3. If you want to update an existing Rule, then click its name in the table.

   This opens the page where you edit the details of an existing Rule.

2.111 Editing Rule Details

On the details page for Rules, you complete the procedures of either creating or updating Rules. Use this procedure to edit the details of new or existing Rules.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Rules**, then either click **Create** or click a Rule name in the table

Steps

1. Type into the Name field to edit the name of the Rule.
2. Type into the Description field to edit the description of the Rule.

   This field is optional.

3. If you are creating a new Rule, then choose an application from the Application drop-down list.

   If you are updating an existing Rule, then you cannot edit this field. It is permanently set when you create the Rule.

4. Edit the Rule Conditions table.

One row in the table represents one Rule Condition.

a. Type a parameter into the Parameter column.

b. Choose an operator from the drop-down list in the Condition column.

c. Type a value into the Value column.

5. Repeat step 4 as desired.
6. Optionally, click **Add Rows** to add empty rows to the table.
7. Optionally, if you are creating a new Rule and want to clear the fields, then click **Clear**.
8. Optionally, if you are updating an existing Rule and want to reset the fields to their original settings, then click **Restore**.
9. If you are creating a new Rule, then click **Create** to save.
10. If you are updating an existing Rule, then click **Update** to save.

2.112 Managing Business Flows

The main page for Business Flows is the starting point for viewing, creating, updating, previewing, and cloning Business Flows. Business Flows are page display sequences that address specific business processes. For example, you can create a Business Flow for the process of purchasing an item from an online store, or you can create a Business Flow for the process of resolving a user's service request. Business Flows can be either linear or branched in structure. Use this procedure to manage Business Flows.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Business Flows**

Steps

1. If you want to change which Business Flows display in the table, then:

   a. If you want Business Flows from all applications to display in the table, then choose **All** from the drop-down list at the top of the table.

   b. If you want to filter the table by application, then choose a module prefix from the drop-down list at the top of the table.

c. If you want to search the table of Business Flows, then type the name of a Business Flow or part of the name of a Business Flow into the text input field.

   Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Business Flows whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Business Flows whose names end with "sales." The search phrase "sales" returns the Business Flow named "sales."

d. Click **Go**.

   The results display in the table.

2. If you want to update an existing Business Flow, then click its name in the table.

   This opens the page where you edit the details of an existing Business Flow.

3. If you want to preview an existing Business Flow, then click the icon in the Preview column.

   This opens the page where you preview a Business Flow.

4. If you want to view the Flow Family of a flow, then click the icon in the Flow Family column.

   This opens the page where you view a flow's Flow Family.

5. If you want to create a Business Flow, then click **Create Flow**.

   This opens the page where you edit the details of a new Business Flow.

6. If you want to create a duplicate of a flow, then click **Clone Flow.**

   This opens the page where you clone a flow.

2.113 Editing Business Flow Details

On the details page for Business Flows, you can edit the basic settings of new or existing Business Flows. After using this page, you can open the Map Flows page to define the conditional branches in the Business Flow. Use one of the following procedures:

Creating a New Business Flow

Updating an Existing Business Flow

For information on Declarative Page Flows concepts, see Understanding Declarative Page Flows.

2.114 Creating a New Business Flow

Use this procedure to edit the basic settings of a new business flow.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Business Flows**, then click **Create**

Steps

1. Type a flow name into the Name field.
2. Choose an application from the Application drop-down list.
3. Optionally, type a description into the Description field.
4. Optionally, select the Secure check box if the flow is to use HTTPS.
5. Type the name of the Finalization Class into the Finalization Class field.

   This is the name of a Java class. The class implements the FlowFinalizer interface and executes at the end of the Business Flow.
6. Type the name of the Logical Page that should be invoked after the completion of the flow into the Return to Logical field. Optionally, click **Go** to choose from a list of values.
7. Type the name of the first Logical Page in the flow into the Root Logical field. Optionally, click **Go** to choose from a list of values.
8. Optionally, edit the Default Flow Sequence table:

   If the flow you are creating is linear, then complete this table. If the flow you are creating has conditional branches, then proceed to step 9.

   a. Type numbers into the Sequence fields to indicate the page order within the flow.

   b. Click **Go** to choose a Logical Page to set as the Next Logical.

      When you make your choice, the Next Logical and Description fields will automatically fill.

   c. Repeat step b as desired. If needed, click **Add Rows** to add additional rows to the table.
9. Click **Create** to save.

10. Click **Map Flow**.

    This opens the page where you define the conditional branches of a nonlinear flow.

