

# **Oracle® One-to-One Fulfillment**

Implementation Guide

Release 11*i*

**Part No. B10634-01**

April 2003

Oracle One-to-One Fulfillment Implementation Guide, Release 11i

Part No. B10634-01

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## **Oracle One-to-One Fulfillment Implementation Guide, Release 11*i***

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# Preface

## Intended Audience

Welcome to Release 11*i* of the Oracle One-to-One Fulfillment Implementation Guide.

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

- The principles and customary practices of your business area.
- Oracle One-to-One Fulfillment

If you have never used Oracle One-to-One Fulfillment, Oracle suggests you attend one or more of the Oracle One-to-One Fulfillment 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 One-to-One Fulfillment.

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 One-to-One Fulfillment.

Chapter 3 describes the system requirements and product dependencies for Oracle One-to-One Fulfillment. It also describes how to access the administrative console for Oracle One-to-One Fulfillment.

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 One-to-One Fulfillment.

Appendix A describes the fulfillment server parameters that can be set in the fulfillment server startup script.

Appendix B describes the commands used to operate a fulfillment server once it is running.

## 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 One-to-One Fulfillment.

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 One-to-One Fulfillment 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 One-to-One Fulfillment.

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.

## **Documents Related to This Product**

### **Implementing Oracle HRMS**

This guide describes how to implement Oracle Human Resource Management System.

### **Using Oracle HRMS — The Fundamentals**

Oracle Human Resource Management System is used to create the employees (agents) that will use the business application to submit a fulfillment request. Fulfillment agent groups are created in the Oracle One-to-One Fulfillment administrative console and assigned to a fulfillment server.

### **Oracle Common Application Components Implementation Guide**

This guide describes how to implement Oracle Common Application Components, including Resource Manager. The Resource Manager module in Oracle Common Application Components is used to import employees from Oracle Human Resource Management System as resources.

### **Oracle Common Application Components User Guide**

This guide describes how to use Oracle Common Application Components, including Resource Manager. Certain business applications require that employees also be resources. Fulfillment agent groups are created in the Oracle One-to-One Fulfillment administrative console and assigned to a fulfillment server.

### **Oracle Customer Interaction History Implementation Guide**

This guide describes how to implement Oracle Customer Interaction History. Oracle Customer Interaction History enables the creation of history records for fulfillment requests. You can use the Oracle One-to-One Fulfillment administrative console to set the interaction history outcomes and results for fulfillment requests that have been processed by the fulfillment server.

### **Oracle Marketing Encyclopedia System Implementation Guide**

This guide describes how to implement Oracle Marketing Encyclopedia System. Oracle Marketing Encyclopedia System is a file repository. Oracle Marketing Encyclopedia System stores master documents and queries that are used to specify fulfillment content.

## **Oracle Marketing Encyclopedia System Concepts and Procedures**

This guide describes how to use Oracle Content ManagerMarketing Encyclopedia System. The Oracle One-to-One Fulfillment administrative console provides an interface for creating master documents and queries. The master documents and queries stored in Oracle Marketing Encyclopedia System are used by Oracle Collections, Oracle Lease Management, Oracle TeleSales, Oracle TeleService, Oracle Sales Online, Oracle Scripting, and Oracle Student System.

## **Oracle Content Manager Implementation Guide**

This guide describes how to implement Oracle Content Manager. Oracle Content Manager is a file repository. Oracle Content Manager stores templates (similar to master documents in Oracle Marketing Encyclopedia System) and queries that are used to specify fulfillment content.

## **Oracle Content Manager User Guide**

This guide describes how to use Oracle Content Manager. The Oracle One-to-One Fulfillment administrative console provides an interface for creating templates (similar to master documents in Oracle Marketing Encyclopedia System) and queries. The templates and queries stored in Oracle Content Manager are used by Oracle Marketing.

## **Oracle Marketing Implementation Guide**

This guide describes how to implement Oracle Marketing. Oracle Marketing is a campaign management application.

## **Oracle Marketing User Guide**

This guide describes how to upload electronic collateral items (also called deliverables). Collateral may be included in fulfillment request that are created using Oracle Marketing, Oracle Scripting, Oracle Sales Online, and Oracle TeleSales.

## **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 11i. 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 Oracle9*i* 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 *OracleMetalink*.

### **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 One-to-One Fulfillment 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 One-to-One Fulfillment working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

### **OracleMetaLink**

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

**Alerts:** You should check *OracleMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows:

Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

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

## Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

## About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to

integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

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

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# Introduction

This chapter describes the Interaction Center product family. It also describes what is new in the current release.

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 11*i*.
- The third tier represents the database, which is comprised of 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](#)
- [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

The following features are new in this release:

- [Section 1.2.1, "Physical Collateral"](#)
- [Section 1.2.2, "Fulfillment Dashboard"](#)
- [Section 1.2.3, "Unsubscribe functionality"](#)
- [Section 1.2.4, "Resending requests"](#)
- [Section 1.2.5, "Pause and Continue request processing"](#)
- [Section 1.2.6, "Ability delete sent fulfillments requests"](#)
- [Section 1.2.7, "Performance related enhancements"](#)
- [Section 1.2.8, "Integration with Oracle Content Manager"](#)
- [Section 1.2.9, "Reporting enhancements"](#)
- [Section 1.2.10, "Master Document Editor"](#)

### 1.2.1 Physical Collateral

1-to-1 Fulfillment will provide enhancements to the current APIs to enable applications to pass physical collateral requests. In turn 1-1 Fulfillment will integrate with Order Management to execute these requests.

## 1.2.2 Fulfillment Dashboard

1-to-1 Fulfillment will introduce a sub request concept for batch requests to enable the tracking of the following outcomes for email requests:

- Total Sent
- Opened Emails
- Unopened Emails
- Malformed Emails
- Unsubscribes

The 1-to-1 Fulfillment status and history screens will be enhanced to display this information and APIs will be provided enabling other applications to access this information.

## 1.2.3 Unsubscribe functionality

1-to-1 Fulfillment will introduce an unsubscribe feature for email based fulfillment requests. The email will contain an embedded URL link to a web page, when the user accesses the web page, a validity check will be performed and the user will have the option to unsubscribe.

## 1.2.4 Resending requests

Enhance the existing Resubmit APIs and provide screens in the 1-to-1 Fulfillment Administration to search for a request by customer and resend the item using the original data and content.

## 1.2.5 Pause and Continue request processing

1-to-1 Fulfillment will introduce a pause and continue capability that will enable administrators to pause an in progress batch request and at a later time continue the request processing. The relevant APIs will also be provided to enable applications to initiate a request pause or continue.

## 1.2.6 Ability delete sent fulfillments requests

1-to-1 Fulfillment will provide a Delete option within 1-1 History screens. This will allow the deletion of any cancelled, completed and failed requests.

## 1.2.7 Performance related enhancements

1-to-1 Fulfillment will be making a number of Performance and Load Balancing enhancements to improve scalability. The administrator will be able to extend the number of servers as required and the request processing will be enhanced to enable batch requests to be executed across multiple servers.

## 1.2.8 Integration with Oracle Content Manager

1-to-1 Fulfillment will enable integration with Oracle Content Manager (OCM) in the following areas:

- Proving screens for uploading content into OCM
- Introduce a new approach for associating documents stored in OCM with queries. This will be accessible via the 1-to-1 Fulfillment Administration and to other applications via APIs
- Enable 1-to-1 Fulfillment requests to support the sending of documents stored in OCM

## 1.2.9 Reporting enhancements

Enhance the current 1-to-1 Fulfillment reporting available by providing APIs to enable applications to access this information and present it as appropriate.

## 1.2.10 Master Document Editor

1-to-1 Fulfillment's Master Document Editor will simplify the administrators' job when creating and publishing static and dynamic documents for use in communicating with customers.

The Master Document editor will provide a fast and simple mechanism for creating master documents, creating and associating a query and uploading into MES.



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## Detailed Product Description

This chapter provides a detailed description of Oracle One-to-One Fulfillment.

Topics include:

- [Section 2.1, "Oracle One-to-One Fulfillment Overview"](#)
- [Section 2.2, "Concepts"](#)

### 2.1 Oracle One-to-One Fulfillment Overview

Oracle One-to-One Fulfillment provides E-Business Suite business applications with a centralized mechanism for managing fulfillment. Fulfillment is the process of compiling and distributing information to customers.

Oracle One-to-One Fulfillment consists of an application programming interface (API) and a server. The Oracle One-to-One Fulfillment API is used by the E-Business Suite business application to initiate a request for fulfillment processing. The fulfillment request identifies the content and the server. The Oracle One-to-One Fulfillment server processes the request. It compiles the content and sends the content to an output device. Output devices include email, fax, and print servers.

Each business application has a unique interface for making a fulfillment request on behalf of one or more parties. Examples of outbound correspondence in E-Business Suite include:

- Notification letters
- Account statements
- Lease terms
- Product information

## 2.1.1 Business Flow

Using the Oracle One-to-One Fulfillment application programming interface (API), the E-Business Suite business application initiates a request for fulfillment processing. The business application:

- Generates a numerical identifier for the request
- Specifies the components of the content
- Specifies the output channel
- Specifies the fulfillment server
- Places the fulfillment request in the fulfillment request queue
- Creates a request status record
- Creates a request history record

The Oracle One-to-One Fulfillment server monitors the fulfillment request queue. It retrieves fulfillment requests from the queue and processes the requests. The server:

- Verifies the contact preferences of the recipient(s)
- Compiles the content
- Sends the content to an output device (email, fax, or print server)
- Updates the request status and history
- Creates a customer interaction record in Oracle Interaction History

## 2.2 Concepts

Topics include:

- [Section 2.2.1, "Advanced Queuing"](#)
- [Section 2.2.2, "Fulfillment Requests"](#)
- [Section 2.2.3, "Fulfillment Server"](#)
- [Section 2.2.4, "Fulfillment Output Channels"](#)
- [Section 2.2.5, "Agent Groups"](#)
- [Section 2.2.6, "E-Mail Tracking"](#)
- [Section 2.2.7, "MES Templates"](#)
- [Section 2.2.8, "MES Master Documents"](#)

- [Section 2.2.9, "OCM Templates"](#)
- [Section 2.2.10, "Document Editor"](#)
- [Section 2.2.11, "Unsubscribe URL"](#)
- [Section 2.2.12, "Queries"](#)
- [Section 2.2.13, "Collateral"](#)
- [Section 2.2.14, "Fulfillment Request History"](#)
- [Section 2.2.15, "Fulfillment Request Status"](#)
- [Section 2.2.16, "Fulfillment Server Startup Scripts"](#)

## 2.2.1 Advanced Queuing

Advanced Queuing (AQ) is the message queuing functionality of the Oracle database. AQ enables asynchronous communication between applications using queues. A queue is a repository for messages. Queues are stored in queue tables. Each queue table is a database table and contains one or more queues.

AQ supports native XML messages and also allows AQ operations to be defined in the XML-based Internet-Data-Access-Presentation (IDAP) format. IDAP, an extensible message invocation protocol, is built on Internet standards, using HTTP and email protocols as the transport mechanism, and XML as the language for data presentation.

In this case, the client, a user or Internet application, produces structured XML messages.

Business applications submit the fulfillment data in accordance with the Oracle One-to-One Fulfillment API procedures. The Oracle One-to-One Fulfillment API procedures format the fulfillment request as an XML message.

The fulfillment request that is created by the business application is in the format of an XML message. The business application places fulfillment requests in a queue (enqueueing) and the fulfillment server retrieves fulfillment requests from a queue (dequeueing)

For more information about Advanced Queuing, see *Application Developer's Guide - Advanced Queuing*.

## 2.2.2 Fulfillment Requests

A fulfillment request is the data object that is submitted for fulfillment processing. The E-Business Suite business application uses the Oracle One-to-One Fulfillment application programming interface (API) to specify the components of the content (for example, a master document from Oracle Marketing Encyclopedia System), the output channel (email, fax, or print), and the fulfillment server. The resulting data object is placed in the fulfillment request queue. The fulfillment request queue is provided by Advanced Queuing (AQ).

Each business application has a unique interface for making a fulfillment request on behalf of one or more parties. For information about how to initiate a fulfillment request, see the user guide or online help for the business application.

### Content

The following table briefly describes the different type of content. For a more detailed description, see the relevant section.

Content Type	Location	Description	Set Up in Oracle One-to-One Fulfillment?
Master Document	Oracle Marketing Encyclopedia System	A static or dynamic HTML document.	Yes
Query	Oracle Marketing Encyclopedia System	A SQL statement that provides data for a dynamic master document	Yes
Collateral	Oracle Marketing	A static document of any type	No
Template	Oracle Marketing Encyclopedia	A grouping of master documents and collateral documents.	Yes
Template	Oracle Content Manager	A static or dynamic HTML document	Yes
Query	Oracle Content Manager	A SQL statement that provides data for a dynamic template.	Yes

## 2.2.3 Fulfillment Server

Fulfillment server is a multi-threaded Java server that processes fulfillment requests by de-queuing the request from an Advanced Queue. Business applications place fulfillment request in the queue using Fulfillment APIs.

You can specify the time period during which the server polls the fulfillment request queues in the database. It does not physically start or stop the server. If running, the server will continue to process retrieved fulfillment requests even when it is not polling the database.

When a fulfillment request is processed, it create a interaction record in Oracle Interaction History. You can select which outcome reason and result your want to associate with a successful or failed fulfillment request.

## Monitors

The following table describes the monitoring processes in the fulfillment server.

Monitor	Description
Process Monitor	The Process Monitor monitors the states of the internal server processes and ensures that the correct number of processes are allocated for performing work on the internal request queue.
Request Monitor	The Request Monitor Its function is to monitor the Advance Queue (AQ) for incoming fulfillment requests and places them, in a self-limiting fashion, into an internal request queue where they can be fed into the Processes.
Command Monitor	Its function is to monitor commands received from the command prompt provided that the fulfillment server is configured so that commands can be received. The latest version of the fulfillment server has this feature automatically turned on. It can be turned on and off by placing the flag '-Dengine.CommandPromptEnabled=true/false' in the fulfillment server start script
Remote Monitor	Its function is to monitor commands received through the fulfillment server's command port. This port is set in the fulfillment server start script with the flag '-Dengine.CommandPort=#####'. Without this command port, this monitor will not run.
Database Monitor	Its function is to monitor database activity following a database crash or disconnect from the database. This monitor temporarily shuts down the fulfillment server into a sleep mode until connection to the database can be re-established.

## 2.2.4 Fulfillment Output Channels

The fulfillment server compiles the content and sends the content to an output device. Output devices include email, fax, and print servers.

