

Oracle® Interaction Blending

Implementation Guide

Release 11*i*

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Oracle Interaction Blending Implementation Guide, Release 11i

Part No. B10182-01

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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Interaction Blending Implementation Guide.

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

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

If you have never used Oracle Interaction Blending, Oracle suggests you attend one or more of the Interaction Center training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

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

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

[Chapter 2, "Before You Begin"](#), describes the technology stack for Oracle Interaction Blending and the Oracle Interaction Blending architecture. This chapter also lists the

minimum hardware and software configuration for Oracle Interaction Blending. This chapter also describes applications that are required for Oracle Interaction Blending to function or that provide additional functionality.

[Chapter 3, "Implementation Overview"](#), describes the implementation process and lists the implementation steps.

[Chapter 4, "Implementation Tasks"](#), provides task-based procedures for implementing Oracle Interaction Blending.

[Chapter 5, "Integrating Interaction Blending with Other Oracle Applications"](#), describes how to integrate Oracle Interaction Blending with other Oracle Applications.

[Appendix A, "Oracle Interaction Blending Profile Options"](#), lists profile options for Oracle Interaction Blending.

Documentation Accessibility

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

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

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

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

Online Documentation

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

Related Documentation

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to This Product

Oracle Universal Work Queue Concepts and Procedures

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

Oracle Applications Interaction Center Implementation Guide

Use this guide to implement Interaction Center Server Manager.

Oracle Advanced Inbound Implementation Guide

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

Oracle Advanced Outbound Implementation Guide

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

Oracle Scripting Implementation Guide

Use this guide to implement Oracle Scripting.

Oracle eMail Center Implementation Guide

Use this guide to implement Oracle eMail Center.

Oracle Interaction Center Intelligence Implementation Guide

Use this guide to implement Oracle Interaction Center Intelligence.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle eTechnical Reference Manuals

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Interaction Blending working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle⁸ⁱ server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With *OracleMetaLink*, you can obtain

information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160

software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

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

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

Introduction

This chapter provides information on the following topics:

- [Section 1.1, Oracle Interaction Center Overview](#)
- [Section 1.2, Oracle Interaction Blending Overview](#)
- [Section 1.3, New in this Release](#)
- [Section 1.4, Obsolete in this Release](#)
- [Section 1.5, Architecture and Technology](#)
- [Section 1.6, Minimum Software Requirements](#)
- [Section 1.7, Minimum Hardware Requirements](#)

1.1 Oracle Interaction Center Overview

Every customer interaction — a telephone call, an e-mail message, or a Web chat conversation — presents an opportunity to win new business or improve customer satisfaction. The Oracle Interaction Center supports the management and processing of customer relationship activity across all channels of customer contact.

The Oracle Interaction Center integrates with several customer relationship business applications in the Oracle eBusiness Suite. The Oracle Interaction Center consists of several modules. The modules relating to inbound telephony and outbound telephony are bundled separately.

The Oracle Interaction Center allows access to centralized customer information and business application functionality. Oracle Interaction Center integrates with front office applications (known as Customer Relationship Management or CRM), and back office applications (Enterprise Relationship Planning or ERP), thereby enabling a workflow powered, end-to-end strategic e-business solution.

The Oracle Interaction Center products include:

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)
- [Oracle Universal Work Queue](#)
- [Oracle Interaction Center Intelligence](#)
- [Oracle Interaction Blending](#)

See Also

- [Section 1.2, Oracle Interaction Blending Overview](#)
- [Section 1.3, New in this Release](#)

1.1.1 Oracle Advanced Inbound

Oracle Advanced Inbound (AI) is required to telephony enable business applications in the Oracle eBusiness Suite. "Telephony-enabled" means that the product has the capability of communicating with a telephone system for inbound calls, outbound calls, or both via the CTI middleware that handles the messaging between a telephone switch and the user's application. Oracle Advanced Outbound provides the corresponding outbound telephony capability.

The Oracle Advanced Inbound bundle consists of the following products: Call Center Technology, Oracle Universal Work Queue, Oracle Telephony Manager, and Oracle Interaction Blending.

See Also

- [Oracle Advanced Outbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)
- [Oracle Universal Work Queue](#)
- [Oracle Interaction Center Intelligence](#)

1.1.2 Oracle Advanced Outbound

Oracle Advanced Outbound (AO) is another key part of the Oracle eBusiness Suite of applications. It is the module of Oracle Interaction Center that addresses outbound telephony. AO consists of two main components:

- A tactical list manager, which determines who to call and when to call them
- An outbound dialing engine, which dials numbers and transfers live contacts to call center agents

Advanced Outbound integrates with and relies on Oracle Marketing Online (OMO) to create campaigns and lists to execute. AO serves as the execution arm for these marketing lists to maximize both outbound list penetration and agent productivity. AO also integrates with desktop applications like Oracle TeleSales and Oracle Collections to handle the actual customer interactions. Oracle Advanced Outbound can be used any time agents need to contact parties via the telephone.

AO also integrates with Oracle Interaction History to provide feedback that marketers can use to analyze and measure the success of the marketing campaign, thereby providing a closed-loop marketing process.

Oracle Advanced Outbound does not include any other telephony management modules, and thus requires the use of Oracle Advanced Inbound.

See Also

- [Oracle Advanced Inbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)
- [Oracle Universal Work Queue](#)
- [Oracle Interaction Center Intelligence](#)

1.1.3 Oracle eMail Center

Oracle eMail Center (eMC) is designed to satisfy requirements for inbound customer support, e-mail interaction management, and outbound sales and marketing e-mail message processing.

Oracle eMail Center helps your business respond to e-mail queries with clear and comprehensive replies in a much more efficient manner. eMC automatically generates suggested responses and scores them according to how closely they match the requirements.

See Also

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle Scripting](#)
- [Oracle Universal Work Queue](#)
- [Oracle Interaction Center Intelligence](#)

1.1.4 Oracle Scripting

Oracle Scripting is a set of tools to create and display information sequentially to end users. Oracle Scripting is composed of three components: the Script Author, the Scripting Engine, and the Survey Component.

Oracle Scripting end users include interaction center agents (for the Scripting Engine), and customers or prospects using a Web browser (using the Survey component). Other users include individuals who build the scripts (Script Author users) and administrators of scripting or survey campaigns, who must access the Survey Admin console.

Using Oracle Scripting, an enterprise gains the ability to develop and deploy scripted presentations for customer interactions with agents, as well as build, deploy, and execute information-gathering survey campaigns for data which can be mined and used to tailor sales and service campaigns or improve customer satisfaction.

See Also

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)
- [Oracle Universal Work Queue](#)
- [Oracle Interaction Center Intelligence](#)

1.1.5 Oracle Universal Work Queue

Oracle Universal Work Queue is an agent portal that presents and delivers work items generated through customer contact channels or CRM business applications.

Agents can select work directly from the Oracle Universal Work Queue desktop user interface.

Work which originates from a customer contact channel, such as a telephone call or an e-mail, is called a media work item. Work which originates from a CRM business application, such as a task or lead, is called an application work item. You can set up Oracle Universal Work Queue to handle application work items only, or both application and media work items.

See Also

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)
- [Oracle Interaction Center Intelligence](#)

1.1.6 Oracle Interaction Center Intelligence

Oracle Interaction Center Intelligence is a Web-based reporting solution that provides intelligent reports that facilitate day-to-day operational and long-term strategic decisions.