11. Optionally, click **Clear** to clear the content of the fields on the page.

12. Optionally, click **View Flow Family.**

    This opens the page where you view the flow family of a particular flow.

2.115 Updating an Existing Business Flow

Use this procedure to edit the basic settings of an existing business flow.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design > Declarative Page Flows > Business Flows**, then click a flow name in the table

Steps

1. Optionally, type a flow description into the Description field.

2. Optionally, select the Secure check box if the flow is to use HTTPS.

3. Type the name of the Finalization Class into the Finalization Class field.

   This is the name of a Java class. The class implements the FlowFinalizer interface and executes at the end of the Business Flow.

4. Type the name of the Logical Page that should be invoked after the completion of the flow into the Return to Logical field. Optionally, click **Go** to choose from a list of values.

5. Type the name of the first Logical Page in the flow into the Root Logical field. Optionally, click **Go** to choose from a list of values.

6. Click **Update** to save.

7. Click **Map Flow**.

   This opens the page where you define the conditional branches of a nonlinear flow.

8. Optionally, click **Restore** to reset the fields to their original settings.

9. Optionally, click **View Flow Family.**

   This opens the page where you view the flow family of a particular flow.

2.116 Mapping Business Flows

Business Flows are page display sequences that address specific business processes. The Map Flow page allows you to define conditional branches within nonlinear business flows. Use this procedure to set the sequences of Logical Pages within Business Flows.

Prerequisites

- Read Understanding Declarative Page Flows

Steps

1. Choose a Logical Page from the Current Logical Page drop-down list.

   The Current Logical Page is the name of the Logical Page that you are setting up on this screen. After you save your work, you can repeat this entire procedure with another Logical Page within the Business Flow.

2. In the Default Next Logical field, type the name of the Logical Page that displays if there are no Rules in the table below, or if none of the Rules in the table below evaluate to "true." Optionally, click **Go** to choose from a list of values.

3. Edit the table.

   a. Type numbers into the Sequence fields to set the order in which the Rules are evaluated.

   b. In the Next Logical fields, type the name of the Logical Page that you want to display after the Current Logical Page, only if the Rule in the next column evaluates to "true." Optionally, click **Go** to choose from a list of values.

   c. In the Rule Name fields, type name of the Rule that controls whether or not the Logical Page in the previous column displays. Optionally, click **Go** to choose from a list of values.

4. Optionally, click **Add Rows** to add empty rows to the table.

5. Optionally, if you are creating a new Current Logical Page setup and want to clear the fields, then click **Clear**.

6. Optionally, if you are updating an existing Current Logical Page setup and want to reset the fields to their original settings, then click **Restore**.
7. If you are creating a new Current Logical Page setup, then click **Create** to save.

   This opens another Map Flow page where you can repeat this entire procedure with another Current Logical Page.
8. If you are updating an existing Current Logical Page setup, then click **Update** to save.

   This opens another Map Flow page where you can repeat this entire procedure with another Current Logical Page.
9. If you have no more Current Logical Pages to set up, then click **Finish**.

   This completes the procedures of either creating or updating Business Flows.

2.117 Cloning Business Flows

Use this procedure to clone business flows.

Prerequisites

- Read Understanding Declarative Page Flows
- Navigate to **Design** > **Declarative Page Flows** > **Business Flows**, then click **Clone Flow**

Steps

1. Click **Go** to choose the flow from a list of values. Edit the name of the flow if desired.
2. Optionally, click **Restore** to reset the fields to their original settings.
3. Click **Clone** to generate a duplicate of the flow.

   The Flow Details page automatically opens, where you can edit the details of the cloned flow.

2.118 Viewing Flow Families

Use this procedure to view flow families.

Prerequisites

- Read Understanding Declarative Page Flows

Steps

1. Choose one of the flows to be active by selecting the appropriate radio button in the table.
2. Optionally, click **Restore** to reset the fields to their original settings.
3. Click **Update** to save.
4. Optionally, click a flow name in the table.

   This opens the page where you can edit the basic details of an existing flow.

2.119 Using Declarative Components

The Declarative Components framework enables you to quickly develop bins, graphs, reports, graph/report combinations, and LOVs that can be personalized by end users. Key features of the Declarative Components framework include the uniform look and feel of all UI components, compatibility with multiple data sources, and built in security.