For email fulfillment requests, Oracle One-to-One Fulfillment supports any email server that uses SMTP (Simple Mail Transfer Protocol) to transmit e-mail messages. For fax and print fulfillment requests, Oracle One-to-One Fulfillment supports Captaris RightFax.

One or more email servers can be associated with a Fulfillment Server, but only the email server flagged as the default will be used when processing email fulfillment requests.

If a site has multiple email servers, it is useful to associate more than one email server with each fulfillment server. In the event of an outage on one email server, the fulfillment server can easily be switched to use another email server, simply by changing the default.

## 2.2.5 Agent Groups

Fulfillment agent groups are created in the Oracle One-to-One Fulfillment administrative console and assigned to a fulfillment server.

## 2.2.6 E-Mail Tracking

Oracle One-to-One Fulfillment tracks the outcomes of emails sent via batch request. The following statistics are shown on the Status page for the batch request:

- Sent
- Opened
- Unopened
- Malformed
- Unsubscribes

Fulfillment server dispatches the email requests to all the recipients in the blitz. When a recipient opens the email to read, at the end of the email is an invisible reference to an image on a web server. As the email is downloaded, when a reference to the hidden image is encountered, the client tries to download the image from that particular web server. However, the hidden image tag references a jsp, which is responsible for updating the required tables with information that specifies which recipient had read the email. The jsp that handles the hidden image needs to be accessible outside the firewall.

The information that is required to decide which recipient has opened the email is present as a part of the query string in the URL. The jsp parses all the parameters from the query string and updates the database based on the request url's query string. Also, the jsp is responsible for returning a substitute image instead of the one that is originally requested. The substitute image is a transparent image.

## 2.2.7 MES Templates

A template is a grouping of material that is useful but not required for distributing master documents and collateral. Collateral is static content.

An Oracle Marketing Encyclopedia System template is a package of content that is compiled by the fulfillment server. The fulfillment request identifies the template being used to compile the content.

## 2.2.8 MES Master Documents

A master document is an .HTML file that contains the main content in a fulfillment item. Examples of master documents include:

- Cover letters
- Service request notifications
- Past due notices
- Lease contracts
- Sales offers
- Financial statements

A master document can be static or dynamic. A static master document does not contain merge fields. So, each recipient receives the same content. A dynamic master document uses merge fields to incorporate information from the database (such as the name of the recipient or account information) into the content. So, each recipient receives personalized content.

The information for the merge fields in a dynamic master document is supplied by an query. See [Section 2.2.12, "Queries"](#) for information about queries.

A master document can standalone or be a part of an MES template. Whether a master document is used standalone or made part of a template is determined by how the master document is used by the business application. See [Section 2.2.7, "MES Templates"](#) for information about MES templates.

A master document can be created in an HTML editor or word processing application. It must be an HTML file. It can be uploaded as an HTML file or ZIP file.

## 2.2.9 OCM Templates

Oracle One-to-One Fulfillment supports the processing of fulfillment requests using content templates that are stored in Oracle Content Manager. Oracle Content

Manager is a document repository for fulfillment content. Oracle Content Manager content types include:

- **Template (AMF\_TEMPLATE)**

Oracle Content Manager templates are used to compile the content for the fulfillment requests. Templates consist of:

- a link to a text or HTML document with or without merge fields
- a link to a query (required if the document has merge fields)
- optionally, a link to one or more deliverables
- optionally, a link to one or more attachments

Documents, which are stored in FND\_LOBS, can be created using a text editor in Oracle Content Manager or using an external tool. The interface for creating Oracle Content Manager templates, including documents, is available in the Oracle One-to-One Fulfillment administration console.

- **Query (AMF\_QUERY)**

Oracle Content Manager queries are used to supply the data for the merge fields in a merge document. A query is assigned to a document in the Oracle Content Manager template. A query can be associated with more than one document.

Queries, which are stored in FND\_LOBS, can be created using Oracle Content Manager. The interface for creating Oracle Content Manager queries is available in the Oracle One-to-One Fulfillment administration console.

- **Email Deliverable (AMF\_EMAIL\_DELIVERABLE)**

Oracle Content Manager deliverables are text or HTML documents that are inserted in the body of the message when a fulfillment request is processed by Oracle One-to-One Fulfillment. These are fixed content documents, such as legal disclaimers, that do not contain merge fields. Deliverables are inserted after the merge document in the order that they appear in the template definition. Deliverables are uploaded via Oracle Marketing Online or Oracle Content Manager.

- **Attachment (AMF\_ATTACHMENT)**

Oracle Content Manager attachments are files which are attached to the message when a fulfillment request is processed by Oracle One-to-One Fulfillment. Documents of any type are supported. Attachments are uploaded via Oracle Content Manager.

A template is a file, typically a text or .html file, with optional merge fields. A query, which is assigned to the template, is used to supply data for the merge fields. Both templates and queries can be created in Oracle Content Manger which is available in the Oracle One-to-One Fulfillment administration console. In addition, predefined deliverables and attachments can be associated with the template.

## 2.2.10 Document Editor

The document editor is an interface for creating Oracle Marketing Encyclopedia System master documents or Oracle Content Manager templates. Text can be written in rich text format. Rich text format supports multiple fonts, sizes, and styles.

## 2.2.11 Unsubscribe URL

The Unsubscribe option in the fulfillment server configuration causes the fulfillment server to insert a hypertext link into the content of emails that will allow email recipients to modify their contact preferences.

For email requests, the outgoing email contains an embedded URL to a web page. The URL leads to the Contact Preferences page in Oracle Marketing Online. The Contact Preferences page allows the recipient to set contact channels.

The format of the unsubscribe link is:

```
http://<host>:<port>/OA_HTML/unsubscribe.jsp?<request_id>?<party_id>
```

The request\_id is the numerical identifier for the fulfillment request. If the recipient elects to unsubscribe from email contact or all contact, then Oracle Marketing Online uses the request identifier to update Oracle Interaction History with this information.

The party\_id is. The party identifier is encrypted so that it is not visible to the email recipient. The encryption key in the JTF\_FM\_SECURITY\_KEY profile option is used by Oracle Marketing Online to decrypt the party identifier so that the contact preference settings for the party can be accessed.

When the recipient accesses the web page, the recipient can unsubscribe from email. This action is recorded in Oracle Interaction History and, if email tracking is enabled, is reflected in the email statistics for the batch or mass email fulfillment request.

Use the Unsubscribe box on the Email Server page for the fulfillment server to enable or disable the unsubscribe link. This option affects the email fulfillment requests

processed by all email servers assigned to the fulfillment server. It cannot be set for a specific email server.

## 2.2.12 Queries

A query is an SQL (structured query language) statement that generate selected data from a database. A query serves two purposes. The first is to determine which records meet the defined criteria. The second is to determine which fields of those records are returned. The returned data is merged with a template to create a customized email for each recipient.

A single query may be associated with more than one template provided that the merge field names match the database column names or aliases and there is a one to one correspondence between the number of merge fields and the number of columns queried in the SQL statement.

Use the following syntax when creating an SQL query:

```
SELECT <column name> <alias>,  
       <column name> <alias>,  
       <column name> <alias>,  
       <column name> <alias>  
FROM <table name>  
WHERE <column name> = :<bind variable>
```

---

---

**Note:** Aliases are optional as demonstrated in the example below.

---

---

SQL statements typically end with a semicolon (;). However, in this case, the query engine appends the semicolon itself. Do NOT append a semicolon to the end of this query.

- Column name aliases follow the column names and appear before the comma or the next keyword. Use aliases as substitutes in master documents for the actual column names. Aliases are not required, but can be helpful.
- The table from which the columns are selected follows the FROM keyword.
- The bind variable specifies which row is pulled from the table to give the actual bits of data for each merged document. A colon in front of a bind variable makes it a global variable. This enables the query to recognize it after the value is passed in from the user interface.

For example:

```

SELECT person_last_name lname,
       party_id CustNumb,
       creation_date,
       phone_number
FROM jtf_contact_points_v
WHERE person_first_name = :fname;

```

If you enter the previous sample query as the query string, then the data source utility pulls the aliases rather than the column names when it creates the data source file.

The window opened by the data source utility would then show the following in a plain background window with nothing else:

```
lname      CustNumb      creation_date      phone_number
```

Merge fields should match exactly with the Master Document.

Creating a datasource file is an optional method of saving queried data to be used in a master document. A datasource file is a text file that contains tab-separated merge fields that have been obtained by a query. Use the datasource file to obtain the columns available from the query so that they can be used as merged fields. Perform the following steps to create a datasource file. This can be helpful when creating master documents.

- ?The master document must be an HTML file or an Adobe Acrobat PDF file.
- In HTML files, remove from the HTML code any propriety information inserted by the word processor, otherwise the server will not process the document. For example, saving a Microsoft Word document as HTML inserts Microsoft proprietary information in the <HTML> header tag, that is, a line in the header stating

```
<META NAME = "Generator" CONTENT="Microsoft Word 97">
```

To remove such propriety information, use a generic text editor such as Microsoft Notepad or Wordpad.

### 2.2.13 Collateral

Oracle Marketing is used to upload collateral items. Collateral may be included in fulfillment requests that are created using Oracle Marketing, Oracle Scripting, Oracle Sales Online, and Oracle TeleSales.

## 2.2.14 Fulfillment Request History

The History subtab provides access to the history of fulfillment requests that have been processed, successfully or unsuccessfully, by a fulfillment server. You can view the details of a fulfillment request, re-submit a fulfillment request, forward a fulfillment request, and delete a history entry from the history list.

## 2.2.15 Fulfillment Request Status

The Status subtab provides access to the status of fulfillment requests that have been placed in the request queue, but not yet retrieved by the fulfillment server. You can view the status of a fulfillment request, cancel a fulfillment request, and delete a status entry from the status list.

## 2.2.16 Fulfillment Server Startup Scripts

The remote command script allows you to interact with the fulfillment server without the need to maintain the original command prompt used to start the server. When you want to issue a command, you type the name of the remote command script and the command.

The fulfillment server is configured in the startup script to monitor a port for remote commands. The port is specified in both the startup script for the server and the remote command script. The remote command script runs on the same machine as the fulfillment server or on a machine that is on the same network as the fulfillment server.

When a command is sent through the remote command script, the machine that issued the command waits for a response and terminates activity after it receives the response. To prevent unnecessary workload for the fulfillment server, the machine that issues the remote command only retains a connection to the fulfillment server for the duration of the remote command.

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## Before You Begin

This chapter describes the system requirements and product dependencies for Oracle One-to-One Fulfillment. It also describes how to access the administrative console for Oracle One-to-One Fulfillment.

Topics include:

- [Section 3.1, "System Requirements"](#)
- [Section 3.2, "Mandatory Dependencies"](#)
- [Section 3.3, "Conditional Dependencies"](#)
- [Section 3.4, "Related Documentation"](#)
- [Section 3.5, "Installing Oracle One-to-One Fulfillment"](#)
- [Section 3.6, "Accessing Oracle One-to-One Fulfillment"](#)

### 3.1 System Requirements

This section describes the system requirements for Oracle One-to-One Fulfillment.

Topics include:

- [Section 3.1.1, "Fulfillment Server"](#)
- [Section 3.1.2, "Output Servers"](#)

#### 3.1.1 Fulfillment Server

The fulfillment server processes the fulfillment requests that have been submitted by the business applications. All of the files required to use the fulfillment server are installed when Oracle Applications is installed. You can run the fulfillment server on the applications server. You can also run the fulfillment server from separate

machine that has access, via a network, to the Oracle Applications environment and database. If you choose to run the fulfillment server on another machine you must provide the following supporting files on the machine:

- [Java Files](#)
- [Java Development Kit \(JDK\) or Java Runtime Environment \(JRE\)](#)
- [Database Connectivity File](#)

### 3.1.1.1 Java Files

You need access to the following Oracle Applications Java files in order to run the fulfillment server:

- apps.zip
- jdbc111.zip or jdbc12.zip

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**Note:** If you are using JDK or JRE 1.1.8, then put jdbc111.zip before jdbc12.zip in the CLASSPATH. If you are using JDK or JRE 1.2 or higher, then put jdbc12.zip before jdbc111.zip in the CLASSPATH. See [Section 3.1.1.2, "Java Development Kit \(JDK\) or Java Runtime Environment \(JRE\)"](#) for information about JDK and JRE.

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- xmlparserv2.zip

The apps.zip file contains the instructions for the fulfillment server. The apps.zip file is maintained in AU\_TOP, the path to the Application Utilities directory, and copied to JAVA\_TOP, the path to the java directory, for runtime operation. The same file exist in both the AU\_TOP and JAVA\_TOP directories.

The jdbc111.zip and jdbc12.zip files enable Java programs to access the Oracle database server. The xmlparserv2.zip files is the XML Parser library. These files are maintained in JAVA\_TOP.

If the fulfillment server is run on the Oracle Applications server, then you can use the Java files on the Oracle Applications server. If the fulfillment server is run on another machine, then you will have to point to the Java files on the Oracle Applications server or copy the Java files to the machine.

If you point to the Java files, then patches to the Java files are immediately available to the machine. In addition, system processing may be slower. If you copy the Java files to the machine, patches to the Java files on the Oracle Applications servers are

not immediately available to the machine. However, system processing may be faster.

You have the following options:

- Create a network file system link to the Java files on the Oracle Applications server to which patches are most often applied, such as the Administration Server. The format of the path to the files will depend on how the network file system is set up. For information specific to your enterprise, please contact your system administrator.
- Perform a web tier installation of Oracle Applications. This will automatically copy the Java files.
- Manually copy the Java files from an Oracle Applications server to the machine.

The location of the files must be specified in the CLASSPATH. The CLASSPATH is a parameter in the adovars.env file, a file that is called from the main applications environment file (<dbname>.env). It lists paths to the files that are scanned for Java class files needed at runtime.

You can override a path in the CLASSPATH parameter by specifying a different path in the startup script for the fulfillment server. In the following example, the line specifies the path to the apps.zip file on a machine other than the Oracle Applications server.

```
set CLASSPATH=%CLASSPATH%;D:\javafiles\apps.zip
```

### 3.1.1.2 Java Development Kit (JDK) or Java Runtime Environment (JRE)

The Java Development Kit (JDK) or Java Runtime Environment (JRE) provide the Java virtual machine in which the fulfillment server runs. Java Runtime Environment (JRE) is installed during the installation of the Oracle Applications web server. JRE is found in JAVA\_TOP, the path to the java directory.

If the fulfillment server is run on the applications server, then you can use the JRE on the Oracle Applications web server. If the fulfillment server is run on another machine, then you will have to install JDK or JRE on the machine.