The data is presented to the user in a easy-to-use portal format. This format gives the user a unified, role-based, easily customizable view of Interaction Center information, including Oracle Universal Work Queue information, key performance metrics relating to agent productivity, speed to answer, and abandon rate.

The product is built on an Oracle proprietary Java-based technology stack (Oracle CRM Foundation, also known as JTF). Users of Interaction Center Intelligence require minimal training, and no additional software is needed on the user's machine other than a Web browser.

Oracle Interaction Center Intelligence is based on a three-tier architecture:

- The front end (client) using the system via an Oracle Applications-compliant Web browser.
- The middle tier, which contains the Apache Web server and application server, included as part of the installation of Oracle Applications release 11*i*.
- The database tier, using an Oracle 8*i* or 9*i* database.

See Also

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle eMail Center](#)
- [Oracle Scripting](#)
- [Oracle Universal Work Queue](#)

1.2 Oracle Interaction Blending Overview

Oracle Interaction Blending provides the ability to "blend" voice calls between inbound and outbound agents. For instance, as inbound call volumes decrease, agents can dynamically move to handle incoming e-mail or outbound phone calls. This significantly increases agent productivity and improves customer service. Oracle Interaction Blending assigns agents to handle inbound and outbound media depending on call volume and service levels.

See Also

- [Section 1.1, Oracle Interaction Center Overview](#)
- [Section 1.3, New in this Release](#)
- [Section 1.4, Obsolete in this Release](#)
- [Section 1.5, Architecture and Technology](#)
- [Section 1.6, Minimum Software Requirements](#)
- [Section 1.7, Minimum Hardware Requirements](#)

1.2.1 Oracle Interaction Blending Features

The features of Oracle Interaction Blending are as follows:

- Ability to create Interaction Blending services
- Ability to create service categories for blending
- Ability to create inbound and outbound service plans
- Blending and distribution of agents to support multiple work queues, media types, and service levels
- Supports inbound, outbound, and e-mail media activities

- Supports agents with multiple skill sets

1.3 New in this Release

Topics include:

- Interaction Blending Server Groups
- Interaction Blending Servers
- Routing and Classifications
- Interaction Blending Service Categories
- Classification Values
- PL/SQL Functions
- Assignment of Classification Rules to Specific Server Groups and Media Types

See Also

- Oracle Interaction Implementation Guide
- Oracle Advanced Inbound Implementation Guide

1.3.1 Interaction Blending Server Groups

Interaction blending server groups and server processes are administered using the Call Center HTML Administration responsibility in Interaction Center Server Manager. The Interaction Center Server Manager (ICSM) is a Java server process that starts, stops and monitors interaction server processes. It is required to run any interaction center server.

See Also

- [Section 1.3.1, Interaction Blending Server Groups](#)
- [Section 1.3.2, Interaction Blending Servers](#)
- Oracle Interaction Center Implementation Guide

1.3.2 Interaction Blending Servers

Interaction blending servers are created in Interaction Center Server Manager from the Blending Server tab. Inbound interactions are mapped by classification.

Outbound interactions are mapped by campaign. The Interaction Blending server maps interactions to service categories.

See Also

- [Section 1.3.1, Interaction Blending Server Groups](#)
- [Section 1.3.2, Interaction Blending Servers](#)
- Oracle Interaction Center Implementation Guide

1.3.3 Routing and Classifications

Interaction center administration activities, including routing and call classification is administered from the Classification tab in Interaction Center Server Manager. Use the Call Center HTML Administration responsibility.

See Also

- [Section 1.3.1, Interaction Blending Server Groups](#)
- [Section 1.3.2, Interaction Blending Servers](#)
- [Section 1.3.5, Classification Values](#)
- [Section 1.3.6, PL/SQL Functions](#)
- Oracle Interaction Center Implementation Guide

1.3.4 Interaction Blending Service Categories

Interaction Blending service categories are created from the Blending Server tab using the Interaction Blending Administrator responsibility. Interaction Blending ships with the following default categories:

- Advanced Outbound Telephone
- Inbound Telephone
- Inbound Web Callback
- Inbound Web Collaboration
- Outbound Telephone

See Also

- [Section 1.3.1, Interaction Blending Server Groups](#)

- [Section 1.3.2, Interaction Blending Servers](#)
- Oracle Interaction Center Implementation Guide

1.3.5 Classification Values

Classification is the process by which incoming calls are assigned a specific string value for identification. The specific string value is called a "classification value". Classification values specify how incoming calls are identified and which Oracle business application should be used to launch the screen pop with the caller data. Oracle Interaction Blending uses classification values to determine the blending and routing of interactions. Classification values are also used by Oracle Universal Work Queue to identify telephony call queues and Oracle Interaction Center Intelligence uses them for reporting.

The assignment of classification values is accomplished in the Classification Values page and is accessed from the Classification tab in ICSM. Use Call Center HTML Administration responsibility.

1.3.6 PL/SQL Functions

A classification value may also be derived dynamically from a PL/SQL function using the interaction data during the classification process. PL/SQL functions are defined in the PLSQL Functions page and must return any one of the classification values that are defined in the Classification Values page. If the PL/SQL function returns a value that is not in the Classification Values page, the call will be identified as "unclassified". The PL/SQL function may return the classification value in one of the following ways:

- A return value for the PL/SQL function
- An OUT parameter for the PL/SQL function

The PLSQL Functions page is accessed from the Classification tab in the ICSM. Use Call Center HTML Administration responsibility.

1.3.7 Classification Rules

Classification rules determine how a call gets classified and determine the classification value to be assigned to a call. A classification rule consists of the following process parameters:

- A time out value in seconds.

This value specifies the time after which the call will be rerouted if it has not been serviced by an agent.

- A set of conditions by which the classification rule is satisfied.
- A classification value to be assigned to the call if the set of conditions are satisfied;
- or,
- A PL/SQL function from which the classification value must be derived, if the set of conditions are satisfied.
- An ability to add additional key-value pairs to the incoming call if the set of conditions are satisfied.
- An ability to assign the classification rule to specific media types.
- An ability to assign the classification rule to specific server groups.

The Classification Rules page is accessed from the Classification tab in the ICSM. Use Call Center HTML Administration responsibility.

1.4 Obsolete in this Release

Topics include:

- Literal Classifications
- Database Procedure Classifications

Literal Classifications

The term "literal classifications" is no longer in use; however, the classification of interaction keys is still accomplished through the use of interaction key data.

Database Procedure Classifications

The term "database procedure classifications" has been replaced by defined PL/SQL functions that return any one of the classification values.

See Also

- [Section 1.3.5, Classification Values](#)
- [Section 1.3.6, PL/SQL Functions](#)
- Oracle Advanced Inbound Implementation Guide

- Oracle Interaction Center Implementation Guide

1.5 Architecture and Technology

Oracle Interaction Blending consists of the following main components:

- ICSM
- Oracle Applications Foundation (FND)
- CRM Foundation (JTF)
- Common CRM Interaction Center Technology Schema (IEO)
- Oracle Universal Work Queue
- Oracle Telephony Manager — Routing Server

See Also

- Oracle Advanced Inbound Implementation Guide

1.6 Minimum Software Requirements

Oracle Interaction Blending Release 11*i* requires, at minimum, Oracle Applications 11*i* that was installed from any Oracle Applications 11*i* Rapid Install or Platinum and upgraded to Release 11*i*.

