

# **Oracle® Customer Interaction History**

Implementation Guide

Release 11*i*

**Part No. B10643-01**

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Oracle Customer Interaction History Implementation Guide, Release 11i

Part No. B10643-01

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## **Oracle Customer Interaction History Implementation Guide, Release 11i**

### **Part No. B10643-01**

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

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Oracle Customer Interaction History Documentation  
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Reston, VA 20190  
USA

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# Preface

## Intended Audience

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

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

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

If you have never used Oracle Customer Interaction History, Oracle suggests you attend one or more of the Oracle Customer Interaction History 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 Customer Interaction History.

Chapter 1 describes the Interaction Center product family. It also describes what is new in the current release.

Chapter 2 provides a detailed description of Oracle Customer Interaction History.

Chapter 3 describes the system requirements and product dependencies for Oracle Customer Interaction History. It also describes how to access the administrative console for Oracle Customer Interaction History.

Chapter 4 provides a high-level overview of the implementation task sequence and references to procedures that are performed during the course of an implementation.

Chapter 5 describes task-based procedures for administering Oracle Customer Interaction History.

Chapter 6 describes task-based procedures for using Oracle Customer Interaction History.

Appendix A describes the concurrent programs for Oracle Customer Interaction History.

## 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/>.

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## 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 Customer Interaction History.

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 Customer Interaction History 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 Customer Interaction History.

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. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

## **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 Oracle Business Intelligence System (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 and the 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.

### **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 Oracle9i Forms Developer 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**

#### **Multiple Reporting Currencies in Oracle Applications**

This manual details additional steps and setup considerations for implementing the Multiple Reporting Currencies feature.

#### **Multiple Organizations in Oracle Applications**

This guide describes how to set up and use the Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Applications.

#### **Oracle Workflow Guide**

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

#### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information. This manual also provides information on creating custom reports on flexfields data.

## **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 Oracle*Metalink*.

## **Oracle Manufacturing APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

## **Oracle Order Management Suite APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

## **Oracle Common Application Components 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 Customer Interaction History 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 Customer Interaction History 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>).

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**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.

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# Introduction

Topics include:

- [Section 1.1, "Oracle Interaction Center Overview"](#)
- [Section 1.2, "New in this Release"](#)

## 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:

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 History](#)

**See Also**

- [Section 1.2, "New in this Release"](#)

### 1.1.1 Oracle Advanced Inbound

Oracle Advanced Inbound is designed to consistently and effectively handle customer interactions by intelligently routing, queuing and distributing media items. Oracle Advanced Inbound offers CTI support for market-leading traditional ACD/PBX and IP Telephony platforms, and provides enhanced screen pops on customer data into the Oracle e-Business suite application. Oracle Advanced Inbound is fully integrated with Oracle TeleSales, Oracle TeleService and Oracle Collections, thereby minimizing integration time and deployment costs. Oracle Advanced Inbound also provides the Oracle Telephony Adapter SDK, which can be used to integrate other PBX/ACD and CTI middleware combinations that are not supported by an Oracle telephony adapter.

Oracle Advanced Inbound is required to telephony enable business applications in the Oracle eBusiness Suite. "Telephony-enabled" means that the application can communicate with a telephone system for inbound calls, outbound calls, or both by way of the CTI middleware that handles the messaging between the customer's PBX/ACD and the business application.

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

**See Also**

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

- [Oracle Interaction History](#)

## 1.1.2 Oracle Advanced Outbound

Oracle Advanced Outbound is another key part of the Oracle eBusiness Suite of applications. It is the module of Oracle Interaction Center that addresses outbound telephony. Oracle Advanced Outbound 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 interaction center agents

Oracle Advanced Outbound integrates with and relies on Oracle Marketing Online to create campaigns and lists to execute. Oracle Advanced Outbound serves as the execution arm for these marketing lists to maximize both outbound list penetration and agent productivity. Oracle Advanced Outbound 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.

Oracle Advanced Outbound 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](#)
- [Oracle Interaction History](#)

## 1.1.3 Oracle eMail Center

Oracle eMail Center 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. Oracle eMail Center 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](#)
- [Oracle Interaction History](#)

## **1.1.4 Oracle Scripting**

Oracle Scripting is a set of tools to facilitate the process of gathering of information for the benefit of the enterprise. Oracle Scripting is composed of several components: the Script Author, the Scripting Engine, the Scripting Administration console, and the Survey Administration console.

The Script Author is the development tool with which customized business requirements are translated into miniature programs known as "scripts." Each implementation of Oracle Scripting employs at least one customized script built by Oracle Consulting, consulting partners, or the enterprise. There are various ways in which scripts can be employed to gather or distribute data for an enterprise. For example, a script can serve to unify an agent's desktop by integrating aspects of various applications, or as a survey questionnaire to solicit specific information from the sample or target population. The Script Author offers two ways to create a script, including graphical layout tools and a Script Wizard component.

The Scripting Engine is responsible for displaying the script to the end user, interpreting the end user's responses to questions and answers, and processing custom code developed in support of the script. The Scripting Engine includes two interfaces (one for agents, and one for executing a script using a Web browser). Any script executed in the Web interface requires survey campaign administration.

The Scripting Administration console provides the user interface with which script developers can launch the Script Author as a Java applet, and script administrators can administer Oracle Scripting files, as well as generate, view and analyze a panel footprint report.

The Survey Administration console provides the user interface with which survey administrators establish and maintain survey campaign information, define and manage survey deployments, and view responses from data received.

**See Also**

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

### 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 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 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](#)
- [Oracle Interaction History](#)

## 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, and easily customizable view of Interaction Center information. Data presented includes session information, agent productivity metrics and key performance indicators (e.g., speed to answer and abandon rate).

Oracle Interaction Center Intelligence is built on an Oracle proprietary Java-based technology stack (Oracle CRM Foundation, also known as JTT) and a three-tier architecture:

- The first tier consists of the front end (client) which presents the application through an Oracle Applications-compliant Web browser.
- The middle tier is comprised of the Apache Web server and application server, which included as part of the installation of Oracle Applications release 11i.
- The third tier represents the database, which is comprised of an Oracle 8i or 9i database.

### See Also

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

## 1.1.7 Oracle Interaction History

Oracle Interaction History provides a real-time repository for recording contact interactions and relevant business events between businesses and customers. Interaction History also provides a user interface for administrative set up and as well as for the viewing and querying of interactions and events.