To install JDK or JRE on another machine, you have the following options:

- Perform a web tier installation of Oracle Applications on the target machine. This will automatically install JRE.
- Obtain JDK or JRE and manually install it and on the target machine.

You can download JDK or JRE from Sun or the hardware vendor. You should perform all necessary operating system tuning for the specific platform. For example, on certain HP operating systems, it is required that the operating system kernel parameter `max_proc_thread` be raised from the default value of 64 to at least 1024. Please contact your hardware vendor for additional information.

You can use the following JDK or JRE versions to run the fulfillment server:

- 1.3.1
- 1.3.0
- 1.2.2
- 1.1.8

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**Note:** If you are using JDK or JRE 1.1.8, then put `jdbc11.zip` before `jdbc12.zip` in the CLASSPATH. If you are using JDK or JRE 1.2 or higher, then put `jdbc12.zip` before `jdbc11.zip` in the CLASSPATH. See [Section 3.1.1.1, "Java Files"](#) for information about Java database connectivity files.

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The location of the certain zip and jar files in the JDK or JRE must be specified in the CLASSPATH. The CLASSPATH is a parameter in the `adovars.env` file, a file that is called from the main applications environment file (`<dbname>.env`). It lists paths to the files that are scanned for Java class files needed at runtime.

You can override a path in the CLASSPATH parameter by specifying a different path in the startup script for the fulfillment server. In the following example, the line specifies the path to the `classes.zip` file on a machine other than the Oracle Applications server.

```
set CLASSPATH=%CLASSPATH%;D:\jdk1.1.8\lib\classes.zip
```

### 3.1.1.3 Database Connectivity File

The database connectivity file (`*.dbc`) is a text file that contains the connection parameters for the Oracle Applications database. A database connectivity file is automatically created when Oracle Applications is installed.

There can be more than one database connectivity file. While a database connectivity file can have any name (`*.dbc`), the typical naming convention is `<host_`

name>\_<dbname>.dbc. These files are usually found in FND\_TOP in the secure directory (FND\_TOP/secure/<host\_name>\_<dbname>.dbc).

If the fulfillment server is run on the Oracle Applications server, then you can use the database connectivity file that is created when Oracle Applications is installed. If the fulfillment server is run on another machine, then you will have to put a database connectivity file on the machine. You can copy the database connectivity file or manually create one. The location of the database connectivity file must be specified in the startup script for the fulfillment server.

The following table lists the necessary connection parameters for the database connectivity file. If you do not know the appropriate values, then contact your Oracle Applications system administrator or database administrator.

Parameter	Description
TWO_TASK	The name of the database or the SID.
FNDNAM	The default value is 'apps.' Do not change this value.
GWYUID	The gateway userid and password.
FND_MAX_JDBC_CONNECTIONS	The default value is '20.' Do not change this value.
GUEST_USER_PWD	An Oracle Applications database guest userid and password.
APPS_JDBC_DRIVER_TYPE	The default value is 'THIN.' Do not change this value.
DB_HOST	The name of the host machine for the Oracle Applications database.
DB_PORT	The listener port number for the Oracle Applications database. The Oracle database client on the target machine communicates with the Oracle Applications database using this port number.

The following is an example of a DBC file:

```
#DB Settings
#10APR2003
TWO_TASK=dbsid
FNDNAM=apps
GWYUID=applsypub/pub
GUEST_USER_PWD=userid/password
APPS_JDBC_DRIVER_TYPE=THIN
DB_HOST=machinename.domainname.com
DB_PORT=1527
```

### 3.1.2 Output Servers

The fulfillment server sends fulfillment content to an output device. Output devices include e-mail, fax, and print servers. In addition to the standard technology that is installed with Oracle Applications, the following technology is required to successfully implement Oracle One-to-One Fulfillment:

- For e-mail output, any outgoing e-mail server that complies with SMTP (Simple Mail Transfer Protocol), for example, UNIX Sendmail
- For fax or print output, Captaris RightFax 8.0 Enterprise Server

See [Appendix 6, "Integration Tasks"](#) for information about integrating Captaris RightFax 8.0 Enterprise Server with Oracle One-to-One Fulfillment.

## 3.2 Mandatory Dependencies

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

- [Oracle Human Resource Management System](#)
- [Oracle Common Application Components](#)
- [Oracle Customer Interaction History](#)
- [Oracle Marketing Encyclopedia System](#)

Required for use with Oracle Collections, Oracle Lease Management, Oracle TeleSales, Oracle TeleService, Oracle, Sales Online, Oracle Scripting, and Oracle Student System.

- [Oracle Content Manager](#)

Required for use with Oracle Marketing.

- [Oracle Marketing](#)

Required for use with Oracle Marketing, Oracle Scripting, Oracle Sales Online, and Oracle TeleSales.

- [A Business Application](#)

## **Oracle Human Resource Management System**

Oracle Human Resource Management System is used to create the employees (agents) that will use the business application to submit a fulfillment request. Fulfillment agent groups are created in the Oracle One-to-One Fulfillment administrative console and assigned to a fulfillment server.

For information about Oracle Human Resource Management System, see *Implementing Oracle HRMS* and *Using Oracle HRMS — The Fundamentals*.

## **Oracle Common Application Components**

Certain business applications require that employees also be resources. The Resource Manager module in Oracle Common Application Components is used to import employees from Oracle Human Resource Management System as resources. Fulfillment agent groups are created in the Oracle One-to-One Fulfillment administrative console and assigned to a fulfillment server.

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

## **Oracle Customer Interaction History**

Oracle Customer Interaction History enables the creation of history records for fulfillment requests. You can use the Oracle One-to-One Fulfillment administrative console to set the interaction history outcomes and results for fulfillment requests that have been processed by the fulfillment server.

For information about Oracle Interaction History, see *Oracle Interaction History Implementation Guide*.

## **Oracle Marketing Encyclopedia System**

Oracle Marketing Encyclopedia System stores master documents and queries that are used to specify fulfillment content. The master documents and queries stored in Oracle Marketing Encyclopedia System are used by the following business applications:

- Oracle Collections
- Oracle Lease Management
- Oracle TeleSales
- Oracle TeleService
- Oracle Sales Online

- Oracle Scripting
- Oracle Student System

The Oracle One-to-One Fulfillment administrative console provides an interface for

- Creating master documents using a document editor and uploading those master documents to Oracle Marketing Encyclopedia System
- Uploading externally created master documents to Oracle Marketing Encyclopedia System
- Creating queries in Oracle Marketing Encyclopedia System

For information about Oracle Marketing Encyclopedia System, see *Oracle Marketing Encyclopedia System Implementation Guide* and *Oracle Marketing Encyclopedia System Concepts and Procedures*.

### **Oracle Content Manager**

Oracle Content Manager stores templates (similar to master documents in Oracle Marketing Encyclopedia System) and queries that are used to specify fulfillment content. The templates and queries stored in Oracle Content Manager are used by Oracle Marketing.

The Oracle One-to-One Fulfillment administrative console provides an interface for

- Creating templates using a document editor and uploading those templates to Oracle Content Manager
- Uploading externally created templates to Oracle Content Manager
- Creating queries in Oracle Content Manager

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

### **Oracle Marketing**

Oracle Marketing is used to upload collateral items. Collateral may be included in fulfillment requests that are created using Oracle Marketing, Oracle Scripting, Oracle Sales Online, and Oracle TeleSales.

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

## A Business Application

Fulfillment requests originate from a business application. The following business applications integrate with Oracle One-to-One Fulfillment:

- [Oracle Collections](#)
- [Oracle Lease Management](#)
- [Oracle Marketing](#)
- [Oracle Scripting](#)
- [Oracle Sales Online](#)
- [Oracle Student System](#)
- [Oracle TeleSales](#)
- [Oracle TeleService](#)

**Oracle Collections** Oracle Collections is a debt recovery application. Agents use Oracle Collections to manage delinquent accounts and collect payments. Agents also use Oracle Collections to send correspondence, such as a request for payment or an account statement, to a party.

Oracle Collections uses Oracle One-to-One Fulfillment to process single or batch requests via e-mail, fax, and print output channels. The content of the correspondence is stored in Oracle Marketing Encyclopedia System as reusable master documents. The master documents can be personalized using merge fields and queries.

Oracle Collections generates a fulfillment request when an automatic work item is generated or an agent chooses to send a master document. Oracle Collections also records the status of the fulfillment request in Oracle Customer Interaction History.

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

**Oracle Lease Management** Oracle Lease Management is a asset management application. Agents use Oracle Lease Management to manage the leases for assets. Agents also use Oracle Lease Management to send correspondence, such as the terms of a lease, to a party.

Oracle Lease Management uses Oracle One-to-One Fulfillment to process single requests via e-mail. The content of the correspondence is stored in Oracle Marketing Encyclopedia System as reusable master documents. The master documents can be personalized using merge fields and queries.

Oracle Lease Management generates a fulfillment request when an agent chooses to send a master document. Oracle Lease Management also records the status of the fulfillment request in Oracle Customer Interaction History.

For information about Oracle Lease Management, see *Oracle Lease Management Implementation Guide* and *Oracle Lease Management User's Guide*.

**Oracle Marketing** Oracle Marketing is a campaign management application. Marketing professionals use Oracle Marketing to define, execute, and monitor marketing campaigns. Marketing professionals also use Oracle Marketing to send correspondence, such as an offer, to marketing targets.

Oracle Marketing uses Oracle 1-to-1 Fulfillment to process single or batch requests via e-mail. The content of the correspondence is stored in Oracle Content Manager as reusable template (similar to master documents in Oracle Marketing Encyclopedia System). The templates can be personalized using merge fields and queries. Collateral items (also called deliverables) are uploaded using Oracle Marketing.

Oracle Marketing generates a fulfillment request when a user chooses to send a template. Oracle Marketing also records the status of the fulfillment request in Oracle Customer Interaction History.

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

**Oracle Scripting** Oracle Scripting is a script and survey management application. Survey administrators use Oracle Scripting to define, execute, and monitor surveys. Survey administrators also use Oracle Scripting to send correspondence, such as invitations and reminders, to survey targets.

Oracle Scripting uses Oracle One-to-One Fulfillment to process batch requests via e-mail. The content of the correspondence is stored in Oracle Marketing Encyclopedia System as reusable master documents. The master documents can be personalized using merge fields and queries. Optional collateral items (also called deliverables) are uploaded using Oracle Marketing.

Oracle Scripting generates a fulfillment request when the survey campaign is deployed. Oracle Scripting also records the status of the fulfillment request in Oracle Customer Interaction History.

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

**Oracle Sales Online** Oracle Sales Online is a sales management application. Sales representatives use Oracle Sales Online to manage sales leads and opportunities. Agents also use Oracle Sales Online to send correspondence, such as a quote, to a party.

Oracle Sales Online uses Oracle One-to-One Fulfillment, in the form of a wizard, to process single requests via e-mail and fax. The content of the correspondence is stored in Oracle Marketing Encyclopedia System as reusable master documents. The master documents can be personalized using merge fields and queries. Collateral items (also called deliverables) are uploaded using Oracle Marketing. A template is used to join master documents and collateral item in a single package.

Oracle Sales Online generates a fulfillment request when an agent chooses to compile a templates that contains a master document and collateral items. Oracle Sales Online also records the status of the fulfillment request in Oracle Customer Interaction History.

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

**Oracle Student System** Oracle Student System is a student information management application. School officials use Oracle Student System to manage the entire life cycle of a student from inquiry through graduation. School officials also use Oracle Student System to send correspondence, such as a notifications and statements, to a party.

Oracle Student System uses Oracle One-to-One Fulfillment to process single or batch requests via e-mail, fax, and print output channels. The content of the correspondence is stored in Oracle Marketing Encyclopedia System as reusable master documents. The master documents can be personalized using merge fields and queries.

Oracle Student System concurrent processes to generate a fulfillment requests. Oracle Student System also records the status of the fulfillment request in Oracle Customer Interaction History.

For information about Oracle Collections, see *Oracle Student System Implementation Guide* and *Oracle Student System User's Guide*.

**Oracle TeleSales** Oracle TeleSales is a contact management application. Agents use Oracle TeleSales to manage inbound telesales and outbound telemarketing. Agents also use Oracle TeleSales to send correspondence, such as cover letters or collateral items, to a party.

Oracle TeleSales uses Oracle One-to-One Fulfillment to process single requests via e-mail, fax, and print output channels. The content of the correspondence is stored in Oracle Marketing Encyclopedia System as reusable master documents. The master documents can be personalized using merge fields and queries. Collateral items (also called deliverables) are uploaded using Oracle Marketing.

Oracle TeleSales generates a fulfillment request when an agent chooses to send a master document or an electronic collateral item. Oracle TeleSales also records the status of the fulfillment request in Oracle Customer Interaction History.

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

**Oracle TeleService** Oracle TeleService is a problem tracking application. Agents use Oracle TeleService to manage service requests. Agents also use Oracle TeleService to send correspondence, such as a status, to a party.

Oracle TeleService uses Oracle One-to-One Fulfillment to process single requests via e-mail. The content of the correspondence is stored in Oracle Marketing Encyclopedia System as reusable master documents. The master documents can be personalized using merge fields and queries. Seeded templates are used to join master documents and collateral item in a single package.

Oracle TeleService generates a fulfillment request when an agent chooses to send a template. Oracle TeleService also records the status of the fulfillment request in Oracle Customer Interaction History.

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

### 3.3 Conditional Dependencies

Conditional dependencies provide desired functionality to Oracle One-to-One Fulfillment but are not required for Oracle One-to-One Fulfillment to function.

The following conditional dependencies apply to Oracle Interaction Center:

#### **Oracle Marketing**

Oracle Marketing can be used to allow parties to set their contact channels. The Unsubscribe option in the fulfillment server configuration causes the fulfillment server to insert a hypertext link into the content of e-mails that will allow e-mail recipients to modify their contact preferences.

For e-mail requests, the outgoing e-mail contains an embedded URL to a web page. The URL leads to the Contact Preferences page in Oracle Marketing Online. The Contact Preferences page allows the recipient to set contact channels.

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**Note:** Oracle Marketing is required to upload collateral items. Collateral may be included in fulfillment request that are created using Oracle Marketing, Oracle Scripting, Oracle Sales Online, and Oracle TeleSales.