Full License Installation Requirements

All Oracle Interaction Blending implementations require full license installation. *Do not install Interaction Blending with the "Shared" option.* Shared mode, which sets the Install flag at "S" (Shared), is only used when an unlicensed application provides a key component to a licensed application. In order for Oracle Interaction Blending to function appropriately, the Install flag must be set to "I" (fully Installed).

See Also

- [Section 2.2, Dependencies](#)

1.7 Minimum Hardware Requirements

Oracle Interaction Blending shares the same requirements for hardware as indicated by Oracle Applications release 11*i*. There are no Interaction Blending-specific hardware requirements.

Before You Begin

This chapter provides an overview of the implementation process and includes any dependencies that Oracle Interaction Blending has and shares with other products and components.

Topics include:

- [Section 2.1, Related Documentation](#)
- [Section 2.2, Dependencies](#)
- [Section 2.3, Dependency Verification](#)
- [Section 2.4, Sizing Guidelines](#)
- [Section 2.5, Scalability of Oracle Interaction Blending](#)

2.1 Related Documentation

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to This Product

Oracle Interaction Center Implementation Guide

Use this guide to implement Interaction Center Server Manager.

Oracle Universal Work Queue Concepts and Procedures

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

Oracle Advanced Inbound Implementation Guide

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

Oracle Advanced Outbound Implementation Guide

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

Oracle Scripting Implementation Guide

Use this guide to implement Oracle Scripting.

Oracle eMail Center Implementation Guide

Use this guide to implement Oracle eMail Center.

Oracle Interaction Center Intelligence Implementation Guide

Use this guide to implement Oracle Interaction Center Intelligence.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle eTechnical Reference Manuals

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Interaction Blending working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle*8i* server, and your hardware and software environment.

Oracle*MetaLink*

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

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

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

2.2 Dependencies

Oracle Interaction Blending has a number of integration points with other Oracle Applications.

Topics include:

- Section 2.2.1 Mandatory Dependencies
- Section 2.2.2 Conditional Dependencies

2.2.1 Mandatory Dependencies

From an implementation perspective, mandatory dependencies are applications or components which must be implemented prior to implementing Oracle Interaction Blending, and are required in order for Oracle Interaction Blending to function. Oracle Interaction Blending has references to the common and shared components of the following products:

- Oracle Applications Foundation (FND)
- CRM Foundation (JTF)
- Common CRM Interaction Center Technology Schema (IEO)
- Oracle Universal Work Queue
- Oracle Telephony Manager — Routing Server
- Oracle Interactive Voice Response Integration (IVR)

See Also

Conditional Dependencies

2.2.2 Conditional Dependencies

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

See Also

Mandatory Dependencies

2.3 Dependency Verification

Complete installation and implementation steps as outlined in the following documents:

- Installing Oracle Applications
- Oracle Applications Supplemental CRM Installation Steps
- Oracle System Administrator's Guide

Create users and assign Interaction Blending Administrator, Call Center HTML Administration and System Administrator responsibility to one or more administrative level users. All of the Oracle Oracle Interaction Blending tasks can be completed using these responsibilities.

2.4 Sizing Guidelines

Oracle Interaction Blending complies with the general sizing recommendations for the Oracle database and Oracle Applications used in your business operations.

See Also

- Interaction Center
- Interaction Blending Overview
- Dependencies
- Scalability

2.5 Scalability of Oracle Interaction Blending

Oracle Interaction Blending complies with the general scalability recommendations for the Oracle database and Oracle Applications used in your business operations.

See Also

- Interaction Center
- Interaction Blending Overview
- Dependencies
- Sizing

Implementation Overview

This chapter provides an overview of the implementation process and the tasks required to set up Oracle Interaction Blending.

Topics include:

- [Section 3.1, Process Description](#)
- [Section 3.2, Implementation Task Sequence](#)

3.1 Process Description

This implementation guide assumes that at a minimum, you have performed the following:

- Installed Oracle Applications (database, technology stack, and Oracle Applications files).
- Installed JInitiator on the agent desktop.
- Optionally, implemented Oracle Human Resources Management Systems.
- Implemented CRM Foundation Resource Manager.
- Implemented Oracle eMail Center, installed Microsoft Internet Explorer on the agent desktop -- otherwise, installed Netscape Communicator.
- Implemented either Oracle TeleSales or Oracle Support
- Installed and configured the media layer -- telephony or e-mail.
- Installed and configured the appropriate interaction servers.
- Implemented Oracle Universal Work Queue.

See Also

- Installing Oracle Applications
- Upgrading Oracle Applications
- Implementing Oracle HRMS
- Oracle CRM Foundation Implementation Guide
- Oracle TeleSales Implementation Guide
- Oracle Support Implementation Guide
- Oracle Advanced Inbound Implementation Guide
- Oracle Advanced Outbound Implementation Guide
- Oracle eMail Server documentation
- Oracle Interaction Center Implementation Guide
- Oracle Universal Work Queue Implementation Guide

3.2 Implementation Task Sequence

The following is a list of the steps required to successfully implement Oracle Interaction Blending and the sequence in which they need to be performed.

1. Implement an Interaction Center Server Manager node.
2. Implement Interaction Queue and Distribution server.
3. Implement Oracle Telephony Manager server(s).
4. Implement Oracle Routing server(s).
5. Implement Oracle Inbound Telephony server(s).
6. Implement Oracle Universal Work Queue server(s).
7. Define an administrator for Oracle Interaction Blending
8. Implement a single-site or multi-site Interaction Center (server groups)
9. Implement Oracle Interaction Blending server(s).
10. Create Interaction Center agents.
11. Implement Oracle Advanced Inbound.
12. Implement Oracle Advanced Outbound.

- 13.** Configure Oracle Interaction Blending profile option.
- 14.** Configure Oracle Interaction Blending to blend inbound and outbound media work.
- 15.** Create service categories for inbound outbound media.
- 16.** Create service plans for inbound and outbound media.
- 17.** Define plan segments.

Implementation Tasks

This chapter describes the setup and configuration tasks required to successfully implement Oracle Interaction Blending.

Topics include:

- [Section 4.1, "Creating an Administrator for Oracle Interaction Blending"](#)
- [Section 4.2, "Creating an Interaction Center Agent"](#)
- [Section 4.3, "Creating an Employee"](#)
- [Section 4.4, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.5, "Setting Up Employees as Users"](#)
- [Section 4.6, "Importing a Resource"](#)
- [Section 4.7, "Setting Profile Options"](#)
- [Section 4.8, "Creating Interaction Blending Server Groups and Server Processes"](#)
- [Section 4.9, "Creating Service Plans"](#)
- [Section 4.10, "Creating a Service Category"](#)
- [Section 4.11, "Implementing a Single-Site Interaction Center"](#)
- [Section 4.12, "Defining Routing and Classifications"](#)
- [Section 4.13, "Administering Oracle Interaction Blending"](#)

4.1 Creating an Administrator for Oracle Interaction Blending

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

Login

Oracle Forms Applications

Responsibility

System Administrator

Prerequisites

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

Steps

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

The Users window appears.