You can perform the following tasks from the Declarative Components subtab:

- Managing Components
  - Previewing Components
  - Registering Components
    - Editing Component Metadata
- Defining Bin or Report Columns
  - Editing Bin or Report Column Details
- Managing LOV Columns
  - Editing LOV Column Details
- Defining Graph Metadata
  - Managing Graph Columns
    - Editing Graph Column Details
- Managing Parameters

  - Editing Parameter Metadata
- Managing Component Security
  - Assigning a Responsibility to Components
    * Selecting Components
  - Assigning a Component to Responsibilities
    * Selecting Responsibilities

For information on Declarative Components concepts, see Understanding Declarative Components.

2.120 Managing Components

The main page for Declarative Components is the starting point for viewing, creating, modifying, and previewing bins, graphs, reports, graph/report combinations and LOVs. Use this procedure to manage Declarative Components.

Prerequisites

- Read Understanding Declarative Components
- Navigate to **Design > Declarative Components > Components**

Steps

1. If you want to create a component, then click **Create**.

   This opens the page where you register a new component.

2. If you want to preview a component, then click **Preview**.

   This opens the page where you preview a component.

3. If you want to change the contents of the table, then:

   a. If you want to filter the table by application, then choose an application from the Application drop-down list at the top of the page.

      The page refreshes to display the components that belong to that application.

   b. If you want to filter the table by component type, then choose **All** or a component type from the drop-down list at the top of the page.

The page refreshes to display the components belonging to the component type that you selected.

c. If you want to search by component code, then type the component code into the text entry field and click **Go**.

   The wild card character (%) is allowed. The search is case sensitive.

d. Click **First**, **Previous**, **Next**, and **Last** to navigate within the table.

4. If you want to update or modify a component, then click its component code in the table.

   This opens the page where you update the registration of a component.

5. If you want to set the status of a component, then:

   a. In the Action column, choose **Remove**, **Enabled**, or **Disabled**.

      Removing a component deletes it. You cannot delete a LOV component if it is being used by other components. Enabling a component makes it available for display. Disabling a component makes it unavailable for display or for selection from the homepage.

   b. Click **Update** to save.

2.121 Previewing Components

Use this procedure to preview a declarative component.

- Read Understanding Declarative Components
- Navigate to **Design > Declarative Components > Components**, then click **Preview**

Steps

1. View the preview.

   In the case of a LOV component, the Preview does not have validations. Use the wildcard character (%) in the text entry field.

2. When you are finished, click **OK** to return to the main components page.

2.122 Registering Components

Use this procedure to edit the registration details of a new or existing component.

Prerequisites

- Read Understanding Declarative Components
- Navigate to **Design > Declarative Components > Components**, then either click **Create** or click a component code in the table

Steps

1. If you are creating a new component, then choose an application from the Application drop-down list at the top of the page. If you are updating an existing component, then this field is not editable.
2. If you are creating a new component, then choose **Bin, Report, Graph**, **Graph Report**, or **LOV** from the drop-down list. If you are updating an existing component, then this field is not editable.
3. If you are creating a new component, then type a component code into the Component Code field. If you are updating an existing component, then this field is not editable.

   The maximum length of a component code is 26 characters. A component code must be unique and it cannot contain any spaces or nonalphanumeric characters except underscore (_). It is recommended to prefix the component code with the application short name. For example, "JTF_component_code"
4. Type a descriptive component name into the Component Name field.
5. Optionally, type a description into the Description field.
6. If you want to enable the component, then select the Enable check box. If you want to disable the component, then deselect the Enable check box.
7. If you want to allow the component to be a candidate for display as a Portlet in Oracle Portal, then select the Show as Portal check box. If you deselect this check box, then the component will not be shown in the list of available components for Portlet enabling.
8. Optionally, type an image filename into the Image Filename field.

   If defined, this image is displayed with the Bin Title. The image that you specify must exist in the image file location (/OA_MEDIA/).
9. Ignore the Metadata Source section.

   The only choice for the Type field is **AK**.

   The Declarative Components framework uses the AK Runtime Dictionary to store metadata.

10. Optionally, click **Restore** to restore the fields to their original settings.
11. Click **Update** to save.
12. Click **Next**.

    This opens the page where you can begin editing the metadata associated with this component.

2.123 Editing Component Metadata

Use this procedure to edit the Pre-Process type, Data Source, Title, and other general settings (such as headers and footers) of a new or existing Declarative Component.

Prerequisites

- Read Understanding Declarative Components
- Complete the Registering Components procedure

Steps

1. Edit the Pre-Process section:

   a. If you want to execute a PL/SQL procedure or Java method before the Declarative Components framework extracts the data content for this component, then choose **Java Class Name** or **PL/SQL Procedure** from the Type drop-down list.

      If you do not require a preprocessing event, then leave this field blank and skip to step 2.

   b. Type the preprocessing PL/SQL procedure or Java method into the Name field. The procedure name should be of the format *procedure_name.package_name,* where the package name is the fully qualified package name.