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## 3.4 Related Documentation

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

## 3.5 Installing Oracle One-to-One Fulfillment

You have the following options for installing Oracle One-to-One Fulfillment:

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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 Oracle*MetaLink* 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 OracleMetaLink at <http://metalink.oracle.com>. For information about upgrading Oracle Applications Release 11i using the Maintenance Pack, see Maintenance Pack Release Instructions on OracleMetaLink 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 OracleMetaLink at <http://metalink.oracle.com>. 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 232834.1. Enter the document ID in the Search Field and select the Doc ID option.)

## 3.6 Accessing Oracle One-to-One Fulfillment

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/jtflogin.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`

### 3.6.1 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.

### 3.6.2 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 One-to-One Fulfillment.

Responsibility	Function	Interface
CRM HTML Administration	Assign the JTF_ADMIN_FM role to the user account.	HTML
CRM Resource Manager	Create an employee (if Oracle Human Resource Management System is not installed). Import an employee as a resource.	Forms

<b>Responsibility</b>	<b>Function</b>	<b>Interface</b>
Fulfillment Administrator	Associate output devices with a fulfillment server. Create a fulfillment agent group. Associate a fulfillment agent group with a fulfillment server. Create queries. Create and/or upload master documents. Create fulfillment templates.	HTML
System Administrator	Create a user for administering Oracle One-to-One Fulfillment. Set values for profile options.	Forms
HRMS Manager, for example US HRMS Manager	Create an employee (if Oracle Human Resource Management System is installed).	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 One-to-One Fulfillment. 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"](#)
- [Section 4.3, "Managing a Fulfillment Server"](#)

### 4.1 Implementation Task Sequence

Perform the steps in the following table to implement Oracle One-to-One Fulfillment. 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	<b>Create an Oracle One-to-One Fulfillment administrator.</b>  You will use this user account to perform the remaining steps.  See: <a href="#">Section 4.2, "Defining an Administrator"</a>	System Administrator

<b>Step</b>	<b>Required</b>	<b>Description</b>	<b>Responsibility</b>
2	Yes	<b>Define a fulfillment server.</b> See: <a href="#">Section 5.2, "Fulfillment Servers"</a>	Fulfillment Administrator
3	For Collections, Lease Management, Marketing, Scripting, Sales Online, Student System, TeleSales, and TeleService	<b>Add e-mail output channels.</b> See: <a href="#">Section 5.2, "Fulfillment Servers"</a>	Fulfillment Administrator
4	For Collections, Sales Online, Student System, TeleSales, and TeleService	<b>Add fax output channels.</b> See: <a href="#">Section 5.2, "Fulfillment Servers"</a>	Fulfillment Administrator
5	For Collections, Student Systems, TeleSales, and TeleService	<b>Add print output channels.</b> See: <a href="#">Section 5.2, "Fulfillment Servers"</a>	Fulfillment Administrator
6	Yes	<b>Create agent users for the business application.</b> See the implementation guide for the business application.	Varies
7	Yes	<b>Create a fulfillment agent group.</b> <ul style="list-style-type: none"> <li>■ Define an agent group</li> <li>■ Associate the group with a fulfillment server</li> </ul> See: <a href="#">Section 5.3, "Fulfillment Agent Groups"</a>	Fulfillment Administrator
8	For Marketing, Sales Online, and TeleSales (Optional for Scripting)	<b>Create collateral items and upload them using Oracle Marketing.</b> See: <i>Oracle Marketing User Guide</i>	Oracle Marketing Administrator
9	For Collections, Lease Management, Scripting, Sales Online, Student Systems, TeleSales, and TeleService	<b>Create master documents and upload them into Oracle Marketing Encyclopedia System.</b> See: <a href="#">Section 5.5, "MES Master Documents"</a>	Fulfillment Administrator
10	For dynamic content in MES master documents	<b>Create a query in Oracle Marketing Encyclopedia System.</b> See: <a href="#">Section 5.7, "MES Queries"</a>	Fulfillment Administrator

Step	Required	Description	Responsibility
11	For Sales Online and TeleService	<p><b>Create an template in Oracle Marketing Encyclopedia System.</b></p> <ul style="list-style-type: none"> <li>■ Associate one or more master documents with the MES fulfillment template</li> <li>■ Associate one or more collateral items with the MES fulfillment template</li> </ul> <p>See: <a href="#">Section 5.4, "MES Templates"</a></p>	Fulfillment Administrator
12	For Marketing	<p><b>Create templates and upload them into Oracle Content Manager.</b></p> <p>See: <a href="#">Section 5.9, "OCM Templates"</a></p>	Fulfillment Administrator
13	For dynamic content in OCM templates	<p><b>Create a query in Oracle Content Manager.</b></p> <p>See: <a href="#">Section 5.10, "OCM Queries"</a></p>	Fulfillment Administrator
14	For fax and print output channels	<p><b>Integrate Captaris RightFax Enterprise Server with Oracle One-to-One Fulfillment.</b></p> <p>See: <a href="#">Section 6.1, "RightFax Integration"</a></p>	Not applicable
15		<p><b>Start the server using a startup script.</b></p> <p>See: <a href="#">Section 4.3, "Managing a Fulfillment Server"</a></p>	Not applicable

### See Also

- [Section 4.2, "Defining an Administrator"](#)
- [Section 4.3, "Managing a Fulfillment Server"](#)

## 4.2 Defining an Administrator

Perform the steps in the following table to create a user account for administering Oracle One-to-One Fulfillment. The Step 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	<b>Create an Oracle Applications user account and assign responsibilities.</b> See: <a href="#">Section 4.2.1, "Creating a User Account"</a>	System Administration
2	Yes	<b>Assign the JTF_FM_ADMIN role to the user account.</b> See: <a href="#">Section 4.2.2, "Assigning a Role to a User Account"</a>	CRM HTML Administration

### See Also

- [Section 4.1, "Implementation Task Sequence"](#)
- [Section 4.3, "Managing a Fulfillment Server"](#)

## 4.2.1 Creating a User Account

Use the following procedure to create a user account for administering Oracle One-to-One Fulfillment.

### 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 One-to-One Fulfillment, 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>
CRM HTML Administration	Assign the JTF_ADMIN_FM role to the user account.	HTML
CRM Resource Manager	Create an employee (if Oracle Human Resource Management System is not installed). Import an employee as a resource.	Forms
Fulfillment Administrator	Associate output devices with a fulfillment server. Create a fulfillment agent group. Associate a fulfillment agent group with a fulfillment server. Create queries. Create and/or upload master documents. Create fulfillment templates.	HTML
System Administrator	Create a user for administering Oracle One-to-One Fulfillment. Set values for profile options.	Forms
HRMS Manager, for example US HRMS Manager	Create an employee (if Oracle Human Resource Management System is installed).	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 4.2.2, "Assigning a Role to a User Account"](#)

## 4.2.2 Assigning a Role to a User Account

The JTF\_FM\_ADMIN role provides access to the tabs in the Oracle One-to-One Fulfillment administration console. You need the JTF\_FM\_ADMIN role *in addition to* the Fulfillment Administrator responsibility. See [Section 4.2.1, "Creating a User Account"](#) for information about assigning a responsibility to a user account.

Use the following procedure to assign the JTF\_FM\_ADMIN role to a user account.

### Login

HTML Login URL

### Responsibility

CRM HTML Administration

### Prerequisites

- The CRM HTML Administration user must have the JTF\_SYSTEM\_ADMIN\_ROLE to access user maintenance functions.
- The CRM HTML Administration user must have the JTF\_FM\_ADMIN role to assign the role to another user.

### Steps

1. Click the Users tab.
2. Click the Registration subtab.
3. Click the User Maintenance side panel link.

The Users page appears.

4. In the Enter Search Criteria fields, select Username, enter the user name, and then click **Go**.

The matching user names appear.

5. Click a user name hyperlink.

The User Details page appears.

6. Click **Roles**.

The User-Role Mapping page appears.

7. Move JTF\_FM\_ADMIN from the Available Roles list to the Assigned Roles list.

8. Click **Update**.

The User-Role Mapping page refreshes.

### **See Also**

- [Section 4.2.1, "Creating a User Account"](#)

## 4.3 Managing a Fulfillment Server

Perform the steps in the following table to create a startup script for a fulfillment server and control the operation of a fulfillment server. The Step 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 a script for starting the fulfillment server process.</b></p> <p>See: <a href="#">Section 4.3.1, "Creating a Startup Script for the Fulfillment Server"</a></p>	Not applicable
2	No	<p><b>Create a script for controlling a fulfillment server that is running the background.</b></p> <p>See: <a href="#">Section 4.3.2, "Creating a Remote Command Script for the Fulfillment Server"</a></p>	Not applicable

### See Also

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

### 4.3.1 Creating a Startup Script for the Fulfillment Server

---



---

**Note:** A startup script is created when Oracle Applications is installed. The default server identifier is 5000. You can manually edit the startup script.

---



---

Use the following procedure to create a script that will start the fulfillment server and start the fulfillment server.

#### Login

Not applicable

## Responsibility

Not Applicable

## Prerequisites

- Configure a fulfillment server in the Oracle One-to-One Fulfillment administration console.
- Obtain the server identifier that was assigned to the fulfillment server definition in the administration console. You can find it on the Server tab.
- Obtain the path to the java.exe (JDK) or jre.exe (JRE) file.
- Obtain the path to the database connectivity file.

## Steps

1. Use a text editor, such as Microsoft Notepad, to create a text file that will act as the startup script.

Every startup script must have, at a minimum, the following:

- Maximum memory to be allocated by the Java Virtual Machine (JVM)
- Reference to the identifier for the fulfillment server configuration
- Reference to the database connectivity file
- Reference to the executed Java class that runs the fulfillment server

See [Guidelines](#), below, for more information.

---

---

**Note:** Always check for syntax errors, such as misspellings and extra spaces.

---

---

2. If the startup script is for UNIX (a shell script), save the file with a \*.sh extension.
3. If the startup script is for DOS (a batch file), save the file with a \*.bat extension.
4. Save the script to a machine that has access, via a network, to the Oracle Applications environment, the Oracle Applications database, and, if you have CLASSPATH statements in your script, any Java files referenced in those statements.

See [Section 3.1.1.1, "Java Files"](#) for information about necessary Java files and the CLASSPATH parameter.

5. To start the fulfillment server, change to the directory that contains the script and run the script.

See [Appendix B, "Fulfillment Server Commands"](#) for information about operating the fulfillment server from the same command line from which it was started.

See [Section 4.3.2, "Creating a Remote Command Script for the Fulfillment Server"](#) for information about operating the fulfillment server from any command line on the machine that is hosting the fulfillment server.

### Guidelines

The following is a template for a basic UNIX shell script for starting a fulfillment server.

---

---

**Note:** After the exec command, there should be no carriage returns in the script. You can put the parameters on one line or use a back slash (\) at the end of each line to ensure that the parameters are read as a continuous line.

---

---

```
#!/bin/sh

exec <full_path_to_java_or_jre_executable> -mx64m \
-Dengine.ServerID=<server_identifier> \
-Dengine.AOLJ.config=<full_path_to_dbc_file> \
oracle.apps.jtf.fm.FulfillmentServer
```

The following is a template for a basic DOS batch file for starting a fulfillment server.

```
<full_path_to_java_or_jre_executable> -mx64m
-Dengine.ServerID=<server_identifier>
-Dengine.AOLJ.config=<full_path_to_dbc_file>
oracle.apps.jtf.fm.FulfillmentServer
```

The -mx parameter sets the maximum memory that the Java Virtual Machine will allocate to the fulfillment server. The recommended maximum allocation is 64 megabytes or higher. If you get an OutOfMemoryException, then you should increase the maximum allocation. The -ms parameter, which is optional for the fulfillment server, sets the minimum memory allocation.

---

---

**Note:** If you are using `java` (JRE), then add the `-nojit` option to the script. For example, in UNIX,

```
exec <full_path_to_java_or_jre_executable> -mx64m -nojit \
```

This option turns off the "just in time" compiler and allows logged errors to display error line numbers.

---

---

The `engine.ServerID` parameter identifies the configuration that is used when the server is started by the script. A server identifier is assigned when the server configuration (also referred to as a server) is created in the Oracle One-to-One Fulfillment administrative console. Servers and their identifiers are listed on the Server tab. See [Section 5.2.1, "Creating a Fulfillment Server"](#) for more information.

The `engine.AOLJ.config` parameters identifies the full path to the database connectivity file. The database connectivity file contains the connection parameters for the Oracle Applications database. See [Section 3.1.1.3, "Database Connectivity File"](#) for more information.

The executed `oracle.apps.jtf.fm.FulfillmentServer` class is the main class used to run the fulfillment server. The class resides in the `apps.zip` file. The fulfillment server runs on the Admin server and not the Web server.

---

---

**Note:** The `oracle.apps.jtf.fm.FulfillmentServer` class is a wrapper class around the `oracle.apps.jtf.fm.engine.processor.Processor` class. It adds extra debug capability. It is recommended that you use the `oracle.apps.jtf.fm.FulfillmentServer` class. However, the server will, at present, run with the just the `oracle.apps.jtf.fm.engine.processor.Processor` class.

---

---

You can include additional parameters in the startup script. See [Appendix A, "Fulfillment Server Startup Script Parameters"](#) for more information.

### See Also

- [Section 4.3.2, "Creating a Remote Command Script for the Fulfillment Server"](#)

## 4.3.2 Creating a Remote Command Script for the Fulfillment Server

The remote command script allows you to interact with the fulfillment server without the need to maintain the original command prompt used to start the server. When you want to issue a command, you type the name of the remote command script and the command.

The fulfillment server is configured in the startup script to monitor a port for remote commands. The port is specified in both the startup script for the server and the remote command script. The remote command script runs on the same machine as the fulfillment server or on a machine that is on the same network as the fulfillment server.

When a command is sent through the remote command script, the machine that issued the command waits for a response and terminates activity after it receives the response. To prevent unnecessary workload for the fulfillment server, the machine that issues the remote command only retains a connection to the fulfillment server for the duration of the remote command.

Use the following procedure to create a remote command script and operate a running fulfillment server by remote command.

### Login

Not applicable

### Responsibility

Not Applicable

### Prerequisites

- Identify an available port for sending commands to the fulfillment server via the startup script. The port must be specified in the remote command script and the startup script. For assistance, contact your Oracle Applications system administrator or database administrator.

### Steps

1. Stop ([kill](#)) the fulfillment server if it is running.
2. Use a text editor, such as Microsoft Notepad, to add the [engine.CommandPort](#) parameter to the startup script.

The `engine.CommandPort` flag is used to identify the port number, on the machine that is hosting the fulfillment server, that the fulfillment server will monitor for remote commands.