### See Also

- [Oracle Advanced Inbound](#)

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

## 1.2 New in this Release

In this release, the concurrent program for purging interaction history data was enhanced. There are now more data selection options based on activities and media items.



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## Detailed Product Description

Topics include:

- [Section 2.1, "Oracle Customer Interaction History Overview"](#)
- [Section 2.2, "Concepts"](#)

### 2.1 Oracle Customer Interaction History Overview

Oracle Customer Interaction History provides applications with a common framework for capturing and accessing all "interaction" data associated with customer contacts. Oracle Customer Interaction History acts as a central repository and provides a consistent framework for tracking all automated or agent-based customer interactions.

Oracle Customer Interaction History tracks all customer-business interactions (also referred to as touch points) and serves as a repository for the resulting interaction data. Applications record touch points through the Oracle Customer Interaction History framework itself, or through other applications that use Oracle Customer Interaction History. This information can be accessed by using the Oracle Customer Interaction History user interface, by using the user interface of an application that is integrated with Oracle Customer Interaction History, or by calling the Oracle Customer Interaction History APIs.

Within Oracle Customer Interaction History, you can view customer-agent interactions, activities and notes. Interactions can be filtered by customer, agent, campaign, date range, and account number. Activities can be filtered by customer, agent, activity type, media type, and date range. Notes that exist for customer-agent interactions and activities are available for viewing in Oracle Customer Interaction History.

## 2.2 Concepts

Topics include:

- [Section 2.2.1, "Interaction"](#)
- [Section 2.2.2, "Outcome"](#)
- [Section 2.2.3, "Result"](#)
- [Section 2.2.4, "Reason"](#)
- [Section 2.2.5, "Activity Type"](#)
- [Section 2.2.6, "Action"](#)
- [Section 2.2.7, "Wrap Up"](#)

### 2.2.1 Interaction

An interaction is a point of contact or touchpoint between a human or automated agent and a party such as a customer, a customer system, or a potential customer. An example of a touchpoint is a phone call between an agent and a customer. Interactions include activities, media, and media items.

An interaction is a timed entity with an outcome and a result that can be tracked. When an interaction is closed, it becomes an historical record that subsequently cannot be altered or modified. Multiple forms of communication or media items between the party and the agent can be included in a single interaction.

#### **Example**

An interaction is a customer call into an agent requesting a quote on a printer. The activities include the agent obtaining a quote and sending a fax. Therefore, there are multiple activities for a single interaction.

The interaction activities are:

- Calling the agent
- The agent obtaining a quote
- The agent sending a fax

For the first activity, the media is the telephone, and the media item is the telephone call. For the second activity, the media is the fax machine, and the media item is the actual fax.

## 2.2.2 Outcome

An outcome describes the outcome of a customer interaction (for example, making contact with the customer or reaching an answering machine). An outcome can be assigned manually by the agent or automatically by the application.

You can require the assignment of a result when a particular outcome is assigned to an interaction. In addition, the assignment of an outcome can generate a callback so that an agent calls the customer back at another time.

## 2.2.3 Result

A result describes the consequence of an outcome. Using a wrap up, you can relate an outcome to one or more results (for example, a outcome of "contact" with a result of "no sale"). Also, you can require the assignment of a reason when a particular result is assigned to an interaction.

## 2.2.4 Reason

A reason provides an explanation for the result. Using a wrap up, you can relate a result to one or more reasons (for example, a contact outcome with a result of "no sale" and a reason of "no money").

## 2.2.5 Activity Type

An activity type is a classification of actions that take place during a customer interaction (for example, e-mail or a phone call). You can associate an activity type with one or more actions.

## 2.2.6 Action

An action is a specific action that takes place during a media-based customer interaction (for example, replying to an e-mail or transferring a phone call). You can associate an action with the activity type.

## 2.2.7 Wrap Up

A wrap up relates outcomes to results and reasons. You can limit the availability of a wrap up to a specific campaign type or code. When the wrap up is selected for an interaction, the outcome, result, and reason in the wrap up definition are assigned to the interaction.



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## Before You Begin

This chapter describes the system requirements and product dependencies for Oracle Customer Interaction History. It also describes how to access the administrative console for Oracle Customer Interaction History.

Topics include:

- [Section 3.1, "Mandatory Dependencies"](#)
- [Section 3.2, "Related Documentation"](#)
- [Section 3.3, "Installing Oracle Customer Interaction History"](#)
- [Section 3.4, "Accessing Oracle Customer Interaction History"](#)

### 3.1 Mandatory Dependencies

Mandatory dependencies are required in order for Oracle Customer Interaction History to function. Oracle Customer Interaction History relies on several products for data and functionality. The following products must be installed and implemented before you begin the implementation of Oracle Customer Interaction History:

- [Oracle Common Application Components](#)
- [Oracle Marketing](#)

#### **Oracle Common Application Components**

Resource Manager, Task Manager, and Notes are required for Oracle Customer Interaction History to function.

For information about Oracle Common Application Components, see *Oracle Common Application Components Implementation Guide* and *Oracle Common Application Components User Guide*.

### **Oracle Marketing**

Oracle Customer Interaction History depends on the Oracle Marketing schema.

For information about Oracle Marketing, see *Oracle Marketing Implementation Guide* and *Oracle Marketing User Guide*.

## **3.2 Related Documentation**

The latest product documentation is available on *OracleMetaLink* at <http://metalink.oracle.com>.

## **3.3 Installing Oracle Customer Interaction History**

You have the following options for installing Oracle Customer Interaction History:

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**Note:** Prior to installation or upgrade, *always* review the readme and patch list for the Oracle Interaction Center Family Pack. The readme contains installation instructions, a summary of product changes, and a list of known issues for a family pack. The patch list contains a list of patches that are required or recommended for use with a family pack. The readme and patch list for the Oracle Interaction Center Family Pack are available on *OracleMetaLink* at <http://metalink.oracle.com>. (Perform an advanced search for Document ID 219238.1. Enter the document ID in the Search Field and select the Doc ID option.)

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- **Oracle Applications Rapid Install**

The Rapid Install is intended for customers who are installing Oracle Applications for the first time or upgrading to Release 11i from to Release 11.0 or Release 10.7. It contains the family packs or product minipacks for all products in Oracle Applications.

The Rapid Install is provided on CD-ROMs and is available from Oracle Store at <http://oraclestore.oracle.com>. For information about installing Oracle Applications using Rapid Install, see *Installing Oracle Applications*. For

information about upgrading Oracle Applications using Rapid Install, see *Upgrading Oracle Applications*.