2. Edit the Data Source Provider section:

   a. If you are editing a Bin, Report, Graph, or Graph Report, then choose **HTML, Class Name** or **SQL Query** from the Type drop-down list.

      If you are editing a LOV component, then choose **Class Name** or **SQL Query** from the drop-down list, as the valid data source types for LOV components are Java and SQL.

   b. Type HTML code, a SQL query, or the name of a Java class that implements the DataSource interface into the Name field. If you use a SQL query, then the SELECT statement must not end with a semicolon (;).

3. If you are editing a Bin, Report, Graph, or Graph Report, then edit the Custom Edit link section. This feature is not available for LOVs.

   a. If you do not want a Custom Edit Link, then leave this section blank and skip to step 4. This generates the default **Edit** link that navigates you to the Personalization and Runtime Parameter section.

   b. If you want the Custom Edit Link to have a constant value, then choose **Constant** from the Type drop-down list.

      If you want the Custom Edit Link to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.

   c. If the Custom Edit Link is constant, then type the name of the JSP file into the Name field. If the Custom Edit Link is dynamically generated, then type the name of the PL/SQL package.procedure or Java Class.method into the Name field.

      The PL/SQL procedure must take in a single DEFAULT NULL VARCHAR2 argument and return a VARCHAR2. The Java method should take in a ParameterList and return a String.

   d. If you do not want the Edit link to be generated, then choose **Constant** from in the Type drop-down list and leave the Name field blank.

4. Edit the Title section:

   a. If you want the component title to have a constant value, then choose **Constant** from the Type drop-down list.

      If you want the component title to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.

   b. If the component title is constant, then type the title text into the Name field. If the component title is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Name field.

      The PL/SQL procedure must return a value of the type VARCHAR2.

   c. Choose **Left**, **Right**, or **Center** from the Alignment drop-down list to set how the component title is aligned.

   d. If you are editing a Bin, Report, Graph, or Graph Report and want to allow the end user to personalize the component title, then select the check box labeled Personalizable.

5. If you are editing a Bin, Report, Graph, or Graph Report, then edit the Header section. This feature is not available for LOVs.

   a. If you want the header to have a constant value, then choose **Constant** from the Type drop-down list.

      If you want the header to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.

   b. If the header is constant, then type the text into the Name field. If the header is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Name field.

      The PL/SQL procedure must return a value of the type VARCHAR2.

   c. Choose **Left**, **Right**, or **Center** from the Alignment drop-down list to set how the header is aligned.

   d. If you want to allow the end user to personalize the header, then select the check box labeled Personalizable.

6. If you are editing a Bin, Report, Graph, or Graph Report, then edit the Footer section. This feature is not available for LOVs:

   a. If you want the footer to have a constant value, then choose **Constant** from the Type drop-down list.

      If you want the footer to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.

   b. If the footer is constant, then type the text into the Name field. If the footer is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Name field.

      The PL/SQL procedure must return a value of the type VARCHAR2.

   c. Choose **Left**, **Right**, or **Center** from the Alignment drop-down list to set how the footer is aligned.

   d. If you want to allow the end user to personalize the footer, then select the check box labeled Personalizable.

7. Click **Update** to save.

8. Optionally, click **Next** to save and move on to screens where you can further define the columns and settings of the component.

2.124 Defining Bin or Report Columns

Use this procedure to manage the columns in a new or existing bin or report component. This does not apply to components with a HTML Data Source Type.

Prerequisites

- Read Understanding Declarative Components
- Complete the Editing Component Metadata procedure.

Steps

1. Select or deselect the check box labeled Number Of Rows to enable or disable allowing the end user to personalize the number of rows displayed.
2. Select or deselect the check box labeled Number Of Columns to enable or disable allowing the end user to personalize the number of columns displayed.
3. Optionally, click **First**, **Previous**, **Next**, and **Last** to navigate within the table.
4. If you want to set the status of a column, then choose **Enabled** or **Disabled** from the Action column.

   Enabling a component makes it available for display. Disabling a component makes it unavailable for display.
5. Type integers into the Display Order column to set the display order (from left to right) of the columns in the Bin or Report. Make sure that the values of this field are sequential.
6. Click **Update** to save.
7. Optionally, click **Next**.

   This opens the page where you manage the parameters of the component.
8. If you want to edit the details of a column, then click its name in the table.

   This opens the page where you edit the details of a column.

2.125 Editing Bin or Report Column Details

Use this procedure to edit the details of columns in bin or report components.