In a UNIX startup script, add:

```
-Engine.CommandPort=<port_number> /
```

In a DOS startup script, add:

```
-Engine.CommandPort=<port_number>
```

See [Section 4.3.1, "Creating a Startup Script for the Fulfillment Server"](#) for information about startup scripts.

3. Use a text editor to create a separate text file that will act as the remote command script.

Every remote command script must have, at a minimum, the following:

- Reference to the executed Java class that runs the remote monitor, an internal monitor in the fulfillment server
- A port for sending commands to the fulfillment server

Optionally, if the remote command script will reside on a machine other than the machine that is hosting the fulfillment server, then you must also specify the name of the machine.

See [Guidelines](#), below, for more information.

---

---

**Note:** Always check for syntax errors, such as misspellings and extra spaces.

---

---

4. If the remote command script is for UNIX (a shell script), save the file with a `*.sh` extension.
5. If the remote command script is for DOS (a batch file), save the file with a `*.bat` extension.
6. Start the fulfillment server (run the startup script).
7. At a different command prompt, send a command using the remote command script.

For example, enter

```
<remote_command_script_name> <command>
```

8. Verify that the fulfillment server received the command.

### Guidelines

The following is an example of a UNIX shell script for issuing commands to a fulfillment server that is running in the background.

```
#!/bin/csh  
  
java oracle.apps.jtf.fm.engine.remote.RemoteCommand -port <port_number> [-host  
<remote_hostname>] $*
```

The following is an example of a DOS batch file for issuing commands to a fulfillment server that is running in the background.

```
java oracle.apps.jtf.fm.engine.remote.RemoteCommand -port <port_number> [-host  
<remote_hostname>] %*
```

The value of the port parameter must match the value of the engine.CommandPort parameter in the startup script. If the remote command script is on a machine other than the machine that is hosting the fulfillment server, then specify the name of the machine in the host parameter.

The remote command also works from a command prompt with the following command:

```
java oracle.apps.jtf.fm.engine.remote.RemoteCommand -port <port_number> [-host  
<remote hostname>] <command>
```

### See Also

- [Section 4.3.1, "Creating a Startup Script for the Fulfillment Server"](#)

---

## Administration Tasks

This chapter describes task-based procedures for administering Oracle One-to-One Fulfillment. Topics include:

- [Section 5.1, "Oracle One-to-One Fulfillment Home"](#)  
Use the Home tab to find a specific record.
- [Section 5.2, "Fulfillment Servers"](#)  
Use the Server tab to create and configure a fulfillment server.
- [Section 5.3, "Fulfillment Agent Groups"](#)  
Use the Group tab to create a fulfillment agent group and assign the fulfillment agent group to a fulfillment server.
- [Section 5.4, "MES Templates"](#)  
Use the Template subtab to manage templates in Oracle Marketing Encyclopedia.
- [Section 5.5, "MES Master Documents"](#)  
Use the Master Document subtab to manage master documents in Oracle Marketing Encyclopedia.
- [Section 5.6, "OMO Collateral"](#)  
Use the Collateral subtab to view a list of collateral items available in Oracle Marketing Encyclopedia.
- [Section 5.7, "MES Queries"](#)  
Use the Query subtab to manage queries in Oracle Marketing Encyclopedia.
- [Section 5.8, "MES Query Datasource"](#)

Use the Datasource subtab to download a list of merge fields for an MES query.

- [Section 5.9, "OCM Templates"](#)
- [Section 5.10, "OCM Queries"](#)
- [Section 5.11, "Fulfillment Request Status"](#)
- [Section 5.12, "Fulfillment Request History"](#)
- [Section 5.13, "Fulfillment Request Search"](#)

## 5.1 Oracle One-to-One Fulfillment Home

You can perform the following tasks:

- [Section 5.1.1, "Using the Quick Find Search Feature"](#)

### 5.1.1 Using the Quick Find Search Feature

Use this procedure to find a fulfillment setup item, such as a server or template.

#### **Login**

HTML Login URL

#### **Responsibility**

Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Select any tab in the administration console.
2. From the Quick Find list, select the search type:
  - Group (Fulfillment Agents)
  - Master Document
  - Query
  - Server
  - Status

- Template
  - Employees
  - Groups (Resources)
  - Appointments
  - Tasks
  - Notes
3. In the Quick Find field, enter the search criterion.

You may search for an item using character strings and the wildcard symbol (%). For example, to find servers starting with A, type A%.
  4. Click **Go**.
  5. If you want to view the details of an item in the search results, click an ID hyperlink.

## 5.2 Fulfillment Servers

Use the Server subtab to configure fulfillment servers and output servers.

### Tasks

You can perform the following tasks:

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

## Concepts

- [Fulfillment Server](#)
- [Unsubscribe URL](#)
- [E-Mail Tracking](#)
- [Fulfillment Output Channels](#)
- [Fulfillment Server Startup Scripts](#)

## 5.2.1 Creating a Fulfillment Server

Use this procedure to create and configure a fulfillment server.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

- Install and implement a fulfillment output server.

### Steps

1. Select the Server tab.
2. Select the Server subtab.  
The Servers page appears.
3. Click **Create**.  
The Server Details page appears.
4. Enter the details about the server.
  - a. In the Server Name field, type a name for the server.  
The name will appear in the list of servers on the Servers page. You cannot change this field after the server is saved.
  - b. Optionally, from the Start Time lists, select the hour and minute for the start time.

The start time is the time at which the fulfillment server starts polling the fulfillment request queues in the database. It does not physically start the server. If running, the server will continue to process retrieved fulfillment requests even when it is not polling the database.

- c. Optionally, from the Shutdown Time lists, select the hour and minute for the shutdown time.

The shutdown time is the time at which the fulfillment server stops polling the fulfillment request queues in the database. It does not physically stop the server. If running, the server will continue to process retrieved fulfillment requests even when it is not polling the database.

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

This field is for informational purposes only.

- 5. In the Interaction History area, select the outcome and result that will be recorded in Oracle Interaction History for fulfillment requests processed by the server.
  - a. From the Request Outcome list, select the outcome that you want to associate with a fulfillment request that has been retrieved from the request queue by the fulfillment server.
  - b. From the Request Success Result list, select the result that you want to associate with a fulfillment request that has been successfully processed by the fulfillment server.
  - c. From the Request Failure Result list, select the result that you want to associate with a fulfillment request that has not been successfully processed by the fulfillment server.

- 6. Click **Continue**.

The server is saved and the Email Servers page appears.

- 7. If you want to send fulfillment items via e-mail, set the e-mail server profiles for the fulfillment server and assign one or more e-mail servers to the fulfillment server.
  - a. If you want the fulfillment server to insert a hypertext link into the e-mail content that will allow recipients to access their contact preferences in Oracle Marketing, then select **Unsubscribe**.
  - b. If you want the fulfillment server to track e-mail statistic for batch and mass e-mail requests, then select **Track Email**.

- c. In the Return Address field, type the reply e-mail address for e-mails processed using the fulfillment server.  
If the business application does not provide a reply e-mail address, then the fulfillment server will use this address to complete the fulfillment request. If the recipient replies to the e-mail, then the reply will be sent to this address.
  - d. In the From Address field, type the originating e-mail address for e-mails processed using the fulfillment server.  
If the business application does not provide a originating e-mail address, then the fulfillment server will use this address to complete the fulfillment request. This address will appear in the From field in the e-mail.
  - e. In the Summary of Email Server area, click **Add Email Server**.  
The Create Email Server page appears.
  - f. In the Email Server Name field, type a descriptive name for the e-mail server.  
This name will appear in the list of e-mail servers on the Email Servers page. You cannot change this field after the definition is saved.
  - g. In the Outgoing Mail Server field, type the name of the SMTP server.  
This is the host name of the SMTP server.
  - h. In the Port Number field, type the port number that the fulfillment server will use to communicate with the e-mail server.
  - i. Optionally, in the Description field, type a description of the e-mail server  
This field is for informational purposes only.
  - j. Click **Continue**.  
The Fax Servers page appears.
8. If you want to send fulfillment items via fax, assign one or more fax servers to the fulfillment server.

---

---

**Note:** Oracle One-to-One Fulfillment supports only Captaris RightFax for fax server output.

---

---

- a. Click **Add Fax Server**.

The Create Fax Server page appears.

- b.** In the Fax Server Name field, type a descriptive name for the fax server (for example, Fax 4th Fl Room 1234).

This name will appear in the list of fax servers on the Fax Servers page. You cannot change this field after the definition is saved.

- c.** In the Fax Server field, type the server name (for example, //faxserver.domainname.com).
- d.** In the Prefix field, type the prefix number that must be dialed before the fax number is dialed (for example, 9).
- e.** In the Return Fax Number field, type the fax number that should be used for return faxes.
- f.** Optionally, in the Description field, type a description of the fax server  
This field is for informational purposes only.
- g.** Click **Continue**.

The Printers page appears.

- 9.** If you want to send fulfillment items via printer, assign one or more print servers to the fulfillment server.

---

---

**Note:** Oracle One-to-One Fulfillment supports only Captaris RightFax for print server output.

---

---

- a.** Click **Add Print Server**.

The Create Print Server page appears.

- b.** In the Printer Name field, type a descriptive name for the print server (for example, Printer 4th Fl Room 1234).

This name will appear in the list of print servers on the Printers page. It can be different from the actual printer name or alias. You cannot change this field after the definition is saved.

- c.** In the Print Server field, type the server name (for example, //printserver.domainname.com).
- d.** Optionally, in the Description field, type a description of the print server  
This field is for informational purposes only.

- e. Click **Done**.

The Servers page appears.

### **See Also**

- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

## **5.2.2 Setting the Server Start and Shutdown Time**

Use this procedure to set the start and shutdown time for the fulfillment server. The start and shutdown time indicate the time period when fulfillment server polls the fulfillment request queues in the database. It does not physically start or stop the server. You may wish to set a start and shutdown time if you do not want the fulfillment server to process fulfillment requests 24 hours a day.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Server tab.

2. Click the Server subtab.

The Servers page appears.

3. Click a fulfillment server name hyperlink.

The Server Details page appears.

4. From the Start Time lists, select the hour and minute for the start time.

The start time is the time at which the fulfillment server starts polling the fulfillment request queues in the database. It does not physically start the server. If running, the server will continue to process retrieved fulfillment requests even when it is not polling the database.

5. From the Shutdown Time lists, select the hour and minute for the shutdown time.

The shutdown time is the time at which the fulfillment server stops polling the fulfillment request queues in the database. It does not physically stop the server. If running, the server will continue to process retrieved fulfillment requests even when it is not polling the database.

6. Click **Continue**.

The start and shutdown times are saved.

### See Also

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

## 5.2.3 Setting the Interaction History Outcomes and Results

Use this procedure to set the interaction history outcomes and results for processed fulfillment requests.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Server tab.
2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. From the Request Outcome list, select the outcome that you want to associated with a fulfillment request that has been retrieved from the request queue by the fulfillment server.
5. From the Request Success Result list, select the result that you want to associate with a fulfillment request that has been successfully processed by the fulfillment server.
6. From the Request Failure Result list, select the result that you want to associate with a fulfillment request that has not been successfully processed by the fulfillment server.
7. Click **Continue**.  
The outcome and results are saved.

### See Also

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)

- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

### **See Also**

## **5.2.4 Enabling the Unsubscribe URL in E-Mail Fulfillment Requests**

Use this procedure to enable the fulfillment server to insert a hypertext link into the e-mail content that will allow recipients to access their contact preferences in Oracle Marketing.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Server tab.
2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. In the side panel, click **Email Servers**.

The Email Servers page appears.

5. Select **Unsubscribe**.
6. Click **Update**.

**See Also**

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

## 5.2.5 Enabling Tracking for E-Mail Fulfillment Requests

Use this procedure to enable the fulfillment server to track e-mail statistic for batch and mass e-mail requests.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Server tab.
2. Click the Server subtab.

The Servers page appears.

3. Click a fulfillment server name hyperlink.

The Server Details page appears.

4. In the side panel, click **Email Servers**.

The Email Servers page appears.

5. Select **Track Email**.

6. Click **Update**.

### **See Also**

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

### **See Also**

## **5.2.6 Assigning an E-Mail Server to a Fulfillment Server**

Use this procedure to assign an e-mail server to a fulfillment server.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

## Prerequisites

None

## Steps

1. Click the Server tab.
2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. In the side panel, click **Email Servers**.  
The Email Servers page appears.
5. In the Summary of Email Server area, click **Add Email Server**.  
The Create Email Server page appears.
6. In the Email Server Name field, type the name of the e-mail server.  
You cannot change this field after the definition is saved.
7. In the Outgoing Mail Server field, type the name of the SMTP server.  
This is the host name of the SMTP server.
8. In the Port Number field, type the port number that the fulfillment server will use to communicate with the e-mail server.
9. Optionally, in the Description field, type a description of the e-mail server  
This field is for informational purposes only.
10. Click **Save**.  
The Email Servers page appears.

## See Also

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)

- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

## 5.2.7 Assigning a Fax Server to a Fulfillment Server

Use this procedure to assign a fax server to a fulfillment server.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Server tab.
2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. In the side panel, click **Fax Servers**.  
The Fax Servers page appears.
5. Click **Add Fax Server**.  
The Create Fax Server page appears.
6. In the Fax Server Name field, type a descriptive name for the fax server (for example, Fax 4th Fl Room 1234).

This name will appear in the list of fax servers on the Fax Servers page. You cannot change this field after the definition is saved.

7. In the Fax Server field, type the server name (for example, //faxserver.domainname.com).
8. In the Prefix field, type the prefix number that must be dialed before the fax number is dialed (for example, 9).
9. In the Return Fax Number field, type the fax number that should be used for return faxes.
10. Optionally, in the Description field, type a description of the fax server  
This field is for informational purposes only.
11. Click **Save**.

The Fax Servers page appears.

### **See Also**

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

## **5.2.8 Assigning a Print Server to a Fulfillment Server**

Use this procedure to assign a print server to a fulfillment server.

### **Login**

HTML Login URL

## Responsibility

Fulfillment Administrator

## Prerequisites

None

## Steps

1. Click the Server tab.
2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. In the side panel, click **Printers**.  
The Printers page appears.
5. Click **Add Print Server**.  
The Create Print Server page appears.
6. In the Printer Name field, type a descriptive name for the print server (for example, Printer 4th Fl Room 1234).  
This name will appear in the list of print servers on the Printers page. It can be different from the actual printer name or alias. You cannot change this field after the definition is saved.
7. In the Print Server field, type the server name (for example, //printserver.domainname.com).
8. Optionally, in the Description field, type a description of the print server  
This field is for informational purposes only.
9. Click **Save**.  
The Printers page appears.