- Oracle Applications Maintenance Pack

The Maintenance Pack is intended for customers who have already installed Oracle Applications Release 11i. It contains the family packs or product minipacks for all products in Oracle Applications.

The Maintenance Pack is provided as a patch and is available on Oracle*MetaLink* at <http://metalink.oracle.com>. For information about upgrading Oracle Applications Release 11i using the Maintenance Pack, see Maintenance Pack Release Instructions on Oracle*MetaLink* at <http://metalink.oracle.com>. (Perform an advanced search for Document ID 232834.1. Enter the document ID in the Search Field and select the Doc ID option.)

- Oracle Interaction Center Family Pack

The Oracle Interaction Center Family Pack are intended for customers who have already installed or upgraded to Oracle Applications Release 11i and wish to upgrade only Oracle Interaction Center. The family pack is cumulative and contains only the minipacks for products in the Oracle Interaction Center family.

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**Note:** Oracle Interaction Center products integrate with other products in Oracle Applications. Therefore, you may have to install family packs, product minipacks, or individual product patches for *other* products before installing the Oracle Interaction Center Family Pack.

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The Oracle Interaction Center Family Pack is provided as a patch and is available on Oracle*MetaLink* at <http://metalink.oracle.com>. The readme and patch list for the Oracle Interaction Center Family Pack are available on Oracle*MetaLink* at <http://metalink.oracle.com>. (Perform an advanced search for Document ID 232834.1. Enter the document ID in the Search Field and select the Doc ID option.)

## 3.4 Accessing Oracle Customer Interaction History

Oracle Applications uses two different technology stacks:

- Oracle Application Object Library (AOL)

- Java Technology Foundation (JTF)

AOL applications are Oracle Forms developed using Oracle Developer and are usually referred to as Forms-based application. JTF applications are Java Server Pages (JSPs) developed using Oracle JDeveloper and are usually referred to as HTML-based applications. Each type of application accesses the same database and can share information with the other.

The product interfaces are accessed by providing the Uniform Resource Locator (URL) for the environment in an Oracle Applications 11i-compliant Web browser and navigating to the hyperlink for the login page for the specific technology stack. You can also provide the URL for the specific login page. This URL is referred to as your login URL.

**Oracle Applications URL** Use this URL to navigate to the Personal Home Page URL or the CRM Home page URL.

`http://<host>:<port>/`

- To navigate to the Personal Home Page URL, choose **Apps Logon Links > Personal Home Page**.
- To navigate to the CRM Home Page URL, choose **Apps Logon Links > CRM Home Page**.

**CRM Home Page URL** This URL is sometimes referred to as the Apache or JTF login URL. Use this URL to open the login page for HTML-based applications.

`http://<host>:<port>/OA_HTML/jtfllogin.jsp`

**Personal Home Page URL:** This URL is sometimes referred to as the Self-Service Web Applications or SSWA login URL. Use this URL to open the login window for Oracle Applications via the Personal Home Page. You can access Forms-based or HTML-based applications from the Personal Home Page.

`http://<host>:<port>/OA_HTML/US/ICXINDEX.htm`

**Forms URL** Use this URL to open the login page for Forms-based applications. This login URL is typically used by system administrators, not end users.

`http://<host>:<port>/dev60cgi/f60cgi`

### 3.4.1 User Accounts

An application user is an authorized user of Oracle Applications and is uniquely identified by a username. After the user account has been defined, the application user can sign on to Oracle Applications at the CRM Home Page, Personal Home Page, or Forms login.

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**Note:** Oracle Applications is installed with a system defined username and password.

- Username: sysadmin
  - Password: sysadmin
- 
- 

An application user enters a username along with a password to sign on to Oracle Applications. The password assigned by the system administrator is temporary. When signing on for the first time, the application user will be prompted to change the password. Access to specific functionality and data will be determined by the responsibilities assigned to your user account.

### 3.4.2 Responsibilities

A system administrator assigns one or more responsibilities to an application user. A responsibility is a level of authority that allows a user to access specific functionality and data in Oracle Applications. Oracle Applications is installed with predefined responsibilities. A system administrator can modify a predefined responsibility or create custom responsibilities.

The following table describes the predefined responsibilities that are used to implement Oracle Customer Interaction History.

Responsibility	Function	Interface
Interaction History Data Import	Run a concurrent program to import interaction data into Oracle applications	Forms
Interaction History Data Purge	Run a concurrent program to purge interaction data from Oracle Applications.	Forms
Interaction History JSP Administrator	Create outcomes, results, reasons, activities, actions, and wrap ups. Associate actions and activities.	HTML

<b>Responsibility</b>	<b>Function</b>	<b>Interface</b>
Interaction History JSP User	View interactions and activities. Search for interactions and activities.	HTML
System Administrator	Create a user for administering Oracle Customer Interaction History. Set values for profile options.	Forms

In the Forms interface, if an application user has only one responsibility, then the related menu or application (if there is only one function in the menu) appears after the user signs on. If an application user has more than one responsibility, then a list of available responsibilities appears after the user signs on. To switch responsibilities, choose Switch Responsibility from the File menu.

In the HTML interface, an application user must select a default responsibility (even if the user has only one responsibility). The next time the application user signs on, the tabs related to the default responsibility appear. To switch responsibilities, go to Navigation Preferences in your profile (Profile icon). In the Switch Responsibilities section, select another responsibility from the Current Responsibility list.

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## Implementation Tasks

There are a number of procedures which must be completed in order to implement Oracle Customer Interaction History. This chapter provides a high-level overview of the implementation task sequence and references to procedures that are performed during the course of an implementation.

Topics include:

- [Section 4.1, "Implementation Task Sequence"](#)
- [Section 4.2, "Defining an Administrator"](#)

### 4.1 Implementation Task Sequence

Perform the steps in the following table to implement Oracle Customer Interaction History. 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.