2. In the User Name field, enter the name of the user. Use the following guidelines to define Oracle Application usernames:

- Use only one word.
- Alphanumeric characters ('A' through 'Z', and '0' through '9').
- Character sets that are supported by your operating system.

3. In the Password field, enter a password for the user account. Use the following guidelines for creating passwords for user accounts.

- Minimum of 5 characters.
- Maximum of 100 characters.
- Alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.

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

The cursor remains in the Password field.

4. Press **Tab**.

You will return to the Password field. You will need to re-enter the password for validation purposes. Once you re-enter the password, press Tab again.

Note: The password is temporary. When the user logs into Oracle Applications for the first time, the message "Your password has expired" will appear and the user will then be prompted to enter a new password.

5. In the Responsibilities tab, add the following responsibilities.

Responsibility	Function	Type
System Administrator	Create user accounts.	Forms
Call Center HTML Administration	Define blending servers.	HTML
Interaction Blending Administrator	Create service plans and service categories.	HTML
CRM Resource Manager	Import a resource.	Forms
US HRMS Manager	Create employees.	Forms

Note: Once the user record has been saved, you cannot delete an assigned responsibility. Oracle Applications maintains audit data for assigned responsibilities. To deactivate an assigned responsibility, set the effective end date in the Effective Dates - To field for the assigned responsibility to the current date. To activate an assigned responsibility, clear or reset the effective end date.

6. From the **File** menu, choose **Save**.
7. Close the Users window.

See Also

- [Section 4.2, "Creating an Interaction Center Agent"](#)
- [Section 4.3, "Creating an Employee"](#)
- [Section 4.4, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.5, "Setting Up Employees as Users"](#)
- [Section 4.6, "Importing a Resource"](#)
- [Section 4.7, "Setting Profile Options"](#)

- *Oracle Applications Systems Administrator's Guide*

4.2 Creating an Interaction Center Agent

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

An application user is granted one or more responsibilities. A responsibility is a level of authority in Oracle Applications that allows a user to access specific Oracle Applications functions.

An application user enters a username to sign on to Oracle Applications. It is helpful to define meaningful usernames, such as the first initial and last name of an employee, or for a group account, the name of the group.

An application user enters a password along with his/her username to sign on to Oracle Applications.

All Oracle Applications are installed with predefined responsibilities. Instances of the major components that help define a responsibility (data groups, request security groups, menus, and functions) are predefined for Oracle Applications. A system administrator can assign users any of the standard responsibilities provided with Oracle Applications or create new custom responsibilities. The responsibility key is a unique name for a responsibility. After the responsibility records are saved, the responsibility key cannot be updated. However, the responsibility name can be changed at any time. If a user has more than one responsibility, then the responsibility name appears in the Responsibilities window after a user signs on to the Oracle Application.

You will need to perform the following steps to create an interaction center agent for Oracle Interaction Blending.

Note: An administrator must be defined for the interaction center. Once defined, that user will have all of the responsibilities necessary to create interaction center agents.

1. Create an employee.
2. Create an Oracle Applications user account.
3. Create a resource for the employee.

4. Configure system profile options.
5. Configure resource roles and assign responsibilities for the newly created resource.
6. Create group member roles and usage for an agent.

This step applies to implementations that also include Oracle Telesales and is performed in CRM Resource Manager.

7. Configure interaction center parameters for the agent.

This step applies to media work only and configuration must be performed for interaction center server group and telephony parameters. These parameters are defined using CRM Resource Manager.

See Also

- *Oracle Interaction Center Implementation Guide*

4.3 Creating an Employee

The agent who will be using Oracle Interaction Blending must first be defined as an employee before they can be set up as a user on the system. This step is performed using Oracle Human Resource Management Systems (if installed) otherwise, it is accomplished through CRM Resource Manager.

Note: If you have a full Oracle HRMS license, you will be able to create employees using Oracle HRMS. If you have a shared Oracle HRMS license or if Oracle HRMS is not installed, you will need to use CRM Resource Manager. The navigation paths will vary depending on whether you have a full license or a shared license. If you have the full installation of Oracle Human Resources, which is a module of Oracle HRMS, you will perform this step using HRMS Manager responsibility. See *Managing People Using Oracle HRMS Release 11I* for additional information.

Login

Oracle Forms Applications

Responsibility

HRMS Manager

Prerequisites

- Administrative user must be created.

Steps

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

The Find Person window appears.

2. Click **New**.

The People window appears.

3. Enter the appropriate information for the employee.

Note: The Last (Name), Gender, and Type fields are required. Other fields may be required depending on how Oracle Human Resource Management Systems is set up for your enterprise. Make sure that you select "Employee" as the type in the Type field. If the Employee (Number) field is unavailable for selection, then Oracle HRMS is set to automatically generate the employee number when the employee record is saved. If you leave the fields such as SSN and DOB blank, when you save the record, a message indicating the consequences of leaving the fields blank will display.

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

See Also

- [Section 4.2, "Creating an Interaction Center Agent"](#)
- [Section 4.4, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.5, "Setting Up Employees as Users"](#)
- [Section 4.6, "Importing a Resource"](#)
- *Managing People Using Oracle HRMS Release 11I*

4.4 Creating an Employee in CRM Resource Manager

Use this procedure to create an employee when you have a shared Oracle HRMS License or if Oracle HRMS is not installed. This procedure populates the same

database tables as the **Enter and Maintain** procedure in Oracle Human Resource Management Systems.

Note: If you have the full installation of Oracle HRMS license you will not be able to create employees using CRM Resource Manager and will receive an error message indicating that you must use Oracle HRMS.

Login

Oracle Forms Applications

Responsibility

CRM Resource Manager

Prerequisites

None

Steps

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

The Find Person window appears.

2. Click **New**.

The People window appears.

3. Enter the appropriate information for the employee.

Note: The Last (Name), Gender, and Category fields are required. Other fields may be required depending on how Oracle Human Resource Management Systems is set up for your enterprise. Make sure that you select "Employee" as the type from the list of values in the Type field. If the Employee (Number) field is unavailable for selection, then Oracle HRMS is set to automatically generate the employee number when the employee record is saved. If fields such as SSN and DOB are left blank, when you attempt to save the record, a message will display describing the consequences of their incompleteness.

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

See Also

- [Section 4.2, "Creating an Interaction Center Agent"](#)
- [Section 4.3, "Creating an Employee"](#)
- [Section 4.5, "Setting Up Employees as Users"](#)
- [Section 4.6, "Importing a Resource"](#)

4.5 Setting Up Employees as Users

Use this procedure to create an Oracle Applications user for the employee. As discussed in Section 5.3, *Creating an Employee*, an employee must be defined before a user account can be established. When a user account is created, in addition to the username and password being set, responsibilities have to be assigned to the user. Some Oracle applications require the assignment of roles in addition to responsibilities. Although responsibilities have the same names as roles, they perform different functions. Responsibilities are a general feature of all Oracle Applications and control what features of the application a user can access. By contrast, the roles that are set up in CRM Resource Manager control what information a user view and modify.

Note: If you have the full installation of Oracle HRMS license you will not be able to create employees using CRM Resource Manager and will receive an error message indicating that you must use Oracle HRMS.

Login

Oracle Forms Applications

Responsibility

System Administrator

Prerequisites

None

Steps

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

The User window appears.