## See Also

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)

- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

### **See Also**

## **5.2.9 Removing an E-Mail Server from a Fulfillment Server**

Use this procedure to remove an e-mail server from a fulfillment server.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Server tab.
2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. In the side panel, click **Email Servers**.  
The Email Servers page appears.

5. In the Summary of Email Server area, select the Remove box for the e-mail server that you want to remove.
6. Click **Update**.

The e-mail server is removed from the fulfillment server and the Email Servers page is refreshes.

**See Also**

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)
- [Section 5.2.11, "Removing a Print Server from a Fulfillment Server"](#)

## 5.2.10 Removing a Fax Server from a Fulfillment Server

Use this procedure to remove a fax server from a fulfillment server.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Server tab.

2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. In the side panel, click **Fax Servers**.  
The Fax Servers page appears.
5. Select the Remove box for the fax server that you want to remove.
6. Click **Update**.  
The fax server is removed from the fulfillment server and the Fax Servers page is refreshes.

**See Also**

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)

### 5.2.11 Removing a Print Server from a Fulfillment Server

Use this procedure to remove a print server from a fulfillment server.

**Login**

HTML Login URL

## Responsibility

Fulfillment Administrator

## Prerequisites

None

## Steps

1. Click the Server tab.
2. Click the Server subtab.  
The Servers page appears.
3. Click a fulfillment server name hyperlink.  
The Server Details page appears.
4. In the side panel, click **Printers**.  
The Printers page appears.
5. Select the Remove box for the print server that you want to remove.
6. Click **Update**.  
The print server is removed from the fulfillment server and the Printers page refreshes.

## See Also

- [Section 5.2.1, "Creating a Fulfillment Server"](#)
- [Section 5.2.2, "Setting the Server Start and Shutdown Time"](#)
- [Section 5.2.3, "Setting the Interaction History Outcomes and Results"](#)
- [Section 5.2.4, "Enabling the Unsubscribe URL in E-Mail Fulfillment Requests"](#)
- [Section 5.2.5, "Enabling Tracking for E-Mail Fulfillment Requests"](#)
- [Section 5.2.6, "Assigning an E-Mail Server to a Fulfillment Server"](#)
- [Section 5.2.7, "Assigning a Fax Server to a Fulfillment Server"](#)
- [Section 5.2.8, "Assigning a Print Server to a Fulfillment Server"](#)
- [Section 5.2.9, "Removing an E-Mail Server from a Fulfillment Server"](#)
- [Section 5.2.10, "Removing a Fax Server from a Fulfillment Server"](#)

## 5.3 Fulfillment Agent Groups

Use the Group subtab to Use the Group tab to create a fulfillment agent group and assign the fulfillment agent group to a fulfillment server.

### Tasks

You can perform the following tasks:

- [Section 5.3.1, "Creating an Agent Group"](#)
- [Section 5.3.2, "Adding an Agent to a Group"](#)
- [Section 5.3.3, "Removing an Agent from a Group"](#)
- [Section 5.3.4, "Assigning a Fulfillment Agent Group to a Fulfillment Server"](#)

### Concepts

- [Agent Groups](#)

### 5.3.1 Creating an Agent Group

Use this procedure to define a group of agents for fulfillment processing.

#### Login

HTML Login URL

#### Responsibility

Fulfillment Administrator

#### Prerequisites

- Create user accounts for agents.

---

---

**Note:** Each fulfillment agent group must be linked to a fulfillment server. However, if you have not created a fulfillment server, you can return to the Group tab and select a fulfillment server later.

---

---

#### Steps

1. Click the Group tab.
2. Click the Groups subtab.

The Groups page appears.

**3. Click **Create**.**

The Create Group page appears.

**4. In the Group Name field, enter a unique name for the group.**

You cannot change this field after the server is saved.

**5. Optionally, in the Description field, enter a description of the group.**

This field is for informational purposes only.

**6. From the Server Name list, select the name of the fulfillment server.**

---

---

**Note:** Each fulfillment agent group must be linked to a fulfillment server. However, if you have not created a fulfillment server, you can return to the Group tab and select a fulfillment server later.

---

---

**7. Add agents to the group.**

**a. In the Agent area, in the Name column, type a user name or other search criteria, and then click **Go**.**

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

If you want to clear the search criteria, then click the Clear button in the Remove column.

The Select Agent page appears. The search results are listed.

**b. If you want to modify your search, type new search criteria in the Search field and then click **Search**.**

**c. Click a user name.**

The Create Group page appears. The user name appears in the Agents area.

**8. Click **Create**.**

The Groups page appears.

**See Also**

- [Section 5.3.2, "Adding an Agent to a Group"](#)
- [Section 5.3.3, "Removing an Agent from a Group"](#)

- [Section 5.3.4, "Assigning a Fulfillment Agent Group to a Fulfillment Server"](#)

## 5.3.2 Adding an Agent to a Group

Use this procedure to add an agent to a fulfillment agent group.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Group tab.
2. Click the Groups subtab.  
The Groups page appears.
3. Click a group name.  
The Group Detail page appears.
4. In the Agent area, in the Name column, type a user name or other search criteria, and then click **Go**.  
  
You may search for a user name using character strings and the wildcard symbol (%). For example, to find user names starting with A, type A%.  
  
If you want to clear the search criteria, then click the Clear button in the Remove column.  
  
The Select Agent page appears. The search results are listed.
5. If you want to modify your search, type new search criteria in the Search field and then click **Search**.
6. Click a user name.  
The Create Group page appears. The user name appears in the Agents area.
7. Click **Update**.

**See Also**

- [Section 5.3.1, "Creating an Agent Group"](#)
- [Section 5.3.3, "Removing an Agent from a Group"](#)
- [Section 5.3.4, "Assigning a Fulfillment Agent Group to a Fulfillment Server"](#)

### 5.3.3 Removing an Agent from a Group

Use this procedure to remove an agent to a fulfillment agent group.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Group tab.
2. Click the Groups subtab.  
The Groups page appears.
3. Click a group name.  
The Group Detail page appears.
4. In the Agent area, select the Remove box for the agent that you want to remove from the agent group.
5. Click **Update**.  
The agent is removed from the agent group and the Groups page appears.

**See Also**

- [Section 5.3.1, "Creating an Agent Group"](#)
- [Section 5.3.2, "Adding an Agent to a Group"](#)
- [Section 5.3.4, "Assigning a Fulfillment Agent Group to a Fulfillment Server"](#)

### 5.3.4 Assigning a Fulfillment Agent Group to a Fulfillment Server

Use this procedure to assign a fulfillment agent group to a fulfillment server.

#### Login

HTML Login URL

#### Responsibility

Fulfillment Administrator

#### Prerequisites

- Create user accounts for agents.
- [Create a fulfillment agent group.](#)
- [Configure a fulfillment server.](#)

#### Steps

1. Click the Group tab.
2. Click the Groups subtab.  
The Groups page appears.
3. Click a group name.  
The Group Detail page appears.
4. From the Server Name list, select a fulfillment server.
5. Click **Update**.

#### See Also

- [Section 5.3.1, "Creating an Agent Group"](#)
- [Section 5.3.2, "Adding an Agent to a Group"](#)
- [Section 5.3.3, "Removing an Agent from a Group"](#)

## 5.4 MES Templates

Use the Template subtab to manage groupings of MES master documents and OMO collateral items. The template is stored in Oracle Marketing Encyclopedia System.

**Tasks**

You can perform the following tasks:

- [Section 5.4.1, "Creating an MES Template"](#)
- [Section 5.4.2, "Assigning a Master Document to an MES Template"](#)
- [Section 5.4.3, "Assigning Collateral to an MES Template"](#)
- [Section 5.4.4, "Updating an MES Template"](#)
- [Section 5.4.5, "Removing a Master Document from an MES Template"](#)
- [Section 5.4.6, "Removing Collateral from an MES Template"](#)

**Concepts**

- [MES Templates](#)

## 5.4.1 Creating an MES Template

Use this procedure to create a grouping of MES master documents and Oracle Marketing collateral items (also called deliverables).

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

Create master document.

**Steps**

1. Click the Template tab.
2. Click the Template subtab.  
The Templates page appears.
3. Click **Create**.  
The Create Template page appears.
4. Enter the details about the template.

- a. In the Template Name field, type a unique name for the template.
  - b. From the Status list, choose the status of the template.  
You have the following options:
    - \* Active: The template is available for fulfillment requests.
    - \* Inactive: The template is not available for fulfillment requests.
  - c. Optionally, in the Description, type a description of the template.  
This field is for informational purposes only.
  - d. Optionally, in the Campaign field, type the name of a marketing campaign that you want to associate with the template.
  - e. Click **Continue**.  
The Template Master Document window opens.
5. Add one or more master documents to the template.
  - a. In the Master Documents area, in the Name column, type a master document name or other search criteria, and then click **Go**.  
You may search for a master document using character strings and the wildcard symbol (%). For example, to find master documents starting with A, A%.  
If you want to clear the search criteria, then click the **Clear** button in the Remove column.  
The Select Master Document page appears. The search results are listed.
  - b. If you want to modify your search, type new search criteria in the Search field and then click **Search**.
  - c. Click a master document name.  
The View Template page appears.
  - d. Click **Update**.  
The Template page appears.
6. Optionally, add one or more collateral to the template,
  - a. In the Collateral area, in the Name column, type a collateral name or other search criteria, and then click **Go**.

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

If you want to clear the search criteria, then click the **Clear** button in the Remove column.

The Select Master Document page appears. The search results are listed.

- b. If you want to modify your search, type new search criteria in the Search field and then click **Search**.

- c. Click a collateral name.

The View Template page appears.

- d. Click **Done**.

The Template page appears.

### **See Also**

- [Section 5.4.2, "Assigning a Master Document to an MES Template"](#)
- [Section 5.4.3, "Assigning Collateral to an MES Template"](#)
- [Section 5.4.4, "Updating an MES Template"](#)
- [Section 5.4.5, "Removing a Master Document from an MES Template"](#)
- [Section 5.4.6, "Removing Collateral from an MES Template"](#)

## **5.4.2 Assigning a Master Document to an MES Template**

Use this procedure to associate a master document with an MES template.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

- Create a fulfillment template.
- Create a master document.

### Steps

1. Click the Template tab.

2. Click the Template subtab.

The Templates page appears.

3. Click a template name.

4. In the side panel, click Master Documents.

The View Template page appears.

5. In the Master Documents area, in the Name column, type a master document name or other search criteria, and then click **Go**.

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

If you want to clear the search criteria, then click the **Clear** button in the Remove column.

The Select Master Document page appears. The search results are listed.

6. If you want to modify your search, type new search criteria in the Search field and then click **Search**.

7. Click a master document name.

The View Template page appears.

8. Click **Update**.

The Template page appears.

### See Also

- [Section 5.4.1, "Creating an MES Template"](#)
- [Section 5.4.3, "Assigning Collateral to an MES Template"](#)
- [Section 5.4.4, "Updating an MES Template"](#)
- [Section 5.4.5, "Removing a Master Document from an MES Template"](#)
- [Section 5.4.6, "Removing Collateral from an MES Template"](#)

## 5.4.3 Assigning Collateral to an MES Template

Use this procedure to associate a collateral item with an MES template.

## Login

HTML Login URL

## Responsibility

Fulfillment Administrator

## Prerequisites

- Create a fulfillment template.
- Create collateral.

## Responsibility

Fulfillment Administrator

## Steps

1. Click the Template tab.
2. Click the Template subtab.  
The Templates page appears.
3. Click a template name.
4. In the side panel, click Collateral.  
The View Template page appears.
5. In the Collateral area, in the Name column, type a collateral name or other search criteria, and then click **Go**.  
  
You may search for collateral using character strings and the wildcard symbol (%). For example, to find collateral starting with A, A%.  
  
If you want to clear the search criteria, then click the **Clear** button in the Remove column.  
  
The Select Master Document page appears. The search results are listed.
6. If you want to modify your search, type new search criteria in the Search field and then click **Search**.
7. Click a collateral name.  
The View Template page appears.
8. Click **Done**.

The Template page appears.

**See Also**

- [Section 5.4.1, "Creating an MES Template"](#)
- [Section 5.4.2, "Assigning a Master Document to an MES Template"](#)
- [Section 5.4.4, "Updating an MES Template"](#)
- [Section 5.4.5, "Removing a Master Document from an MES Template"](#)
- [Section 5.4.6, "Removing Collateral from an MES Template"](#)

## 5.4.4 Updating an MES Template

Use this procedure to update an MES template.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Template tab.
2. Click the Template subtab.  
The Templates page appears.
3. Click a template name hyperlink.  
The View Template page appears.
4. From the Status list, select the status of the template.  
You have the following options:
  - Active: The template is available for fulfillment requests.
  - Inactive: The template is not available for fulfillment requests.

5. Optionally, in the Template Description field, type a description about the template.  
This field is for informational purposes only.
6. Optionally, in the Campaign field, type the name of the campaign associated with this fulfillment template.
7. Click **Update**.

**See Also**

- [Section 5.4.1, "Creating an MES Template"](#)
- [Section 5.4.2, "Assigning a Master Document to an MES Template"](#)
- [Section 5.4.3, "Assigning Collateral to an MES Template"](#)
- [Section 5.4.5, "Removing a Master Document from an MES Template"](#)
- [Section 5.4.6, "Removing Collateral from an MES Template"](#)

## 5.4.5 Removing a Master Document from an MES Template

Use this procedure to remove a master document from an MES template.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Template tab.
2. Click the Template subtab.  
The Templates page appears.
3. Click a template name.
4. In the side panel, click **Master Documents**.

The View Template page appears.

5. Select the Remove box for the master document that you want to remove from the fulfillment template.
6. Click **Update**.

The master document is disassociated from the fulfillment template and the Master Document page is refreshed.

### **See Also**

- [Section 5.4.1, "Creating an MES Template"](#)
- [Section 5.4.2, "Assigning a Master Document to an MES Template"](#)
- [Section 5.4.3, "Assigning Collateral to an MES Template"](#)
- [Section 5.4.4, "Updating an MES Template"](#)
- [Section 5.4.6, "Removing Collateral from an MES Template"](#)

## **5.4.6 Removing Collateral from an MES Template**

Use this procedure to disassociate a collateral item from an MES template.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Template tab.
2. Click the Template subtab.  
The Templates page appears.
3. Click a template name.
4. In the side panel, click **Collateral**.

The View Template page appears.

5. Select the Remove box for the collateral that you want to disassociate from the fulfillment template.
6. Click **Update**.

The collateral is disassociated from the fulfillment template and the Master Document page is refreshed.