Prerequisites

- Read Understanding Declarative Components

- Complete the Defining Bin or Report Columns procedure

Steps

1. Optionally, type a brief description of the column into the Description field.
2. Type an integer into the Display Order field to set the display order of the column.
3. Edit the Label section:
   a. If you want the column label to have a constant value, then choose **Constant** from the Type drop-down list.

      If you want the column label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.

   b. If the column label is constant, then type the text into the Method field. If the column label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Method field.

      The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format ClassName.MethodName.

   c. Choose **Left**, **Right**, or **Center** from the Horizontal Alignment drop-down list to set how the column label is aligned.
   d. Select the check box labeled Hyperlink if you want to display the column as a hyperlink.
   e. If you selected the Hyperlink check box, then type the appropriate URL into the URL field.
   f. Choose the name of the ID column associated with the hyperlink from the ID column drop-down list.
   g. Type a value into the Low Watermark field.

      When the component is displayed, any values below the Low Watermark value will display in a negative color.

   h. Type a value into the High Watermark field.

      When the component is displayed, any values above the High Watermark value will display in a positive color.

4. Click **Update** to save.

5. Click **Component Columns** to return to the page that lists the component's columns.

2.126 Managing LOV Columns

Use this procedure to manage the columns in a new or existing LOV component. The LOVs that you create can be used across applications. LOV means "list of values." It is a UI component that facilitates the completion of a text entry field when there are numerous values that may be assigned. LOVs are a useful alternative to drop-down lists, particularly in cases where displaying a long list of selections in a drop-down list would require excessive scrolling.

In short, when using a LOV to complete a text entry field, you type a query into the field and then click a button labeled "Go." This opens a screen where you view a list of values that match the query you submitted. You can then select the value that you desire and return to the original screen, where what you selected will populate the original text entry field.

Prerequisites

- Read Understanding Declarative Components
- Complete the Editing Component Metadata procedure.

Steps

1. Select a radio button in the Select column of the table to specify that column as searchable.
2. Choose **Enabled** or **Disabled** from the Action column in the table to make the column available or unavailable for display.
3. Type an integer into the Display Order field to set the display order of the column. Make sure that the values of this field are sequential.
4. Click **Update** to save.

   Note that you do not define parameters for LOV components.
5. If you want to edit the details of a column, then click its name in the table.

   This opens the page where you edit the details of a column.

2.127 Editing LOV Column Details

Use this procedure to edit the details of columns in a new or existing LOV component. The LOVs that you create can be used across applications. LOV means "list of values." It is a UI component that facilitates the completion of a text entry field when there are numerous values that may be assigned. LOVs are a useful alternative to drop-down lists, particularly in cases where displaying a long list of selections in a drop-down list would require excessive scrolling.

In short, when using a LOV to complete a text entry field, you type a query into the field and then click a button labeled "Go." This opens a screen where you view a list of values that match the query you submitted. You can then select the value that you desire and return to the original screen, where what you selected will populate the original text entry field.

Prerequisites

- Read Understanding Declarative Components
- Complete the Managing LOV Columns procedure.

Steps

1. Optionally, type a brief description of the column into the Description field.
2. Type an integer into the Display Order field to set the display order of the column.
3. Choose a column type of **Date**, **Number**, or **Varchar2** from the Column Type drop-down list.
4. If the column is searchable on the main LOV columns page, then the check box fields for Display and Carry Over are automatically selected and cannot be deselected. If the column is not searchable on the main LOV columns page, then you can select or deselect these two check boxes.
5. Edit the Label section:

    a. If you want the column label to have a constant value, then choose **Constant** from the Type drop-down list.

    If you want the column label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.

   b. If the column label is constant, then type the text into the Method field. If the column label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Method field.

      The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format ClassName.MethodName.

6. If the column is searchable on the main LOV columns page, then you will see a section for Validation Rules. If the column is not searchable on the main LOV columns page, then this feature is not available.

   a. If you want to choose a Javascript Validation Type, then select **Error** or **Warning** from the drop-down list. Otherwise, leave the field blank.

   b. In the Min. Characters field, type an integer representing the minimum number of characters the user is required to submit when using the LOV component.

   c. In the Min. Characters before % field, type an integer representing the minimum number of characters the user is required to submit before the wildcard character (%) when using the LOV component.

   d. Select or deselect the Auto Append % check box to choose whether or not to automatically append any queries submitted by the user with the wildcard character (%).

   e. If you want to specify the case of the value when it populates the original text entry field, then choose **Lowercase** or **Uppercase** from the Change Case drop-down list.