Step	Required	Description	Responsibility
1	Yes	<p><b>Create an Oracle Customer Interaction History administrator.</b></p> <p>You will use this user account to perform the remaining steps.</p> <p>See: <a href="#">Section 4.2, "Defining an Administrator"</a></p>	System Administrator
2	No	<p><b>Define interaction outcomes.</b></p> <p>See: <a href="#">Section 5.1, "Outcome"</a></p>	Interaction History JSP Administrator

<b>Step</b>	<b>Required</b>	<b>Description</b>	<b>Responsibility</b>
3	No	<b>Define interaction results.</b> See: <a href="#">Section 5.2, "Result"</a>	Interaction History JSP Administrator
4	No	<b>Define interaction reason codes.</b> See: <a href="#">Section 5.3, "Reason"</a>	Interaction History JSP Administrator
5	No	<b>Define interaction activity types.</b> See: <a href="#">Section 5.6, "Activity Type"</a>	Interaction History JSP Administrator
6	No	<b>Define interaction actions.</b> See: <a href="#">Section 5.7, "Action"</a>	Interaction History JSP Administrator
7	No	<b>Define interaction wrap ups.</b> See: <a href="#">Section 5.8, "Wrap Up"</a>	Interaction History JSP Administrator
8	No	<b>Associate an action with an activity type.</b> See: <a href="#">Section 5.9, "Action-Activity Type"</a>	Interaction History JSP Administrator

### See Also

- [Section 4.2, "Defining an Administrator"](#)

## 4.2 Defining an Administrator

Use the following procedure to create a user account for administering Oracle Customer Interaction History.

### Login

Self-Service Login URL

### Responsibility

System Administrator

### Prerequisites

None

### Steps

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

The User window appears.

Use the following guidelines to define Oracle Applications user names:

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

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

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

Use the following guidelines to define Oracle Applications passwords:

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

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

The cursor remains in the Password field.

4. Enter the password again to verify it.
5. If you want to use this account to submit concurrent programs for Oracle Customer Interaction History, then select an employee to associate with this user account from the Person field.
6. In the Responsibilities tab, add the following responsibilities:

<b>Responsibility</b>	<b>Function</b>	<b>Interface</b>
Interaction History Data Import	Run a concurrent program to import interaction data into Oracle applications	Forms
Interaction History Data Purge	Run a concurrent program to purge interaction data from Oracle Applications.	Forms
Interaction History JSP Administrator	Create outcomes, results, reasons, activities, actions, and wrap ups. Associate actions and activities.	HTML
Interaction History JSP User	View interactions and activities. Search for interactions and activities.	HTML

<b>Responsibility</b>	<b>Function</b>	<b>Interface</b>
System Administrator	Create a user for administering Oracle Customer Interaction History. Set values for profile options.	Forms

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

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

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

You may close the Users window.

#### **See Also**

- [Section 4.1, "Implementation Task Sequence"](#)

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# Administration Tasks

This chapter describes task-based procedures for administering Oracle Customer Interaction History. Topics include:

- [Section 5.1, "Outcome"](#)
- [Section 5.2, "Result"](#)
- [Section 5.3, "Reason"](#)
- [Section 5.4, "Outcome-Result"](#)
- [Section 5.5, "Result-Reason"](#)
- [Section 5.6, "Activity Type"](#)
- [Section 5.7, "Action"](#)
- [Section 5.8, "Wrap Up"](#)
- [Section 5.9, "Action-Activity Type"](#)

## 5.1 Outcome

Use the Outcome hyperlink to maintain a list of interaction outcomes.

### Tasks

You can perform the following tasks:

- [Section 5.1.1, "Creating an Outcome"](#)
- [Section 5.1.2, "Updating an Outcome"](#)
- [Section 5.1.3, "Removing an Outcome"](#)

## 5.1.1 Creating an Outcome

Use this procedure to define an outcome.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Outcome**.  
The Outcomes page appears.
3. Click **Create**.  
The Create Outcome window opens.
4. In the Code field, type a code for the outcome.  
You cannot change this field after the outcome is saved.
5. In the Short Description field, type a short description of the outcome.  
The short description appears in the list of outcomes.
6. Optionally, in the Long Description field, type a more detailed description of the outcome.  
This field is for informational purposes only.
7. If you want to indicate that the outcome is positive, then select the **Positive Outcome** box.
8. If you want to require a result with this outcome, then select the **Result Required** box.
9. If you want to indicate that the outcome is related to a phone call, then select the **Telephony Related** box.

10. In the Generate Callback field, select the type of callback that you want the outcome to generate.

You have the following options:

- Private: Generate a callback that must be made by the original agent.
- Public: Generate a callback that can be made by any agent.
- None: Do not generate a callback.

11. In the Success field, indicate whether the outcome is a successful outcome.

You cannot change this field after the server is saved.

12. If you want to use the outcome immediately, then select the **Active** box.

13. Click **Create**.

### See Also

- [Section 5.1.2, "Updating an Outcome"](#)
- [Section 5.1.3, "Removing an Outcome"](#)

## 5.1.2 Updating an Outcome

Use this procedure to update an outcome.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Outcome**.  
The Outcomes page appears.
3. Click an ID hyperlink.

The Edit Outcome page appears.

4. In the Short Description field, enter a short description of the outcome.  
The short description appears in the list of outcomes.
5. Optionally, in the Long Description field, enter a more detailed description of the outcome.  
This field is for informational purposes only.
6. If you want to indicate that the outcome is positive, then select the **Positive Outcome** box.
7. If you want to require a result with this outcome, then select the **Result Required** box.
8. In the Generate Callback field, select the type of callback that you want the outcome to generate.  
You have the following options:
  - Private: Generate a callback that must be made by the original agent.
  - Public: Generate a callback that can be made by any agent.
  - None: Do not generate a callback.
9. If you want to indicate that the outcome is related to a phone call, then select the **Telephony Recycling Code** box.
10. If you want to use the outcome immediately, then select the **Active** box.
11. Click **Update**.

**See Also**

- [Section 5.1.1, "Creating an Outcome"](#)
- [Section 5.1.3, "Removing an Outcome"](#)

### 5.1.3 Removing an Outcome

Use this procedure to delete a user-defined outcome. You cannot delete seeded outcomes.

**Login**

HTML Login URL

## Responsibility

Interaction History JSP Administrator

## Prerequisites

None

## Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Outcome**.  
The Outcomes page appears.
3. Select the **Select** box for the outcome that you want to delete.  
You cannot delete seeded outcomes.
4. Click **Delete**.  
The selected outcome is removed from the list and the Outcomes page refreshes.

## See Also

- [Section 5.1.1, "Creating an Outcome"](#)
- [Section 5.1.2, "Updating an Outcome"](#)

## 5.2 Result

Use the Result hyperlink to maintain a list of results.

### Tasks

You can perform the following tasks:

- [Section 5.2.1, "Creating a Result"](#)
- [Section 5.2.2, "Updating a Result"](#)
- [Section 5.2.3, "Removing a Result"](#)

### 5.2.1 Creating a Result

Use this procedure to define a result.