2. In the User Name field, enter a user name for the account. Use the following guidelines to define Oracle Applications usernames:
 - Alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
 - Character sets that are supported by your operating system.
3. In the Password field, enter a password for the user account. Use the following guidelines for creating passwords for user accounts.
 - Minimum of 5 characters.
 - Maximum of 100 characters.
 - Alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
4. Press **Tab**.

You will return to the Password field. You will need to reenter the password for validation purposes. Once you reenter the password, press Tab again.

5. In the Person field, select the employee to be associated with the username and password.
6. In the Responsibilities tab, assign one or more responsibilities to the user. Oracle Oracle Interaction Blending ships with one responsibility:
 - Interaction Blending Administrator

Note: Once the user record has been saved, you cannot delete an assigned responsibility. Oracle Applications maintains audit data for assigned responsibilities. To deactivate an assigned responsibility, set the effective end date in the Effective Dates - To field for the assigned responsibility to the current date. To activate an assigned responsibility, clear or reset the effective end date.

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

See Also

- [Section 4.2, "Creating an Interaction Center Agent"](#)
- [Section 4.3, "Creating an Employee"](#)
- [Section 4.4, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.6, "Importing a Resource"](#)
- *Oracle Applications Systems Administrator's Guide*

4.6 Importing a Resource

Use this procedure to import an employee as a resource.

Login

Oracle Forms Applications

Responsibility

CRM Resource Manager

Prerequisites

- You must first set up the employee in Oracle HRMS or CRM Resource Manager. Review *CRM Foundation Concepts and Procedures*.

Steps

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

The Selection Criterion window appears.

2. In the **Resource Category** field, select **Employee**.
3. In the **Name** field, select the name of the employee you wish to import as a resource.

If you are importing a single employee, select the employee from the list of values. For groups of employees, search by job title, competency, or other search criteria.

4. Click **Search**.

The employee(s) that match your search criteria will appear in the Search Results area. The Select box for those employees that meet the search criteria will automatically be selected.

5. Deselect the boxes for the employees that you do not want imported as a resource.

6. Click **Create Resource**.

The Default Values window appears.

7. Click **OK**.

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

8. Click **Save Resource**.

9. Click **Details**.

10. Click the Roles tab.

11. In the Roles Type field, select **Call Center**.

12. In the Role field, enter **Call Center Agent**.

13. Select the Interaction Center tab.

14. In the Interaction Center field, select the appropriate server group.

15. Enter the telephony parameters.

The parameters that you enter will depend on which telephony parameters are required for the CTI middleware you are using.

16. Click **Save**.

See Also

- [Section 4.2, "Creating an Interaction Center Agent"](#)
- [Section 4.3, "Creating an Employee"](#)
- [Section 4.4, "Creating an Employee in CRM Resource Manager"](#)
- [Section 4.5, "Setting Up Employees as Users"](#)

4.7 Setting Profile Options

Profile options are parameters that control and affect the way an application functions. The procedure for setting up and changing profile options is the same for all Oracle Applications.

Note: A profile option may be set at more than one level. When a profile option is defined at multiple levels, the value entered at the Site level is assigned the lowest priority. The value entered at the Site level is superseded by any value entered at the Application level. A value entered at the Responsibility level will supersede both the Application and Site levels. The User level is given the highest priority in the hierarchy, overriding all values entered at other levels.

Use this procedure to set profile options for Oracle Interaction Blending.

Login

Oracle Forms Applications

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*
- Review [Appendix A](#) for a list of the profile options for Oracle Interaction Blending.

Steps

1. In the Navigator window, on the Functions tab, choose **Profile > System**.
The Find System Profile Values window appears.

Note: The Site and Profiles with No Values boxes are preselected by default.

2. Select the level(s) for which you want to set the profile option. The available levels are as follows:
 - **Site**

This level allows you to view or set profile options for all users.
 - **Application**

This level allows you to choose the application for which you will set the profile option. Select the application from the list.
 - **Responsibility**

This level allows you to choose the responsibility for which you will set the profile option. Select the application from the list.
 - **User**

This level allows you to select the user for which you will set the profile option. Select the application from the list.
3. In the Profile field, enter the profile name (e.g., IEU: Blending Style) or perform a lookup by entering the application prefix along with the percent symbol. For example, to locate Oracle Interaction Blending profiles, you would enter "IEU: B%".

Note: To display profile options both with and without values, select the **Profiles with No Values** box.

4. Click **Find**.

The profiles are displayed in the System Profile Values window.
5. Set the values for the Interaction Blending profile options.

The Interaction Blending profile options are as follows:

 - IEU: Blending Style
 - IEU: Blending Timeout
6. From the **File** menu, choose **Save**.

See Also

- [Appendix A](#)

4.8 Creating Interaction Blending Server Groups and Server Processes

Interaction Blending server groups and server processes are created in Interaction Center Server Manager (ICSM) from the ICSM tab. Server groups can be created for single or multi-site interaction centers. The Oracle Interaction Blending server receives media tasks and maps them to service categories. It evaluates service category statistics, agent transaction statistics, the levels of service, and the ability of the agent to handle a specific media task. If needed, it moves agents among the service categories to maintain the desired levels of service.

Use the Call Center HTML Administrator responsibility. See *Oracle Interaction Center Implementation Guide*.

See Also

- Oracle Advanced Inbound Implementation Guide

4.9 Creating Service Plans

A service plan defines a set of service requirements for a service category. Service requirements, or levels of services are used to measure the responsiveness of the interaction center to the customer.

Service plans are global and are shared among the Oracle Interaction Blending servers, and are associated with service categories. Service plans govern inbound or outbound media and their parameters depend on the media type.

A service plan contains at least seven regular segments, one for each day in the week. You can also set up service objectives for a specific date (a specific segment). If both a regular segment and a specific segment apply to the same day, then the specific segment is used.

Inbound service plans measure the percentage of media tasks to be handled within a time threshold (for example, 80 percent of the inbound calls to be answered within 60 seconds). Outbound service plans are measured by the number of transactions to be handled within a time period (for example, 200 transactions).

By default, service objectives are set from 00:00 to 23:59 (server local time). However, any segment can be subdivided into multiple time intervals (for example, 00:00 to 08:59, 09:00 to 16:59, and 17:00 to 23:50), each with different service objectives. The segments will be repeatedly used until they are updated, divided or merged.

Oracle Interaction Blending server attempts to map interactions to a service category. If the service category cannot be determined, then a media task is

associated with the default service category for the direction (inbound or outbound) and media type. You should set up service plans for both default and custom service categories.

Use this procedure to create a service plan.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

- None

Steps

1. Click the Service Plan tab.
The Service Plans page appears.
2. Click **Create**.
The General page appears.
3. Enter the details about the service plan.
 - a. In the Service Plan field, type the name of the service plan.
You cannot change this field after the service plan is saved.
 - b. Optionally, in the Description field, type a description of the service category.
 - c. From the Direction list, select the direction of the media.
You cannot modify this field after the service plan is saved.
4. Click **Done**.
The Plan Segments page appears.

Note: Each new service plan is created with a default segment for each day of the week. You can modify or delete the default segment. You can also add a new segment.

5. If you want to add a repeatable plan segment, then from the Day/Date list, select a day.
6. If you want to add a specific plan segment, then select a date and then click **Add**.