7. Click **Update** to save.

   Note that you do not define parameters for LOV components.

8. Optionally, click **LOV Column List** to return to the page that lists the component's columns.

2.128 Defining Graph Metadata

Use this procedure to edit the X-axis, Y-axis, and other basic settings of a new or existing graph component.

Prerequisites

- Read Understanding Declarative Components
- Complete the Editing Component Metadata procedure.

Steps

1. Optionally, type a description of the graph into the Description field.
2. If you want the graph title to have a constant value, then choose **Constant** from the Type drop-down list.

   If you want the graph title to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.
3. If the graph title is constant, then type the text into the Method field. If the column label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Method field.

   The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format ClassName.MethodName.
4. Choose a graph type from the Graph Type drop-down list. The options are:
   - Absolute Area
   - Horizontal Clustered Bar
   - Horizontal Stacked Bar
   - Vertical Clustered Bar
   - Vertical Stacked Bar
   - Absolute Line
   - Pie Graph
   - 3-D Bar
5. If you want to allow the end user to personalize the graph type, then select the check box labeled Personalizable.
6. Type pixel values for the X and Y axes of the graph into the XY Size fields.
7. If you want a legend to display with the graph, then select the check box labeled Show Legend.
8. Edit the X-axis section:

   a. If you want the X-axis label to have a constant value, then choose **Constant Value** from the Label Type drop-down list.

      If you want the X-axis label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Label Type drop-down list.

- **b.** If the X-axis label is constant, then type the text into the Method field. If the X-axis label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Method field.

  The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format ClassName.MethodName.

- **c.** Choose **Vertical, Horizontal** or **Slanting** from the Tick Label Orientation drop-down list.

  Vertical orientation tilts the tick label 90 degrees. Horizontal orientation tilts the tick label 180 degrees. Slanted orientation tilts the tick label 270 degrees.

9. Edit the Y-axis section:

   - **a.** If you want the Y-axis label to have a constant value, then choose **Constant Value** from the Label Type drop-down list.

     If you want the Y-axis label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Label Type drop-down list.

   - **b.** If the Y-axis label is constant, then type the text into the Method field. If the Y-axis label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Method field.

     The PL/SQL procedure must return a value of the type VARCHAR2. Java method must be of the format ClassName.MethodName.

   - **c.** Choose **Vertical, Horizontal** or **Slanting** from the Tick Label Orientation drop-down list.

     Vertical orientation tilts the tick label 90 degrees. Horizontal orientation tilts the tick label 180 degrees. Slanted orientation tilts the tick label 270 degrees.

   - **d.** Choose **Yes** or **No** from the Auto Scale drop-down list.

     If you choose Yes, then the minimum and maximum values displayed on the Y-axis are determined by BI Beans, depending on the graph data. If you choose No, then the minimum and maximum values displayed on the Y-axis are specified manually.

   - **e.** If you chose No in step d, then type an integer into the Tick Size field to specify the interval on the Y-axis scale.

   - **f.** If you chose No in step d, then enter integers into the Min. Scale and Max. Scale fields.

10. Click **Update** to save.

11. Click **Next** to open the page where you manage the columns of the graph component.

2.129 Managing Graph Columns

Use this procedure to view, update, and remove columns in a graph component.

Prerequisites

- Read Understanding Declarative Components
- Complete the Defining Graph Metadata procedure.

Steps

1. If you want to set the status of a column, then choose **Enabled** or **Disabled** from the Action column.

   Enabling a component makes it available for display. Disabling a component makes it unavailable for display.

2. For each column, choose **X-axis**, **Y-axis**, or **SubX-axis** from the Axis drop-down list.
3. Type integers into the Sequence fields to set the sequence of the columns.
4. Click **Update** to save.
5. Optionally, click **Next**.

   This opens the page where you manage the parameters of the component.

6. If you want to edit the details of a column, then click its name in the table.

   This opens the page where you edit the details of a column.

2.130 Editing Graph Column Details

Use this procedure to edit the details of new or existing columns in graph components.

Prerequisites

- Read Understanding Declarative Components
- Complete the Managing Graph Columns procedure

Steps

1. Optionally, type a description into the Description field.
2. Edit the Label section:
   a. If you want the column label to have a constant value, then choose **Constant Value** from the Type drop-down list.

      If you want the column label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the Type drop-down list.

   b. If the column label is constant, then type the text into the Method field. If the column label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the Method field.

      The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format ClassName.MethodName.
3. Edit the Axis section:
   a. Choose **X-axis**, **Y-axis**, or **SubX-axis** from the Plot drop-down list.
   b. Type the appropriate integer into the Sequence field.