## Login

HTML Login URL

## Responsibility

Interaction History JSP Administrator

## Prerequisites

None

## Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Result**.  
The Results page appears.
3. Click **Create**.  
The Create Result window opens.
4. In the Code field, type a code for the result.  
You cannot change this field after the result is saved.
5. In the Short Description field, enter a short description of the result.  
The short description appears in the list of results.
6. Optionally, in the Long Description field, enter a more detailed description of the result.  
This field is for informational purposes only.
7. If you want to indicate that the result is positive, then select the **Positive Result** box.
8. If you want to require a reason with this result, then select the **Result Required** box.
9. If you want to use the result immediately, then select the **Active** box.
10. Click **Create**.

## See Also

- [Section 5.2.2, "Updating a Result"](#)
- [Section 5.2.3, "Removing a Result"](#)

## 5.2.2 Updating a Result

Use this procedure to update a result.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Result**.  
The Results page appears.
3. Click an ID hyperlink.  
The Edit Result page appears.
4. In the Short Description field, enter a short description of the result.  
The short description appears in the list of results.
5. Optionally, in the Long Description field, enter a more detailed description of the result.  
This field is for informational purposes only.
6. If you want to indicate that the result is positive, then select the **Positive Result** box.
7. If you want to require a reason with this result, then select the **Result Required** box.
8. If you want to use the result immediately, then select the **Active** box.
9. Click **Update**.

### See Also

- [Section 5.2.1, "Creating a Result"](#)

- [Section 5.2.3, "Removing a Result"](#)

## 5.2.3 Removing a Result

Use this procedure to delete a user-defined result. You cannot delete seeded results.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Result**.  
The Results page appears.
3. Select the **Select** box for the result that you want to delete.  
You cannot delete seeded results.
4. Click **Delete**.  
The selected result is removed from the list and the Results page refreshes.

### See Also

- [Section 5.2.1, "Creating a Result"](#)
- [Section 5.2.2, "Updating a Result"](#)

## 5.3 Reason

Use the Reason hyperlink to maintain a list of reasons.

### Tasks

You can perform the following tasks:

- [Section 5.3.1, "Creating a Reason"](#)
- [Section 5.3.2, "Updating a Reason"](#)
- [Section 5.3.3, "Removing a Reason"](#)

## 5.3.1 Creating a Reason

Use this procedure to define a reason.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Reason**.  
The Reasons page appears.
3. Click **Create**.  
The Create Reason window opens.
4. In the Code field, type a code for the reason.  
You cannot change this field after the reason is saved.
5. In the Short Description field, enter a short description of the reason.  
The short description appears in the list of reasons.
6. Optionally, in the Long Description field, enter a more detailed description of the reason.  
This field is for informational purposes only.
7. If you want to use the reason immediately, then select the **Active** box.
8. Click **Create**.

### See Also

- [Section 5.3.2, "Updating a Reason"](#)
- [Section 5.3.3, "Removing a Reason"](#)

## 5.3.2 Updating a Reason

Use this procedure to update a reason.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Reason**.  
The Reasons page appears.
3. Click an ID hyperlink.  
The Edit Reason page appears.
4. In the Short Description field, enter a short description of the reason.  
The short description appears in the list of reasons.
5. Optionally, in the Long Description field, enter a more detailed description of the reason.  
This field is for informational purposes only.
6. If you want to use the reason immediately, then select the **Active** box.
7. Click **Update**.

### See Also

- [Section 5.3.1, "Creating a Reason"](#)

- [Section 5.3.3, "Removing a Reason"](#)

### 5.3.3 Removing a Reason

Use this procedure to delete a user-defined reason. You cannot delete seeded reasons.

#### Login

HTML Login URL

#### Responsibility

Interaction History JSP Administrator

#### Prerequisites

None

#### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Reason**.  
The Reasons page appears.
3. Select the **Select** box for the reason that you want to delete.  
You cannot delete seeded reasons.
4. Click **Delete**.  
The selected reason is removed from the list and the Reasons page refreshes.

#### See Also

- [Section 5.3.1, "Creating a Reason"](#)
- [Section 5.3.2, "Updating a Reason"](#)

## 5.4 Outcome-Result

Use the Outcome-Result hyperlink to maintain a list of outcome-result pairs.

---

---

**Note:** Migration of existing outcome-result mappings to wrap up mappings can be performed using the script JTFIHWRPCMP.sql.

---

---

### Tasks

You can perform the following tasks:

- [Section 5.4.1, "Creating an Outcome-Result Pair"](#)
- [Section 5.4.2, "Removing an Outcome-Result Pair"](#)

## 5.4.1 Creating an Outcome-Result Pair

Use this procedure to define a outcome-result pair.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

- [Create an outcome.](#)
- [Create a result.](#)

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Outcome-Result**.  
The Outcome-Result page appears.
3. Click **Create**.  
The Create Outcome-Result window opens.
4. From the Outcome list, select an outcome.
5. From the Result list, select a result.
6. Click **Create**.

**See Also**

- [Section 5.4.2, "Removing an Outcome-Result Pair"](#)

## 5.4.2 Removing an Outcome-Result Pair

Use this procedure to delete a user-defined outcome-result pair.

**Login**

HTML Login URL

**Responsibility**

Interaction History JSP Administrator

**Prerequisites**

None

**Steps**

1. Click the CRM Foundation tab.
2. In the side panel, click **Outcome-Result**.  
The Outcome-Result page appears.
3. Select the **Select** box for the outcome-result pair that you want to delete.
4. Click **Delete**.  
The selected outcome-result pair is removed from the list and the Outcome-Result page refreshes.

**See Also**

- [Section 5.4.1, "Creating an Outcome-Result Pair"](#)

## 5.5 Result-Reason

Use the Result-Reason hyperlink to maintain a list of result-reason pairs.

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---

**Note:** Migration of existing result-reason mappings to wrap up mappings can be performed using the script JTFIHWRPCMP.sql.

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---

## Tasks

You can perform the following tasks:

- [Creating a Result-Reason Pair](#)
- [Section 5.5.1, "Creating a Result-Reason Pair"](#)
- [Section 5.5.2, "Removing a Result-Reason Pair"](#)

## 5.5.1 Creating a Result-Reason Pair

Use this procedure to define a result-reason pair.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

- [Create a result.](#)
- [Create a reason.](#)

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Result-Reason**.  
The Result-Reason page appears.
3. Click **Create**.  
The Create Result-Reason window opens.
4. From the Result list, select a result.
5. From the Reason list, select a reason.
6. Click **Create**.