The date is added to the Day/Date list.

7. Enter the details about the plan segment.
 - If you want to add a new segment row, type the segment details in a blank row and then click **Update**.
 - If you want to clear a new segment row, then click the **Clear** button in the Remove column.
 - If you want to modify an existing segment, type the segment information in an existing row and then click **Update**.
 - If you want to delete an existing segment, select the box in the Remove column and click **Update**.

The Service Plans page appears.

See Also

- [Section 4.8, "Creating Interaction Blending Server Groups and Server Processes"](#)
- [Section 4.10, "Creating a Service Category"](#)
- [Section 4.12, "Defining Routing and Classifications"](#)
- [Section 4.13, "Administering Oracle Interaction Blending"](#)

4.10 Creating a Service Category

The service category is what Oracle Interaction Blending uses to make blending decisions. A service category represents a subset of media tasks with similar characteristics (for example, inbound customer service telephone calls). The composition of service categories reflects a working model of the interaction center.

Service categories are always associated with an Oracle Interaction Blending server. The Oracle Interaction Blending server maps media tasks to service categories.

Service categories govern inbound and outbound media, and their parameters depend on their direction. Inbound media tasks are mapped to service categories based on media type and classification. Outbound media tasks are mapped to

service categories based on media type and campaign. Service categories group media tasks, collect statistics, and measure levels of service.

Note: Server categories are created in the Blending Server tab in ICSM. The path is as follows: Blending Server tab > Server Group > Blending Server > Create Service Category.

Use this procedure to create a custom service category.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

- Create an interaction center server group.
- Add an interaction blending server to the server group.
- Optionally, create a custom service plan.

Steps

1. Click the Blending Server tab.
The Blending Servers page appears.
2. In the Server Name column, click a server name.
The Blending Server Details page appears.
3. Click **Create**.
The Create Service Category page appears.
4. Enter general information about the service category.
 - a. In the Service Category field, type the name of the service category.
You cannot change this field after the service category is saved.
 - b. If you want to use the service category immediately, then select the Active box.

- c. Optionally, in the Description field, type a description of the service category.
- d. From the Parent Category list, select the media type.
You cannot change this field after the service category is saved.
- e. Click **Continue**.
If the parent category is an inbound media type, then the Classification page appears. If the parent category is an outbound media type, then the Campaign Schedule page appears.
5. For an inbound service category, select one or more media classifications to associate with the service category.
6. For an outbound service category, select an Advanced Outbound campaign schedule to associate with the service category.
7. Click **Continue**.
The Service Plan page appears.
8. Select a service plan.
The details of the selected service plan appear in the Plan Segments section. Use the Day/Date list to view the segments for a specific day or date.
9. Click **Done**.
The Blending Server Details page appears.

See Also

- [Section 4.8, "Creating Interaction Blending Server Groups and Server Processes"](#)
- [Section 4.9, "Creating Service Plans"](#)
- [Section 4.12, "Defining Routing and Classifications"](#)
- [Section 4.13, "Administering Oracle Interaction Blending"](#)

4.11 Implementing a Single-Site Interaction Center

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

The Responsibility column indicates the Oracle Applications user account responsibility required to complete the step.

If you have defined an administrator for an Oracle interaction center, then that user has all of the responsibilities necessary to implement a single-site interaction center. See [Section 4.1, "Creating an Administrator for Oracle Interaction Blending"](#).

Number	Required?	Description	Responsibility
❑ Step 1	Required	Create a single-site interaction center. See: Section 4.11.1, "Creating a Single-Site Interaction Blending"	Call Center HTML Administration
❑ Step 2	Required	Implement Advanced Inbound. See: <i>Oracle Advanced Inbound Implementation Guide</i>	Not Applicable
❑ Step 3	Optional	Implement Advanced Outbound. See: <i>Oracle Advanced Outbound Implementation Guide</i>	Not Applicable
❑ Step 4	Required	Implement Universal Work Queue. See: <i>Oracle Universal Work Queue Implementation Guide</i>	Not Applicable

See Also

- [Section 4.1, "Creating an Administrator for Oracle Interaction Blending"](#)
- [Section 4.8, "Creating Interaction Blending Server Groups and Server Processes"](#)
- Oracle Interaction Center Implementation Guide

4.11.1 Creating a Single-Site Interaction Blending

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

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

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

- Install and configure an Interaction Center Server Manager node.

Steps

1. Select the ICSM tab.

2. Click **Server Groups**.

The Server Group List page appears.

3. Click **Create**.

The Server Group Details page appears.

4. Enter the details about the server group.

a. Enter a unique name for the server group.

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

This field is for informational purposes only.

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

This field is for informational purposes only.

d. Leave the Super Group field blank.

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

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

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

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

You have the following options:

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

5. Click **Submit.**

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

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

In the Server Group Details page, a list of server processes appears under the Servers section. For information about modifying the server group, see *Oracle Interaction Center Implementation Guide*.

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

4.12 Defining Routing and Classifications

Interaction center administration activities, including routing and call classification is administered from the Classification tab in Interaction Center Server Manager. Use the Call Center HTML Administration responsibility.

See Also

- [Section 4.12.1, "Classification Values"](#)
- [Section 4.12.2, "PL/SQL Functions"](#)
- [Section 4.12.3, "Classification Rules"](#)
- Oracle Interaction Center Implementation Guide
- Oracle Advanced Inbound Implementation Guide

4.12.1 Classification Values

Classification is the process by which incoming calls are assigned a specific string value for identification. The specific string value is called a "classification value". Classification values specify how incoming calls are identified and which Oracle business application should be used to launch the screen pop with the caller data. Oracle Interaction Blending uses classification values to determine the blending and routing of interactions. Classification values are also used by Oracle Universal Work Queue to identify telephony call queues and Oracle Interaction Center Intelligence uses them for reporting.

The assignment of classification values is accomplished in the Classification Values page and is accessed from the Classification tab in ICSM. Use Call Center HTML Administration responsibility.

Media Classifications

A media classification is a label (for example, Gold Support) that is assigned to an inbound media item. Classification rules define the conditions under which the classification is assigned. When the media item meets all of the conditions of the classification rules, then the classification is assigned to the media item.

The media classification engine, a component of the Routing server, is used to classify inbound media -- whether Oracle Telephony Manager is operating in active routing mode or passive routing mode. In active routing mode, Oracle Telephony

Manager routes inbound media by means of the Routing server. In passive mode routing mode, the ACD/PBX system completely handles the routing and queueing of inbound media.

Media classifications are used in Oracle Interaction Blending to determine which Oracle business application to launch when a media item is delivered. Media classifications are also used by Oracle Interaction Blending to map inbound media to service categories. In active routing mode, media classifications are used by the Routing server to determine when to reroute a media item.

See Also

- [Section 4.12.2, "PL/SQL Functions"](#)
- [Section 4.12.3, "Classification Rules"](#)
- Oracle Interaction Center Implementation Guide
- Oracle Advanced Inbound Implementation Guide

4.12.2 PL/SQL Functions

A classification value may also be derived dynamically from a PL/SQL function using the interaction data during the classification process. PL/SQL functions are defined in the PLSQL Functions page and must return any one of the classification values that are defined in the Classification Values page. If the PL/SQL function returns a value that is not in the Classification Values page, the call will be identified as "unclassified". The PL/SQL function may return the classification value in one of the following ways:

- A return value for the PL/SQL function
- An OUT parameter for the PL/SQL function

The PLSQL Functions page is accessed from the Classification tab in the ICSM. Use the Call Center HTML Administration responsibility.