### **See Also**

- [Section 5.4.1, "Creating an MES Template"](#)
- [Section 5.4.2, "Assigning a Master Document to an MES Template"](#)
- [Section 5.4.3, "Assigning Collateral to an MES Template"](#)
- [Section 5.4.4, "Updating an MES Template"](#)
- [Section 5.4.5, "Removing a Master Document from an MES Template"](#)

## **5.5 MES Master Documents**

Use the Master Document subtab to manage documents that are stored in Oracle Marketing Encyclopedia System. The content in the document becomes the body of the fulfillment e-mail or fax.

### **Tasks**

You can perform the following tasks:

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)
- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## Concepts

- [MES Master Documents](#)
- [Document Editor](#)
- [Queries](#)

## 5.5.1 Creating an MES Master Document Using the Editor

Use this procedure to create a master document using the text editor in Oracle One-to-One Fulfillment. The master document will be saved in Oracle Marketing Encyclopedia System.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

- If the body of the fulfillment document will contain merge fields, then create an OCM query. See [Section 5.7.1, "Creating an MES Query"](#) for more information.

### Steps

1. Click the Template tab.
2. Click the Master Document subtab.  
The Master Document page appears.
3. Click **Create and Upload**.  
The Master Document Editor page appears.
4. In the Master Document Name field, type a unique name for the master document.

When you save the document, the body of the fulfillment document will be saved with this name (for example, name .htm). In addition, the name will appear in list of document in Oracle One-to-One Fulfillment and the business application. You cannot change this field after the document is saved.

5. If you want to compose the master document using plain text, click the **Change to Plain Text Mode** hyperlink.

6. If you want to compose the master document using formatted text, click the **Change to Rich Text Mode** hyperlink.

A formatting tool bar appears.
7. If you want to insert a merge field derived from a query, then do the following:
  - a. In the SQL Merge Field field, click **Create Query**.

The SQL Editor page appears.
  - b. In the Query Name field, type a unique name for the query.

You cannot change this field after the server is saved.
  - c. Optionally, in the Query Description field, enter a description of the query.

This field is for informational purposes only.
  - d. In the SQL Query field, type the SQL statement.
  - e. Click **Validate SQL and Save**.

If the syntax is valid, the SQL Editor page closes and the Master Document Editor page refreshes. The text of the query appears in the SQL Query field. The aliases (or columns, if there are no aliases) in the query appear in the SQL merge field list. The query is saved in Oracle Marketing Encyclopedia System and appears in the Query list.

If you want to edit the SQL statement, click the **Edit** hyperlink.

Merge fields are the fields available from the query.
  - f. From the SQL Merger Field list, select a merge field based on the SQL statement.
  - g. Place the cursor in the document area.
  - h. Click **Insert**.
8. If you want to manually create a merge field, then in the Custom Merge Field, type a merge field from the query and then click **Insert**.

The merge field is inserted into the document.
9. Click **Save**.

The Master Documents page appears. The master document appears in the list and if a query was created when the master document was created, the query appears in the Query list. The document is saved as an .htm file.

### See Also

- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)
- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## 5.5.2 Creating an MES Master Document Using Microsoft Word

Use this procedure to create a master document using Microsoft Word that you can upload to Oracle Marketing Encyclopedia System.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. If you have not already done so, [create a query](#) that will select the data (for example, first name and last name) that you want to merge into the document.  
See [Section 5.7.1, "Creating an MES Query"](#) for more information.
2. If you have not already done so, [create a data source file](#) from the query.  
See [Section 5.8.1, "Creating a Datasource File from an MES Query"](#) for more information.
3. In Microsoft Word, set up a mail merge.

---

---

**Note:** The following procedures are for Microsoft Word 2000. You may have to deviate from these procedures if you are using a different version of Microsoft Word.

---

---

- a. Choose **Tools > Mail Merge**.  
The Mail Merge Helper window appears.
  - b. Click **Create** and choose **Form Letters**.
  - c. If you want to use the currently open document, click **Active Window**.
  - d. If you want to create a new document, click **New Main Document**.
  - e. Click **Get Data** and choose **Header Options**.  
The Header Options window appears.
  - f. Click **Open**.  
The Open Header Source window appears.
  - g. Locate and select the data source file.
  - h. Click **Open**.  
The Header Record Delimiters window appears.
  - i. Click **OK**.
  - j. In the Mail Merge Helper window, click **Close**.
4. In Microsoft Word, create the content of the document.
    - a. If you want to insert a merge field, click **Insert Merge Field** in the Mail Merge toolbar and then select the field.
  5. Save the template as an .htm or .html file.
    - a. Choose **File > Save As Web Page**.  
The Save As window appears.
    - b. Specify the location and name of the file.
    - c. Click **Save**.
  6. [Upload the file](#) to Oracle Marketing Encyclopedia System.  
See [Section 5.5.3, "Uploading an MES Master Document"](#) for more information.

### See Also

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)
- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## 5.5.3 Uploading an MES Master Document

Use this procedure to upload a document to the Oracle Marketing Encyclopedia System as a master document.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Template tab.
2. Click the Master Document subtab.  
The Master Document page appears.
3. Click **Upload**.  
The Update Master Document page appears.
4. In the Filename field, click the **Browse** button to navigate to the directory that contains the document.

Note that the name of the file is the name of the document that will appear in the Master Documents list. You will not be able to change this name later.

5. Select the master document.
6. Click **Upload**.  
The Update Master Document page refreshes.
7. Optionally, in the Cover Letter Description field, type a description of the cover letter.
8. Optionally, from the Query list, select the query that you want to associate with the master document.
9. Click **Upload**.  
The Master Document page appears.

**See Also**

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)
- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## 5.5.4 Updating an MES Master Document

You cannot update a document that has been uploaded to Oracle Marketing Encyclopedia System. You must upload the document again. The document will have a unique numerical identifier -- even if it has the same name as a previously uploaded document. Therefore, there may be documents with the same name in the list of MES master documents.

**See Also**

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)

- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)
- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## 5.5.5 Viewing an MES Master Document

Use this procedure to view an MES master document.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Template tab.
2. Click the Master Document subtab.  
The Master Document page appears.
3. Click a master document name hyperlink.
4. If the document is an .html file, then the file appears in a new browser window.
5. If the document is a .zip file, then a File Download window appears.  
You can open or save the .zip file.

### See Also

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)

- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## 5.5.6 Downloading an MES Master Document

Use this procedure to download an MES master document to a local file system.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Template tab.
2. Click the Master Document subtab.  
The Master Document page appears.
3. Right-click a master document name hyperlink.  
You can open or save the file.

### See Also

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## 5.5.7 Assigning a Query to an MES Master Document

Use this procedure to assign a query to an MES master document.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Template tab.
2. Click the Master Document subtab.  
The Master Document page appears.
3. From the Query list, select a query.

### **See Also**

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)
- [Section 5.5.8, "Removing a Query From an MES Master Document"](#)

## **5.5.8 Removing a Query From an MES Master Document**

Use this procedure to remove a query from an MES master document.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Template tab.
2. Click the Master Document subtab.  
The Master Document page appears.
3. From the Query list, select **No Query**.

**See Also**

- [Section 5.5.1, "Creating an MES Master Document Using the Editor"](#)
- [Section 5.5.2, "Creating an MES Master Document Using Microsoft Word"](#)
- [Section 5.5.3, "Uploading an MES Master Document"](#)
- [Section 5.5.7, "Assigning a Query to an MES Master Document"](#)
- [Section 5.5.4, "Updating an MES Master Document"](#)
- [Section 5.5.5, "Viewing an MES Master Document"](#)
- [Section 5.5.6, "Downloading an MES Master Document"](#)

## 5.6 OMO Collateral

Use the Collateral subtab to view a list of the collateral items (called deliverables in Oracle Marketing) that are available in Oracle Marketing. The collateral item will be attached to the fulfillment e-mail. It is not available via fax or print.

**Concepts**

- [Collateral](#)

## 5.7 MES Queries

Use the Query subtab to manage queries that are stored in Oracle Marketing Encyclopedia System. MES queries supply data for dynamic MES master documents.

## Tasks

You can perform the following tasks:

- [Section 5.7.1, "Creating an MES Query"](#)
- [Section 5.7.2, "Updating a Query"](#)
- [Section 5.7.3, "Viewing Master Documents Associated with an MES Query"](#)

## Concepts

- [Queries](#)

### 5.7.1 Creating an MES Query

Use this procedure to create an MES query.

#### Login

HTML Login URL

#### Responsibility

Fulfillment Administrator

#### Prerequisites

None

#### Steps

1. Click the Query tab.
2. Click the Query subtab.  
The Queries page appears.
3. Click **Create**.  
The Create Query page appears.
4. In the Query Name field, type a unique name for the query.  
You cannot change this field after the query is saved.
5. Optionally, in the Description field, enter a description of the query.  
This field is for informational purposes only.
6. In the SQL Query field, type the SQL SELECT statement.

7. Click **Validate SQL and Save**.

If the syntax of the statement is valid and there are no bind variables, then the Queries page appears.

If there are bind variables, then you will have to supply the bind variable before the query can be saved.

**See Also**

- [Section 5.7.2, "Updating a Query"](#)
- [Section 5.7.3, "Viewing Master Documents Associated with an MES Query"](#)

## 5.7.2 Updating a Query

Use this procedure to update an MES query.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Query tab.
2. Click the Query subtab.  
The Queries page appears.
3. Click a query name hyperlink.  
The Create Query page appears.
4. Optionally, in the Description field, enter a description of the query.  
This field is for informational purposes only.
5. In the SQL Query field, type the SQL SELECT statement.
6. Click **Validate SQL and Save**.

### **See Also**

- [Section 5.7.1, "Creating an MES Query"](#)
- [Section 5.7.3, "Viewing Master Documents Associated with an MES Query"](#)

## **5.7.3 Viewing Master Documents Associated with an MES Query**

Use this procedure to view a list of the master documents that use an MES query.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Query tab.
2. Click the Query subtab.  
The Queries page appears.
3. Click a query name hyperlink.

The Create Query page appears. The master documents that use the query appears in the Documents Using Query section.

### **See Also**

- [Section 5.7.1, "Creating an MES Query"](#)
- [Section 5.7.2, "Updating a Query"](#)

## **5.8 MES Query Datasource**

Use the Datasource subtab to download a list of merge fields for an MES query. The text file can be used by other tools, such a Microsoft Word, to create a master document that can be uploaded to Oracle Marketing Encyclopedia System.

**Tasks**

You can perform the following tasks:

- [Section 5.8.1, "Creating a Datasource File from an MES Query"](#)

**Concepts**

- [Queries](#)

## 5.8.1 Creating a Datasource File from an MES Query

Use this procedure to download a list of merge fields for an MES query.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

Create a query.

**Steps**

1. Click the Query tab.

2. Click the Datasource subtab.

The Create Datasource page appears.

3. From the Query Name list, select a query.

4. Click **Create**.

The data source file is created and the Create Datasource page refreshes. The data source file is a text file with the column headings or aliases.

5. Use the Datasource file hyperlink to download the data source file.

6. To open the data source file, right-click the **Datasource file** link and choose Open.

The Datasource appears in a separate browser window.

1. From the browser File menu, select **Save As**.

2. Choose text file (.txt) as the file type.
3. Navigate to the desired save location.
4. Click **Save**.
5. Close the browser window.
6. To save the data source file, right-click the **Datasource file** link and choose Save Target As.
7. Navigate to the desired save location.
8. Optionally, modify the file name.  
The save type should be Text Document.
9. Click **Save**.

## 5.9 OCM Templates

Use the OCM Template subtab on the Template tab to manage documents that are stored in Oracle Content Manager. The content in the document becomes the body of the fulfillment e-mail or fax.

### Tasks

You can perform the following tasks:

- [Section 5.9.1, "Creating an OCM Template Using the Editor"](#)
- [Section 5.9.2, "Uploading an OCM Template"](#)
- [Section 5.9.3, "Viewing an OCM Template"](#)
- [Section 5.9.4, "Downloading an OCM Template"](#)

### Concepts

- [OCM Templates](#)
- [Document Editor](#)
- [Queries](#)

### 5.9.1 Creating an OCM Template Using the Editor

Use this procedure to create a template using the text editor in Oracle One-to-One Fulfillment. The template will be uploaded to Oracle Content Manager.

---

---

**Note:** Once the template is saved, it is given a status of "Approved" and cannot be updated. If you create a new template with the name as an existing template, it does not overwrite the existing template. Each template has a unique numerical identifier. Therefore, templates with the same name can appear in the list of templates.

---

---

## Login

HTML Login URL

## Responsibility

Fulfillment Administrator

## Prerequisites

- If the body of the OCM template will contain merge fields, then create an OCM query. See [Section 5.10.1, "Creating an OCM Query"](#) for more information.
- If you want to insert a deliverable into the OCM template, then upload the deliverable using Oracle Marketing.
- If you want to attach an attachments to the OCM template, then attach a file to a deliverable using Oracle Marketing.

## Steps

1. Click the Template tab.
2. Click the OCM Template subtab.  
The OCM Templates page appears.
3. Click **Create and Upload**.  
The Create and Upload Template page appears.
4. In the Template Name field, type a unique name for the template.

When you save the template, the body of the fulfillment document will be saved with this name (for example, name .htm). In addition, the name will appear in list of templates in Oracle One-to-One Fulfillment and the business application. You cannot change this field after the template is saved.

5. Optionally, in the Template Description field, enter a description of the template.

This field is for informational purposes only.

6. If you want to compose the body of the document using plain text, click the **Change to Plain Text Mode** hyperlink.

---

---

**Note:** Documents created in plain text mode are saved as .htm files.

---

---

7. If you want to compose the body of the document using formatted text, click the **Change to Rich Text Mode** hyperlink.

A formatting tool bar appears.

8. If you want to insert a merge field into the body of the document, then type a merge field in the Custom Merge Field field and then click **Insert**.

---

---

**Note:** The merge field should be a column name or alias from the query associated with the template.

---

---

The merge field is inserted into the document.

9. If you want to associate a query with the template, then do the following:

---

---

**Note:** Only OCM queries with a status of "Approved" are available.

---

---

- a. In the Query field, click **Go**.

The Search and Select page appears.

- b. In the Query Name field, type a query name or other search criteria and then click **Go**.

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

- c. In the Results area, select an item in the Select column and then click **Select**.

The Search and Select page closes and the item appears in the Query field in the Create and Upload Template page.

10. From the Status list, select the status of the template.

You have the following options:

- Approve

11. If you want to insert one or more deliverables into your document, then do the following.

- a. In the Email Deliverables field, click **Go**.