### See Also

- [Section 5.5.2, "Removing a Result-Reason Pair"](#)

## 5.5.2 Removing a Result-Reason Pair

Use this procedure to delete a user-defined reason-result pair.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Reason-Result**.  
The Reason-Results page appears.
3. Select the **Select** box for the reason-result pair that you want to delete.
4. Click **Delete**.  
The selected reason-result pair is removed from the list and the Reason-Results page refreshes.

### See Also

- [Creating a Result-Reason Pair](#)
- [Section 5.5.1, "Creating a Result-Reason Pair"](#)

## 5.6 Activity Type

Use the Activity Type hyperlink to maintain a list of activity types.

### Tasks

You can perform the following tasks:

- [Section 5.6.1, "Creating an Activity Type"](#)
- [Section 5.6.2, "Updating an Activity Type"](#)

- [Section 5.6.3, "Removing an Activity Type"](#)

## 5.6.1 Creating an Activity Type

Use this procedure to define an activity type.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Activity Type**.  
The Activity Types page appears.
3. Click **Create**.  
The Create Activity Type window opens.
4. In the Code field, type a code for the activity type.  
You cannot change this field after the activity type is saved.
5. In the Short Description field, enter a short description of the activity type.  
The short description appears in the list of activity types.
6. If you want to use the activity type immediately, then select the **Active** box.
7. Click **Create**.

### See Also

- [Section 5.6.2, "Updating an Activity Type"](#)
- [Section 5.6.3, "Removing an Activity Type"](#)

## 5.6.2 Updating an Activity Type

Use this procedure to update an activity type.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Activity Type**.  
The Activity Types page appears.
3. Click an ID hyperlink.  
The Edit Activity Type page appears.
4. In the Short Description field, enter a short description of the reason.  
The short description appears in the list of reasons.
5. If you want to use the activity type immediately, then select the **Active** box.
6. Click **Update**.

### See Also

- [Section 5.6.1, "Creating an Activity Type"](#)
- [Section 5.6.3, "Removing an Activity Type"](#)

## 5.6.3 Removing an Activity Type

Use this procedure to delete a user-defined activity type. You cannot delete seeded activity types.

### Login

HTML Login URL

## Responsibility

Interaction History JSP Administrator

## Prerequisites

None

## Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Activity Types**.  
The Activity Types page appears.
3. Select the **Select** box for the activity type that you want to delete.  
You cannot delete seeded activity types.
4. Click **Delete**.  
The selected activity type is removed from the list and the Activity Types page refreshes.

## See Also

- [Section 5.6.1, "Creating an Activity Type"](#)
- [Section 5.6.2, "Updating an Activity Type"](#)

## 5.7 Action

Use the Action hyperlink to maintain a list of actions.

### Tasks

You can perform the following tasks:

- [Section 5.7.1, "Creating an Action"](#)
- [Section 5.7.2, "Updating an Action"](#)
- [Section 5.7.3, "Removing an Action"](#)

### 5.7.1 Creating an Action

Use this procedure to define an action.

**Login**

HTML Login URL

**Responsibility**

Interaction History JSP Administrator

**Prerequisites**

None

**Steps**

1. Click the CRM Foundation tab.
2. In the side panel, click **Action**.  
The Actions page appears.
3. Click **Create**.  
The Create Action window opens.
4. In the Code field, type a code for the action.  
You cannot change this field after the action is saved.
5. In the Short Description field, enter a short description of the action.  
The short description appears in the list of actions.
6. If you want to use the action immediately, then select the **Active** box.
7. Click **Create**.

**See Also**

- [Section 5.7.2, "Updating an Action"](#)
- [Section 5.7.3, "Removing an Action"](#)

**5.7.2 Updating an Action**

Use this procedure to update an action.

**Login**

HTML Login URL

### **Responsibility**

Interaction History JSP Administrator

### **Prerequisites**

None

### **Steps**

1. Click the CRM Foundation tab.
2. In the side panel, click **Action**.  
The Actions page appears.
3. Click an ID hyperlink.  
The Edit Action page appears.
4. In the Short Description field, enter a short description of the reason.  
The short description appears in the list of reasons.
5. If you want to use the activity type immediately, then select the **Active** box.
6. Click **Update**.

### **See Also**

- [Section 5.7.1, "Creating an Action"](#)
- [Section 5.7.3, "Removing an Action"](#)

## **5.7.3 Removing an Action**

Use this procedure to delete a user-defined action. You cannot delete seeded actions.

### **Login**

HTML Login URL

### **Responsibility**

Interaction History JSP Administrator

### **Prerequisites**

None

**Steps**

1. Click the CRM Foundation tab.
2. In the side panel, click **Actions**.  
The Actions page appears.
3. Select the **Select** box for the action that you want to delete.  
You cannot delete seeded actions.
4. Click **Delete**.  
The selected action is removed from the list and the Actions page refreshes.

**See Also**

- [Section 5.7.1, "Creating an Action"](#)
- [Section 5.7.2, "Updating an Action"](#)

## 5.8 Wrap Up

Use the Wrap Up hyperlink to maintain a list of wrap ups.

**Tasks**

You can perform the following tasks:

- [Section 5.8.1, "Creating a Wrap Up"](#)
- [Section 5.8.2, "Updating a Wrap Up"](#)
- [Section 5.8.3, "Removing a Wrap Up"](#)

### 5.8.1 Creating a Wrap Up

Use this procedure to maintain a list of a wrap ups.

**Login**

HTML Login URL

**Responsibility**

Interaction History JSP Administrator

### Prerequisites

- [Create an outcome.](#)
- [Create a result.](#)
- [Create a reason.](#)

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Wrap Up**.  
The Wrap Ups page appears.
3. Click **Create**.  
The Create Wrap Up page appears.
4. Optionally, in the Campaign Type field, type the campaign type.
5. Optionally, from the Campaign Code field, type a campaign code or click **Go** to search for a campaign code.
6. From the Outcome field, select an outcome.  
If you select an outcome that requires a result, then you must select a result from the Result field.
7. Optionally, from the Result field, type a result or click **Go** to search for a result.  
If you select an result that requires a reason, then you must select a reason from the Reason field.
8. Optionally, from the Reason field, type a reason or click **Go** to search for a reason.
9. In the Effective Start Date field, type or select the start date for the wrap up.
10. Optionally, in the Effective End Date field, type or select the end date for the wrap up.
11. In the Level field, select a wrap up level.  
You have the following options:
  - Interaction
  - Activity
  - Both

12. Click **Create**.

### See Also

- [Section 5.8.2, "Updating a Wrap Up"](#)
- [Section 5.8.3, "Removing a Wrap Up"](#)

## 5.8.2 Updating a Wrap Up

Use this procedure to update a wrap up.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

- [Create an outcome.](#)
- [Create a result.](#)
- [Create a reason.](#)

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Wrap Up**.  
The Wrap Ups page appears.
3. Click an ID hyperlink.  
The Edit Wrap Up page appears.
4. Optionally, in the Campaign Type field, type the campaign type.
5. Optionally, from the Campaign Code field, type a campaign code or click **Go** to search for a campaign code.
6. From the Outcome field, select an outcome.