- [Section 4.12.1, "Classification Values"](#)
- [Section 4.12.3, "Classification Rules"](#)
- Oracle Interaction Center Implementation Guide
- Oracle Advanced Inbound Implementation Guide

4.12.3 Classification Rules

Classification rules determine how a call gets classified and determine the classification value to be assigned to a call. A classification rule consists of the following process parameters:

- A time out value in seconds.
This value specifies the time after which the call will be rerouted if it has not been serviced by an agent.
- A set of conditions by which the classification rule is satisfied.
- A classification value to be assigned to the call if the set of conditions are satisfied;
or,
- A PL/SQL function from which the classification value must be derived, if the set of conditions are satisfied.
- An ability to add additional key-value pairs to the incoming call if the set of conditions are satisfied.
- An ability to assign the classification rule to specific media types.
- An ability to assign the classification rule to specific server groups.

The Classification Rules page is accessed from the Classification tab in the ICSM. Use Call Center HTML Administration responsibility.

See Also

- [Section 4.12.1, "Classification Values"](#)
- [Section 4.12.2, "PL/SQL Functions"](#)
- Oracle Interaction Center Implementation Guide
- Oracle Advanced Inbound Implementation Guide

4.13 Administering Oracle Interaction Blending

The Interaction Blending server maps interactions to service categories. Inbound interactions are mapped by classification. Outbound interactions are mapped by campaign. Interaction Blending server groups and server processes are maintained in Oracle Interaction Center Server Manager (ICSM). See *Oracle Interaction Center Implementation Guide*.

Topics include:

- Listing Interaction Blending Servers
- Listing Service Categories for an Interaction Blending Server
- Making a Service Category Active
- Modifying a Service Category
- Deleting a Service Category
- Listing Service Plans
- Listing the Service Categories Using a Plan
- Modifying a Service Category
- Deleting a Service Plan

Use the Blending Server tab to maintain service categories.

4.13.1 Listing Interaction Blending Servers

Use this procedure to list interaction blending servers.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

- Create an interaction server group.
- Add an Interaction Blending server to the server group.

Steps

1. Click the Blending Server tab.

The Blending Servers page appears. It lists the interaction blending servers and the server groups to which they belong.

See Also

- [Section 4.13.2, "Listing Service Categories for an Interaction Blending Server"](#)

- [Section 4.13.3, "Making a Service Category Active"](#)
- [Section 4.13.4, "Modifying a Service Category"](#)
- [Section 4.13.5, "Deleting a Service Category"](#)

4.13.2 Listing Service Categories for an Interaction Blending Server

Use this procedure to list the service categories for an interaction blending server.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

- Create an interaction server group.
- Add an Interaction Blending server to the server group.

Steps

1. Click the Blending Server tab.
The Blending Servers page appears.
2. In the Server Name column, click a server name.
The Blending Server Details page appears. It list the service categories associated with the blending server.

Note: There are several default service categories. They are marked by asterisks in the Remove and Active columns.

3. If you want to view the details of a service category, click a service category name.

See Also

- [Section 4.13.1, "Listing Interaction Blending Servers"](#)
- [Section 4.13.3, "Making a Service Category Active"](#)

- [Section 4.13.4, "Modifying a Service Category"](#)
- [Section 4.13.5, "Deleting a Service Category"](#)

4.13.3 Making a Service Category Active

Use this procedure to make an existing service category active.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

- Create an interaction center server group.
- Add an interaction blending server to the server group.
- Create a custom service category.

Steps

1. Click the Blending Server tab.
The Blending Servers page appears.
2. In the Server Name column, click a server name.
The Blending Server Details page appears.
3. Select the Active box for the service category that you want to use.
4. Click **Update**.
The Blending Server Details page refreshes.

See Also

- [Section 4.13.1, "Listing Interaction Blending Servers"](#)
- [Section 4.13.2, "Listing Service Categories for an Interaction Blending Server"](#)
- [Section 4.13.4, "Modifying a Service Category"](#)
- [Section 4.13.5, "Deleting a Service Category"](#)

4.13.4 Modifying a Service Category

Use this procedure to modify an interaction blending service category.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

- Create an interaction server group.
- Add an Interaction Blending server to the server group.

Steps

1. Click the Blending Server tab.
The Blending Servers page appears.
2. In the Server Name column, click a server name.
The Blending Server Details page appears.
3. Click a service category name.
The Service Category Details page appears. Use the side panel links to view additional service category information.

See Also

- [Section 4.13.1, "Listing Interaction Blending Servers"](#)
- [Section 4.13.2, "Listing Service Categories for an Interaction Blending Server"](#)
- [Section 4.13.3, "Making a Service Category Active"](#)
- [Section 4.13.5, "Deleting a Service Category"](#)

4.13.5 Deleting a Service Category

Use this procedure to remove an interaction blending service category from an interaction blending server.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

None

Steps

1. Click the Blending Server tab.

The Blending Servers page appears.

2. In the Server Name column, click a server name.

The Blending Server Details page appears.

3. Select the Remove box for the service category that you want to remove.

4. Click **Update**.

The service category is removed from the interaction blending server and the Blending Server Details page refreshes.

See Also

- [Section 4.13.1, "Listing Interaction Blending Servers"](#)
- [Section 4.13.2, "Listing Service Categories for an Interaction Blending Server"](#)
- [Section 4.13.3, "Making a Service Category Active"](#)
- [Section 4.13.4, "Modifying a Service Category"](#)

4.13.6 Listing Service Plans

Use this procedure to list all service plans.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

None

Steps

1. Click the Service Plan tab.

The Service Plans page appears.

Note: There are several default service plans. They are marked by asterisks in the Remove and Active columns. You cannot view the details on the default service plans from the Service Plan tab.

2. If you want to view the details of a custom service plan, click a service plan name.

See Also

- [Section 4.13.7, "Listing the Service Categories Using a Plan"](#)
- [Section 4.13.8, "Modifying a Service Category"](#)
- [Section 4.13.9, "Deleting a Service Plan"](#)

4.13.7 Listing the Service Categories Using a Plan

Use this procedure to list the service categories that use a specific service plan.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

None

Steps

1. Click the Service Plan tab.

The Service Plans page appears.

2. Click a service plan name.
The General page appears.
3. In the side panel, click Plan Segments.
The Plan Segments page appears. The service categories that use the selected service plan are listed at the bottom of the page.

See Also

- [Section 4.13.6, "Listing Service Plans"](#)
- [Section 4.13.8, "Modifying a Service Category"](#)
- [Section 4.13.9, "Deleting a Service Plan"](#)

4.13.8 Modifying a Service Category

Use this procedure to modify a service plan.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

None

Steps

1. Click the Service Plan tab.
The Service Plans page appears.
2. Click a service plan name.
The General page appears. Use the side panel links to view additional service plan information.

See Also

- [Section 4.13.6, "Listing Service Plans"](#)
- [Section 4.13.7, "Listing the Service Categories Using a Plan"](#)

- [Section 4.13.9, "Deleting a Service Plan"](#)

4.13.9 Deleting a Service Plan

Note: A service plan can only be deleted when it is not being used by a service category.