      The sequence number is with respect to axis information. It is the indexing information for columns mapped on the same axis. For example, if COL1 and COL3 are plotted on the Y-axis, then they should have the sequence numbers 1 and 2, respectively. COL2 plotted on the X-axis should have the sequence number 1.
4. Click **Update** to save.
5. Click **Graph Columns** to return to the page that lists the component's columns.

2.131 Managing Parameters

Use this procedure to create, update, and remove component parameters. You can define date pickers (calendars), text input fields, drop-down lists, multi-select lists, and hidden fields.

Prerequisites

- Read Understanding Declarative Components

- You reach this page by clicking **Next** from the column summary page of a component. See Defining Bin or Report Columns and Managing Graph Columns.

Steps

1. Optionally, click **First**, **Previous**, **Next**, and **Last** to navigate within the table.
2. If you want to create a parameter, then click **Create Parameter**.

   This opens the page where you edit the details of a new parameter.
3. If you want to delete a parameter, then select the appropriate check box in the Remove column of the table.
4. Type integers into the Sequence fields to set the order in which the parameters will be rendered. This order is also used in parameter value resolution.
5. Click **Update** to save.
6. If you want to edit the details of a parameter, then click its name in the table.

This opens the page where you edit the details of an existing parameter.

2.132 Editing Parameter Metadata

Use this procedure to edit the details of a new or existing component parameter.

Prerequisites

- Read Understanding Declarative Components
- Complete the Managing Parameters procedure

Steps

1. Type a unique parameter name into the Parameter Name field.
2. Optionally, type a brief description into the Description field.
3. If you want the parameter to be rendered on the parameter page, then select the check box labeled Enable.
4. If you want to allow the end user to personalize the parameter, then select the check box labeled Personalizable.
5. Choose **VARCHAR2**, **Number**, or **Date** from the Parameter Data Type drop-down list.

6. Choose **Calendar**, **Drop Down, Hidden**, **LOV**, **Multiselect**, or **Text** from the Item Style drop-down list.

   For drop-down lists, you are responsible for writing a well-tuned query that will return the number of rows as recommended by the UI team. For hidden fields, the end user will not see the parameter, but you can use the value as needed (for example, passing ID columns).

7. If you chose the Item Style Drop Down in step 6, then type the appropriate source SQL query into the SQL for Dropdown field.

8. If you chose the Item Style LOV in step 6, then the screen refreshes to display a section about LOV details. This section includes fields for LOV App Id, LOV Component Code, and Mapped LOV Column:

   a. Choose an LOV App Id from the drop-down list. This is the application that owns the LOV component. When you have chosen the application, the screen refreshes to display a list of LOV components specific to that application.

   b. Choose a LOV component from the list of available choices. The screen refreshes to display the list of searchable columns that can be mapped to the current parameter.

   c. Choose the Searchable LOV column and map it to this parameter.

   d. You may need to create additional parameters if you want to carry over ID Columns.

9. If you chose the Item Style LOV in step 6 and there is a LOV parameter already defined for this component, then the screen refreshes to display a drop-down list called Related LOV Parameter. The drop-down list contains all the LOV parameters that have been defined for this component:

   a. Choose a LOV parameter as the Related LOV parameter. The screen refreshes to display a list of the Carried Over Column(s) of the chosen LOV parameter.

   b. The Mapped LOV Column drop-down list displays the LOV Columns that have been defined to be carried over. Therefore, you can use the value of this Mapped LOV Column, for example, in a Data Source Query.

10. Edit the Default Value Setting section:

    a. Choose **Constant**, **PL/SQL**, or **Java** from the Type drop-down list.

    b. If you chose Constant in step a, then type the text of the default value into the Name field.

If you chose PL/SQL in step a, then type the complete signature of a PL/SQL function, including any package name, into the Name field. This function must return a Varchar2. For example, My_Package.Get_Default_Value(?P_Context). Optionally, the function can take a p_context as an argument.

If you chose Java in step a, then type the signature of a Java method into the Name field, in the format *package_name.function_name*. This method must return a string.

11. Click **Update** to save.
12. Optionally, click **Component Parameter** to return to the page that lists the component's parameters.

2.133 Managing Component Security

Use this procedure to manage component security assignments.

Prerequisites

- Read Understanding Declarative Components
- Navigate to **Design > Declarative Components > Component Security**

Steps

1. Choose a radio button, **Component to Responsibilities** or **Responsibility to Components**.
2. Click **Next**.

   This opens the page where you choose either the component that you will be mapping to responsibilities or the responsibility that you will be assigning to components.