If you select an outcome that requires a result, then you must select a result from the Result field.

7. Optionally, from the Result field, type a result or click **Go** to search for a result.  
If you select an result that requires a reason, then you must select a reason from the Reason field.
8. Optionally, from the Reason field, type a reason or click **Go** to search for a reason.
9. In the Effective Start Date field, type or select the start date for the wrap up.
10. Optionally, in the Effective End Date field, type or select the end date for the wrap up.
11. In the Level field, select a wrap up level.  
You have the following options:
  - Interaction
  - Activity
  - Both
12. Click **Update**.

### **See Also**

- [Section 5.8.1, "Creating a Wrap Up"](#)
- [Section 5.8.3, "Removing a Wrap Up"](#)

## **5.8.3 Removing a Wrap Up**

Use this procedure to delete a user-defined wrap up. You cannot delete seeded wrap ups.

### **Login**

HTML Login URL

### **Responsibility**

Interaction History JSP Administrator

### **Prerequisites**

None

**Steps**

1. Click the CRM Foundation tab.
2. In the side panel, click **Wrap Up**.  
The Wrap Ups page appears.
3. Select the **Select** box for the wrap up that you want to delete.  
You cannot delete seeded wrap ups.
4. Click **Delete**.  
The selected wrap up is removed from the list and the Wrap Ups page refreshes.

**See Also**

- [Section 5.8.1, "Creating a Wrap Up"](#)
- [Section 5.8.2, "Updating a Wrap Up"](#)

## 5.9 Action-Activity Type

Use the Action-Activity Type hyperlink to maintain a list of action-activity type pair.

**Tasks**

You can perform the following tasks:

- [Section 5.9.1, "Creating an Action-Activity Type Pair"](#)
- [Section 5.9.2, "Updating an Action-Activity Type Pair"](#)
- [Section 5.9.3, "Removing an Action-Activity Type Pair"](#)

### 5.9.1 Creating an Action-Activity Type Pair

Use this procedure to define an action-activity type pair.

**Login**

HTML Login URL

**Responsibility**

Interaction History JSP Administrator

### Prerequisites

- [Create an action.](#)
- [Create an activity type.](#)
- If you want to define a default wrap up for the action-activity type pair, then [create a wrap up.](#)

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Action-Activity Type**.  
The Action-Activity Type page appears.
3. Click **Create**.  
The Create Action-Activity Type page appears.
4. From the Action field, select an action.
5. From the Activity Type field, select an activity type.
6. Optionally, from the Default Wrap Up ID field, select a default wrap up.
7. Click **Create**.

### See Also

- [Section 5.9.2, "Updating an Action-Activity Type Pair"](#)
- [Section 5.9.3, "Removing an Action-Activity Type Pair"](#)

## 5.9.2 Updating an Action-Activity Type Pair

Use this procedure to update an action-activity type pair.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

- [Create an action.](#)

- [Create an activity type.](#)
- If you want to define a default wrap up for the action-activity type pair, then [create a wrap up.](#)

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Action-Activity Type**.  
The Action-Activity Type page appears.
3. Click an action or activity type hyperlink.  
The Edit Action-Activity Type page appears.
4. From the Action field, select an action.
5. From the Activity Type field, select an activity type.
6. Optionally, from the Default Wrap Up ID field, select a default wrap up.
7. Click **Update**.

### See Also

- [Section 5.9.1, "Creating an Action-Activity Type Pair"](#)
- [Section 5.9.3, "Removing an Action-Activity Type Pair"](#)

## 5.9.3 Removing an Action-Activity Type Pair

Use this procedure to delete an action-activity type pair. You cannot delete seeded action-activity type pairs.

### Login

HTML Login URL

### Responsibility

Interaction History JSP Administrator

### Prerequisites

None

### Steps

1. Click the CRM Foundation tab.
2. In the side panel, click **Action-Activity Type**.  
The Action-Activity Type page appears.
3. Select the **Select** box for the action-activity type pair that you want to delete.  
You cannot delete seeded action-activity type pairs.
4. Click **Delete**.  
The selected action-activity type is removed from the list and the Action-Activity Type page refreshes.

### See Also

- [Section 5.9.1, "Creating an Action-Activity Type Pair"](#)
- [Section 5.9.2, "Updating an Action-Activity Type Pair"](#)

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# Using Oracle Customer Interaction History

This chapter describes task-based procedures for using Oracle Customer Interaction History. Topics include:

- [Section 6.1, "Interactions"](#)
- [Section 6.2, "Activities"](#)

## 6.1 Interactions

Use the Interaction tab to search for customer interactions.

### Tasks

You can perform the following tasks:

- [Section 6.1.1, "Viewing Interactions"](#)
- [Section 6.1.2, "Searching for Interactions"](#)

### 6.1.1 Viewing Interactions

Use the following procedure to view a list of customer interactions.

#### Login

HTML Login URL

#### Responsibility

Interaction History JSP User

### **Prerequisites**

None

### **Steps**

1. Click the Interactions tab.
2. If you want to view a note, click the Note icon.

### **See Also**

- [Section 6.1.2, "Searching for Interactions"](#)

## **6.1.2 Searching for Interactions**

Use the following procedure to search for customer interactions.

### **Login**

HTML Login URL

### **Responsibility**

Interaction History JSP User

### **Prerequisites**

None

### **Steps**

1. Click the Interactions tab.
2. Click the **Advanced Search** hyperlink.
3. Select the search criteria:

You may search for a criterion using character strings and the wildcard symbol (%). For example, to find customers starting with A, type A%.

  - a. In the Customer field, type a customer name or click **Go** to search for a customer name.
  - b. In the Agent field, type a agent name or click **Go** to search for a agent name.
  - c. In the Campaign field, type a campaign name or click **Go** to search for a campaign.