Use this procedure to remove an interaction blending service plan.

Login

Oracle HTML Applications

Responsibility

Interaction Blending Administrator

Prerequisites

Disassociate the service plan that you want to remove from any service categories.

Steps

1. Click the Service Plan tab.
The Service Plans page appears.
2. Select the Remove box for the service plan that you want to remove.
3. Click **Update**.
The service plan is removed from the interaction blending server and the Service Plans page refreshes.

See Also

- [Section 4.13.6, "Listing Service Plans"](#)
- [Section 4.13.7, "Listing the Service Categories Using a Plan"](#)
- [Section 4.13.8, "Modifying a Service Category"](#)

Integrating Interaction Blending with Other Oracle Applications

This chapter provides information regarding the integration of Oracle Interaction Blending with certain Oracle Applications.

Topics include:

- [Section 5.1, "Integrating with Oracle Universal Work Queue"](#)
- [Section 5.2, "Integrating Interaction Blending with Oracle Telephony Manager"](#)

5.1 Integrating with Oracle Universal Work Queue

Note: This procedure applies to the blending of media work. It is only required when implementing Oracle Interaction Blending. The responsibility of System Administrator is required to define profile options.

To enable media work blending, the IEU: Blending Style profile option must be set to Forced Blended. When media work blending is enabled for Oracle Interaction Blending, the Media node is replaced with a Blended node.

Oracle Interaction Blending must be installed and configured. Oracle Interaction Blending dynamically moves agents between queues and media types based on the service levels for the interaction center.

See Also

- [Oracle Universal Work Queue Implementation Guide](#)

5.2 Integrating Interaction Blending with Oracle Telephony Manager

Oracle Telephony Manager must be in active mode to implement blending. To enable active mode for Oracle Telephony Manager, set the value of the `PASSIVE_MODE` parameter for the Oracle Telephony Manager server to `FALSE`.

You must also set the `IB_SERVER_NAME` parameter for the Oracle Telephony Manager server to the name of the Oracle Interaction Blending server in the server group.

See Also

- Oracle Universal Telephony Manager Implementation Guide

Oracle Interaction Blending Profile Options

This appendix provides a listing of the system profile options used by Oracle Oracle Interaction Blending.

Topics include:

- [Appendix A.1, "Profile Values"](#)
- [Appendix A.2, "Setting System Profile Options"](#)
- [Appendix A.3, "Blending Profile Options"](#)

A.1 Profile Values

When an Oracle Applications user performs a login or changes responsibility, Oracle Applications establishes a value for each option in a user's profile.

The profile option description includes the following information:

- **Required:** Indicates whether the profile option must be set.
- **Personal Profile Values:** Indicates whether a user can view or update the profile option. Oracle Applications users with the Preferences responsibility may use the Personal Profile Values window to set their own personal profile options at the user level. Not all profile options are visible to users and some profile options, while visible, may not be updated by users.
- **System Profile Values:** Indicates the levels at which a particular profile option can be set. System administrators can set profile options at the site, application, responsibility, and user levels. Not all profile options have settings at all levels.
- **Settings:** Lists available values, a description of each value, and any usage considerations.

- **Default Value:** Indicates the default profile option value if no value has been set. Depending on the how the profile option is used in the application, the default may be a predefined value or it may be determined dynamically at runtime.

A.2 Setting System Profile Options

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

Use this procedure to set or change profile options.

Login

Oracle Forms

Responsibility

System Administrator

Prerequisites

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

Steps

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

The Find System Profile Values window appears.

Note: The Site and Profiles with No Values boxes are preselected by default.

2. Select the level(s) for which you want to set the profile option. The available levels are as follows:
 - **Site**
This level allows you to view or set profile options for all users.
 - **Application**
This level allows you to choose the application for which you will set the profile option. Select the application from the list.

- **Responsibility**

This level allows you to choose the responsibility for which you will set the profile option. Select the application from the list.

- **User**

This level allows you to select the user for which you will set the profile option. Select the application from the list.

3. In the Profile field, enter the profile name (e.g., IEU: Blending Style) or perform a lookup by entering the application prefix along with the percent symbol. For example, to locate Oracle Interaction Blending profiles, you would enter "IEU: B%".

Note: To display profile options both with and without values, select the **Profiles with No Values** box.

4. Click **Find**.

The profiles are displayed in the System Profile Values window.

5. Select a value from the list.

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

6. Verify or set the profile option(s) at the levels that you selected.
7. Click **Save**.

A.3 Blending Profile Options

Topics include:

- [Appendix A.3.1, "IEU: Blending Style"](#)
- [Appendix A.3.2, "IEU: Blending Timeout"](#)
- [Appendix A.3.3, "IEU: Queue Order: Blended"](#)

A.3.1 IEU: Blending Style

Note: This profile option applies to media work.

This Universal Work Queue profile option is used to enable the blending of media work. When an agent requests work from the Blended node, Oracle Interaction Blending will deliver the any of the media type for which an agent is enabled (e.g., inbound, web callbacks, or outbound), based on the service levels for the interaction center.

Note: Only simple blending is used for Advanced Inbound configurations in either passive or enhanced passive modes.

Required

No

Personal Profile Values

View?	No
-------	----

Update?	No
---------	----

System Profile Values

Site?	Yes
-------	-----

Application?	Yes
--------------	-----

Responsibility?	Yes
-----------------	-----

User?	Yes
-------	-----

Settings

Full Forced Blended	Media work blending is enabled. A Blended node appears in the Universal Work Queue window. The Media node, from which an agent can request media work of a <i>specific</i> type, is not available.
---------------------	--

Full Optional Blended	Media work blending is enabled. A Blended node appears in the Universal Work Queue window. The Media node, from which an agent can request media work of a <i>specific</i> type, is also available.
Not Blended	Media work blending is not enabled.
Simple Forced Blended	Provides the ability for passive blending. A single blending node will appear.
Simple Optional Blended	Provides the ability for enhanced-passive blending. All media nodes will appear.

A.3.2 IEU: Blending Timeout

Note: This profile option applies to media work.

In simple blending mode, blending occurs by first looking for an inbound record and then, if not found for an outbound record. The integer that is set in this profile determines the duration of time to look for inbound and outbound records.

Use this Universal Work Queue profile to set the timeout value for simple blending.

Required

No

Personal Profile Values

View?	No
Update?	No

System Profile Values

Site?	Yes
Application?	Yes
Responsibility?	Yes
User?	Yes

Settings

Enter a value in seconds to indicate the blending timeout threshold. For example, 60 to represent 60 seconds.

Default Value

No

A.3.3 IEU: Queue Order: Blended

This Universal Work Queue profile option is used to indicate the placement of the Blended node in the list of nodes on the Oracle Universal Work Queue window.

Note: The Blended node appears in the Oracle Universal Work Queue window when the IEU: Blending Style profile option value is set to Full Forced Blended or Full Optional Blended.

Required

No

Personal Profile Values

View?	Yes
Update?	Yes

System Profile Values

Site?	Yes
Application?	Yes
Responsibility?	Yes
User?	Yes

Settings

Choose a number to indicate the placement of the node in the list of nodes on the Oracle Interaction Blending window. Nodes are displayed in ascending order.

Default Value

Not applicable