2.134 Assigning a Component to Responsibilities

Use this procedure to assign a component to one or more responsibilities.

Prerequisites

- Read Understanding Declarative Components
- Navigate to **Design > Declarative Components > Component Security**, then select the radio button labeled Component to Responsibilities

Steps

1. Choose an application from the Application Code drop-down list.
2. Choose a component code from the Component Code drop-down list.
3. Click **Next** to continue.

2.135 Selecting Responsibilities

Use this procedure to select which responsibilities will apply to the component that you have chosen.

Prerequisites

- Read Understanding Declarative Components
- Complete the Assigning a Component to Responsibilities procedure

Steps

1. Choose the name of a responsibility in one list and click **>** or **<** to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all Available Responsibilities to the Selected Responsibilities list, then click >>.
4. If you want to move all Selected Responsibilities to the Available Responsibilities list, then click <<.
5. Optionally, choose an application short code from the Responsibility App Code drop-down list.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

2.136 Assigning a Responsibility to Components

Use this procedure to assign a responsibility to one or more components.

Prerequisites

- Read Understanding Declarative Components

- Navigate to **Design > Declarative Components > Component Security**, then select the radio button labeled Responsibility to Components

Steps

1. Choose an application from the Responsibility App Code drop-down list.
2. Choose a responsibility from the Responsibility drop-down list.
3. Click **Next** to continue.

2.137 Selecting Components

Use this procedure to select which components will apply to the responsibility that you have chosen.

Prerequisites

- Read Understanding Declarative Components
- Complete the Assigning a Responsibility to Components procedure

Steps

1. Choose the name of a component in one list and click > or < to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all Available Components to the Selected Components list, then click >>.
4. If you want to move all Selected Components to the Available Components list, then click <<.
5. Optionally, choose an application from the Component App Code drop-down list.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

2.138 Setting Navigation Preferences

Use this procedure to set navigation preferences.

Prerequisites

- Navigate to **Profile > Navigation Preferences**

Steps

1. If you want to change your current responsibility, then choose an option from the Current Responsibility drop-down list.
2. If you want to set default responsibilities for registered Navigation Groups, then choose from the drop-down lists in the Set Default Responsibility table.

   For information on Navigation Groups, see Understanding Site Preferences and Using Site Preferences.
3. Optionally, click **Restore** to reset the fields to their original settings.
4. Click **Update** to save.

2.139 Setting Display Preferences

Use this procedure to set display preferences.

Prerequisites

- Navigate to **Profile > Display Preferences**

Steps

1. Choose options from the drop-down lists in the General Display section to select language, currency, date format, and display style settings.
2. Choose numbers from the drop-down lists in the Table Display section to select how many table to display per page and how many blank rows to display per page.
3. Choose the radio button that suits how you want the Quick Find to return result.
4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Update** to save.

2.140 Setting Up the Quick Menu

The Quick Menu is a feature that allows you to display links to your most frequently visited pages on the Introduction pages of every subtab of the System Administrator Console.

Use this procedure to choose which pages have links in the Quick Menu and also turn the Quick Menu on or off.

Prerequisites

- Navigate to **Profile > Quick Menu**

Steps

1. Select the check box at the top of the page if you want to use the Quick Menu.
2. Choose the name of a menu in one list and click **>** or **<** to move it to the other list.
3. Repeat step 2 as desired.
4. If you want to move all Available Menus to the Favorite Menus list, then click >>.
5. If you want to move all Favorite Menus to the Available Menus list, then click <<.
6. Optionally, click the up and down arrows to change the sequence of menus in the Favorite Menus list.
7. Optionally, click **Restore** to reset the fields to their original settings.
8. Click **Update** to save.

2.141 Changing Your Password

Use this procedure to change your password.

Prerequisites

- Navigate to **Profile > Change Password**

Steps

1. Type your current password into the Current Password field.
2. Type your new password into the New Password field.

Passwords must be at least six characters long.

3. Retype your new password into the Re-Enter New Password field.
4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Update** to save.

2.142 Setting Personal Information

Use this procedure to edit your personal information.

Prerequisites

- Navigate to **Profile > Personal Information**

Steps

1. Edit the fields as desired.
2. Optionally, click **Restore** to reset the fields to their original settings.
3. Click **Update** to save.

2.143 Setting Address Information

Use this procedure to edit your address information.

Prerequisites

- Navigate to **Profile > Address Information**

Steps

1. Edit the fields as desired.
2. Optionally, click **Restore** to reset the fields to their original settings.
3. Click **Update** to save.