- d. In the Account field, type an account name or click **Go** to search for an account.
- e. In the Date fields, select a start date and end date.

If you want to clear the search criteria, then click **Clear**.

4. Click **Apply**.

### **See Also**

- [Section 6.1.1, "Viewing Interactions"](#)

## **6.2 Activities**

Use the Activities tab to search for customer activities.

### **Tasks**

You can perform the following tasks:

- [Section 6.2.1, "Viewing Activities"](#)
- [Section 6.2.2, "Searching for Activities"](#)

### **6.2.1 Viewing Activities**

Use the following procedure to view customer activities.

#### **Login**

HTML Login URL

#### **Responsibility**

Interaction History JSP User

#### **Prerequisites**

None

#### **Steps**

1. Click the Activities tab.
2. To narrow the search, select the search criteria:
  - a. From the Media Type list, select a type of media.

- b. From the Source list, select a source.
  - c. From the Activity list, select an activity type.
  - d. In the Start Date field, select a start date.
  - e. In the End Date field, select an end date.
3. Click **Apply**.

**See Also**

- [Section 6.2.2, "Searching for Activities"](#)

## 6.2.2 Searching for Activities

Use the following procedure to search for customer activities.

**Login**

HTML Login URL

**Responsibility**

Interaction History JSP User

**Prerequisites**

None

**Steps**

1. Click the Activities tab.
2. Click the **Advanced Search** hyperlink.
3. Select the search criteria:

You may search for a criterion using character strings and the wildcard symbol (%). For example, to find customers starting with A, type A%.

  - a. In the Customer field, type a customer name or click **Go** to search for a customer name.
  - b. In the Agent field, type a agent name or click **Go** to search for a agent name.
  - c. In the Media Type field, type a media type name or click **Go** to search for a media type.

- d. In the Activity field, type an activity type name or click **Go** to search for an activity type.
- e. In the Direction field, type a direction or click **Go** to search for a direction.
- f. In the Handler field, type a handler or click **Go** to search for a handler.
- g. In the Date fields, select a start date and end date.

If you want to clear the search criteria, then click **Clear**.

- 4. Click **Apply**.

### **See Also**

- [Section 6.2.1, "Viewing Activities"](#)



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## Customer Interaction History Concurrent Programs

### A.1 Interaction History Purge

#### A.1.1 Overview:

The Interaction History Purge application is a concurrent program design to remove interaction data based on a set of purge criteria. This program can be run as needed or it can be set-up to run on a regular intervals to remove old/unwanted interaction data.

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**Warning:** There are historical reports provided with Oracle Interaction Center Intelligence that rely on Oracle Customer Interaction History data. Review your historical reporting needs before making any decisions to purge data.

**ALWAYS BACKUP YOUR DATA ON A REGULAR BASIS. IT IS RECOMMENDED THAT YOU BACKUP THE FOLLOWING TABLES PRIOR TO RUNNING THE PURGE PROCESS:**

JTF\_IH\_INTERACTIONS  
JTF\_IH\_ACTIVITIES  
JTF\_IH\_MEDIA\_ITEMS  
JTF\_IH\_MEDIA\_ITEM\_LC\_SEGS  
JTF\_IH\_INTERACTION\_INTERS

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## A.1.2 Using Interaction History Purge

### Responsibility

Interaction History Data Purge

### Purge Criteria Definitions

The following purge criteria can be specified to control the data selected for purge. All criteria provided in a request is ANDed together to select the interactions to be purged. At least one criterion must be specified to successfully run a purge. To Purge all interactions the "Purge Type" must be specified as "ALL".

- Party IDs (Optional)  
Specify a list of comma-separated numbers that correspond to the party\_id(s) that you wish to purge. If a single party id is to be purged, then no commas are required.
- Party Type (Optional)  
Specify the Party Type of the parties associated with interactions to be purged.  
Valid Values:
  - PERSON
  - ORGANIZATION
  - PARTY\_RELATIONSHIP
- Start Date (Optional)  
The interaction start date from which to purge. Interactions with a start date greater than or equal to this value will be purged.
- End Date (Optional)  
The interaction end date to purge up to. Interactions with an end date less than or equal to this value will be purged.
- Safe Mode (Required)  
Allows the purge to be run in a report only mode.
  - TRUE (default) - No data deleted. Will report the number of Interactions, Activities and Media Items to be purged. No records are purged.
  - FALSE - Data is deleted.
- Purge Type (optional)

Specify 'ALL' to purge all interactions. When specifying other criteria (party ids, party type, start date and end date), leave this value empty.

- Activity Outcomes (optional)

Specify a list of comma-separated numbers that correspond to the activity outcome id(s) that you wish to purge. If a single outcome id is to be purged, then no commas are required. If an activity is found associated with an interaction that has one of the outcome ids specified, then the interaction and all of its activities are purged.
- Activity Results (optional)

Specify a list of comma-separated numbers that correspond to the activity result id(s) that you wish to purge. If a single result id is to be purged, then no commas are required. If an activity is found associated with an interaction that has one of the result ids specified, then that interaction and all of its activities are purged.
- Activity Reasons (optional)

Specify a list of comma-separated numbers that correspond to the activity reason id(s) that you wish to purge. If a single result id is to be purged, then no commas are required. If an activity is found associated with an interaction that has one of the result ids specified, then that interaction and all of its activities are purged.
- Interaction Outcomes (optional)

Specify a list of comma-separated numbers that correspond to the interaction outcome id(s) that you wish to purge. If a single outcome id is to be purged, then no commas are required.
- Interaction Results (optional)

Specify a list of comma-separated numbers that correspond to the interaction result id(s) that you wish to purge. If a single result id is to be purged, then no commas are required.
- Interaction Reasons (optional)

Specify a list of comma-separated numbers that correspond to the interaction reason id(s) that you wish to purge. If a single result id is to be purged, then no commas are required.

### **Steps**

1. Log into your forms application server with a user that has the Interaction History Data Purge responsibility.
2. Select "Requests" from the functions listed in the navigator menu.
3. Select "Submit A New Request"
4. Select "Submit a Single Request"
5. In the name field type "Interaction History Data Purge or use the LOV to select the name.
6. Once the program is selected the parameters window should automatically appear.
7. Set the purge criteria parameters as required to target the interaction data you wish to purge and click 'Ok'  
Note: You must specify a value for Safe Mode.
8. Select your schedule and completion options for the concurrent request if desired.
9. Click Submit.
10. View the status of your request and the purge log via the "Requests" function and form.