The Search and Select page appears.

- b. In the Deliverable Name field, type a deliverable name or other search criteria and then click **Go**.

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

- c. In the Results area, select an item in the Select column and then click **Select**.

The Search and Select page closes and the item appears in the Email Deliverables field in the Create and Upload Template page.

- d. Click **Add**.

- e. If you want to remove a deliverable, select a deliverable from the list and then click **Remove**.

12. If you want to attach one or more attachments to your document, then do the following.

- a. In the Attachments field, click **Go**.

The Search and Select page appears.

- b. In the Deliverable Name field, type an attachment name or other search criteria and then click **Go**.

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

- c. In the Results area, select an item in the Select column and then click **Select**.

The Search and Select page closes and the item appears in the Attachments field in the Create and Upload Template page.

- d. Click **Add**.

- e. If you want to remove an attachment, select an attachment from the list and then click **Remove**.

**13. Click Save.**

The OCM Templates page appears. The body of the document is saved as an .htm file.

**See Also**

- [Section 5.9.2, "Uploading an OCM Template"](#)
- [Section 5.9.3, "Viewing an OCM Template"](#)
- [Section 5.9.4, "Downloading an OCM Template"](#)

## 5.9.2 Uploading an OCM Template

Use this procedure to upload the body of a fulfillment document and create a template in Oracle Content Manager.

---

---

**Note:** Once the template is saved, it is given a status of "Approved" and cannot be updated. If you create a new template with the name as an existing template, it does not overwrite the existing template. Each template has a unique numerical identifier. Therefore, templates with the same name can appear in the list of templates.

---

---

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

- Create the body of an OCM template.
- If you want to insert a deliverable into the OCM template, then upload the deliverable using Oracle Marketing.
- If you want to attach an attachments to the OCM template, then attach a file to a deliverable using Oracle Marketing.

**Steps**

1. Click the Template tab.
2. Click the OCM Template subtab.  
The OCM Templates page appears.
3. Click **Upload**.  
The Upload Template page appears.
4. In the Template Name field, type a unique name for the template.  
The body of the document will be saved with this name (for example, name .html). In addition, the name will appear in list of documents in the business application. You cannot change this field after the document is saved.
5. Optionally, in the Template Description field, enter a description of the template.  
This field is for informational purposes only.
6. In the Upload field, click the **Browse** button to navigate to the directory that contains the fulfillment document.

---

---

**Note:** When you upload the file and create a template, this file name will appear in the list of templates in Oracle One-to-One Fulfillment and in the business application. You cannot change this field after the template is saved.

---

---

7. If you want to associate a query with the template, then do the following:

---

---

**Note:** Only OCM queries with a status of "Approved" are available.

---

---

- a. In the Query field, click **Go**.  
The Search and Select page appears.
- b. In the Query Name field, type a query name or other search criteria and then click **Go**.  
You may search for an item using character strings and the wildcard symbol (%). For example, to find items starting with A, type A%.



- d. Click **Add**.
- e. If you want to remove an attachment, select an attachment from the list and then click **Remove**.

11. Click **Save**.

The OCM Templates page appears.

**See Also**

- [Section 5.9.1, "Creating an OCM Template Using the Editor"](#)
- [Section 5.9.3, "Viewing an OCM Template"](#)
- [Section 5.9.4, "Downloading an OCM Template"](#)

### 5.9.3 Viewing an OCM Template

Use this procedure to view the body of a fulfillment document in Oracle Content Manager.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Template tab.
2. Click the OCM Template subtab.  
The OCM Templates page appears.
3. Click a template name hyperlink.  
The Template Information page appears.

**See Also**

- [Section 5.9.1, "Creating an OCM Template Using the Editor"](#)

- [Section 5.9.2, "Uploading an OCM Template"](#)
- [Section 5.9.4, "Downloading an OCM Template"](#)

## 5.9.4 Downloading an OCM Template

Use this procedure to download a template to a local file system.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Template tab.
2. Click the OCM Template subtab.  
The OCM Templates page appears.
3. Right-click a template name hyperlink.  
You can open or save the file.

### See Also

- [Section 5.9.1, "Creating an OCM Template Using the Editor"](#)
- [Section 5.9.2, "Uploading an OCM Template"](#)
- [Section 5.9.3, "Viewing an OCM Template"](#)

## 5.10 OCM Queries

Use the OCM Query subtab to manage queries that are stored in Oracle Content Manager. OCM queries supply data for dynamic OCM templates.

### Tasks

You can perform the following tasks:

- [Section 5.10.1, "Creating an OCM Query"](#)
- [Section 5.10.2, "Updating an OCM Query"](#)
- Approving a Pending Query
- Deleting a Query

### Concepts

- [Queries](#)

## 5.10.1 Creating an OCM Query

Use this procedure to create a query in Oracle Content Manager.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Query tab.
2. Click the OCM Query subtab.  
The Queries page appears.
3. Click **Create**.  
The Create Query page appears.
4. In the Name field, type a unique name for the query.  
You cannot change this field after the query is saved.
5. Optionally, in the Description field, enter a description of the query.  
This field is for informational purposes only.
6. In the SQL Query field, type the SQL SELECT statement.

7. From the status field, select the status of the query.

You have the following options:

- In Progress
- Approve

8. Click **Validate SQL and Save**.

If the syntax is valid and the status is In Progress, then the Create Query refreshes. The query is not saved. You can continue to amend and validate your query. Or you can save you query by changing the status to Approve.

**See Also**

- [Section 5.10.2, "Updating an OCM Query"](#)

## 5.10.2 Updating an OCM Query

Use this procedure to update a pending query in Oracle Content Manager.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Query tab.
2. Click the OCM Query subtab.  
The Queries page appears.
3. Click a query name hyperlink for a pending query.  
The Update Query page appears.
4. Optionally, in the Description field, enter a description of the query.  
This field is for informational purposes only.

5. In the SQL Query field, type the SQL SELECT statement.
6. From the status field, select the status of the query.  
You have the following options:
  - In Progress
  - Approve
7. Click **Validate SQL and Save**.

**See Also**

- [Section 5.10.1, "Creating an OCM Query"](#)

## 5.11 Fulfillment Request Status

Use the Status subtab to view the status of fulfillment requests that have been placed in the request queue, but not yet retrieved by the fulfillment server.

**Tasks**

You can perform the following tasks:

- [Section 5.11.1, "Viewing the Status of a Fulfillment Request"](#)
- [Section 5.11.2, "Canceling a Fulfillment Request"](#)
- [Section 5.11.3, "Deleting a Status Entry from the Status List"](#)

**Concepts**

- [Fulfillment Request Status](#)

### 5.11.1 Viewing the Status of a Fulfillment Request

Use this procedure to view the status of a fulfillment request.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

## Prerequisites

None

## Steps

1. Click the Status tab.
2. Click the Status subtab.  
The Request Status page appears.
3. From the View list, select a view type.

You have the following options:

- Submitted
  - Re-submitted
  - In Process
  - Preview
4. Click a request identifier hyperlink.

The View Status page appears.

If the request is a single e-mail, the View Status page displays:

If the request type is batch or mass e-mail, the View Status page displays:

## See Also

- [Section 5.11.2, "Canceling a Fulfillment Request"](#)
- [Section 5.11.3, "Deleting a Status Entry from the Status List"](#)

## 5.11.2 Canceling a Fulfillment Request

Use this procedure to cancel a fulfillment request in the queue.

---

---

**Note:** Once the fulfillment server retrieves a fulfillment request from the request queue, the fulfillment request cannot be canceled.

---

---

## Login

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Status tab.
2. Click the Status subtab.  
The Request Status page appears.
3. From the View list, select **Submitted** or **Re-Submitted**.
4. In the Action column, click **Cancel**.

**See Also**

- [Section 5.11.1, "Viewing the Status of a Fulfillment Request"](#)
- [Section 5.11.3, "Deleting a Status Entry from the Status List"](#)

### 5.11.3 Deleting a Status Entry from the Status List

Use this procedure to delete a status entry for a fulfillment request.

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Status tab.
2. Click the Status subtab.  
The Request Status page appears.

3. Select the Remove box for the status entry that you want to delete.
4. Click **Delete**.

The selected status entry is removed from the list and the Request Status page refreshes.

### **See Also**

- [Section 5.11.1, "Viewing the Status of a Fulfillment Request"](#)
- [Section 5.11.2, "Canceling a Fulfillment Request"](#)

## **5.12 Fulfillment Request History**

Use the History subtab to view the history of fulfillment requests that have been processed, successfully or unsuccessfully, by a fulfillment server.

### **Tasks**

You can perform the following tasks:

- [Section 5.12.1, "Viewing the Details of a Fulfillment Request"](#)
- [Section 5.12.2, "Re-Submitting a Fulfillment Request"](#)
- [Section 5.12.3, "Forwarding a Fulfillment Request"](#)
- [Section 5.12.4, "Deleting a History Entry from the History List"](#)

### **Concepts**

- [Fulfillment Request History](#)

### **5.12.1 Viewing the Details of a Fulfillment Request**

Use this procedure to view the details of a fulfillment request.

#### **Login**

HTML Login URL

#### **Responsibility**

Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Status tab.
2. Click the History subtab.  
The Request History page appears.
3. From the View list, select a view type.  
You have the following options:
  - Success
  - Partially Successful
  - Canceled
  - Failure
4. Click a request identifier hyperlink.  
The View History page appears.

**See Also**

- [Section 5.12.2, "Re-Submitting a Fulfillment Request"](#)
- [Section 5.12.3, "Forwarding a Fulfillment Request"](#)
- [Section 5.12.4, "Deleting a History Entry from the History List"](#)

## 5.12.2 Re-Submitting a Fulfillment Request

Use this procedure to resubmit a failed fulfillment request.

---

---

**Note:** You can only resubmit a failed request.

---

---

**Login**

HTML Login URL

**Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Status tab.
2. Click the History subtab.  
The Request History page appears.
3. From the View list, select **Failed**.
4. In the Action column, click **Submit**.

### **See Also**

- [Section 5.12.1, "Viewing the Details of a Fulfillment Request"](#)
- [Section 5.12.3, "Forwarding a Fulfillment Request"](#)
- [Section 5.12.4, "Deleting a History Entry from the History List"](#)

## **5.12.3 Forwarding a Fulfillment Request**

Use this procedure to send a *single* fulfillment request to an e-mail address.

### **Login**

HTML Login URL

### **Responsibility**

Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Status tab.
2. Click the History subtab.  
The Request History page appears.
3. From the View list, select a view type.

You have the following options:

- Success
  - Partially Successful
  - Canceled
  - Failure
4. If the request is a single e-mail fulfillment, then do the following:
    - a. Click a request identifier hyperlink.  
The View History page appears.
    - b. In the Forward Request area, type an e-mail address.
    - c. Press Return.  
The fulfillment request is forwarded to the e-mail address.
  5. If the request is a test, batch, or mass e-mail fulfillment, then do the following:
    - a. Click a request identifier hyperlink.  
The View History page appears.
    - b. In the Search the request area, click the hyperlink.  
The Search page appears.
    - c. Search by party identifier or party name for the job that you want to forward.
    - d. In the search results, click the request identifier hyperlink for the job that you want to forward.  
The View History page appears for the job.
    - e. In the Forward Request area, type an e-mail address.
    - f. Press **Return**.  
The fulfillment request is forwarded to the e-mail address.

### **See Also**

- [Section 5.12.1, "Viewing the Details of a Fulfillment Request"](#)
- [Section 5.12.2, "Re-Submitting a Fulfillment Request"](#)
- [Section 5.12.4, "Deleting a History Entry from the History List"](#)

## 5.12.4 Deleting a History Entry from the History List

Use this procedure to delete a history entry for a fulfillment request.

### Login

HTML Login URL

### Responsibility

Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Status tab.
2. Click the History subtab.  
The Request History page appears.
3. From the View list, select a view type.  
You have the following options:
  - Success
  - Partially Successful
  - Canceled
  - Failure
4. Select the Remove box for the history entry that you want to delete.
5. Click **Delete**.  
The selected history entry is removed from the list and the Request History page refreshes.

### See Also

- [Section 5.12.1, "Viewing the Details of a Fulfillment Request"](#)
- [Section 5.12.2, "Re-Submitting a Fulfillment Request"](#)
- [Section 5.12.3, "Forwarding a Fulfillment Request"](#)

## 5.13 Fulfillment Request Search

Use the Search subtab to search for a fulfillment request that has been processed by a fulfillment server.

### Tasks

You can perform the following tasks:

- [Section 5.13.1, "Searching for a Fulfillment Request"](#)

### 5.13.1 Searching for a Fulfillment Request

Use this procedure to search for a fulfillment request.

#### Login

HTML Login URL

#### Responsibility

Fulfillment Administrator

#### Prerequisites

None

#### Steps

1. Click the Status tab.
2. Click the Search subtab.  
The Search page appears.
3. From the list, select the search type.  
You have the following options:
  - Party Identifier: Search by the numerical identifier of the intended recipient.
  - Party Name: Search by the name of the intended recipient.
4. In the field, type the search criteria.
5. Click **Search**.

The search results appear. The list of search result displays the following information about each fulfillment request:

- Party Identifier: The numerical identifier of the intended recipient.
  - Party Name: The name of the intended recipient.
  - History Request Identifier: The numerical identifier of the fulfillment request. All jobs in a batch or mass fulfillment request have the same request identifier.
  - Job: The numerical identifier of the job in the fulfillment request. A batch or mass fulfillment request contains multiple fulfillment request jobs.
  - Outcome Description: The outcome of the fulfillment request.
6. If you want to view the history of a fulfillment request, then click a request identifier hyperlink.

---

# Integration Tasks

## 6.1 RightFax Integration

Topics include:

- [Section 6.1.1, "High Level Integration Steps"](#)
- [Section 6.1.2, "Sending a Fax Fulfillment Request via RightFax"](#)
- [Section 6.1.3, "Sending a Print Fulfillment Request via RightFax"](#)
- [Section 6.1.4, "Troubleshooting the RightFax Integration"](#)

### 6.1.1 High Level Integration Steps

- 1) Install RightFax Enterprise Server v8.0
- 2) Install Fax board driver (RightFax fax board driver CD)
- 3) Install RightFax Integration Module
- 4) Install RightFax Oracle CRM Connector
- 5) Install RightFax XML Interface
- 6) Install RightFax Java API Interface
- 7) Configure IIS to create virtual directory to support rfwebcon.dll
- 8) Copy RFJavaInt.zip from RightFax CD to %JAVA\_TOP
- 9) Get gluecode from Metalink note 207491.1
- 10) Compile RFFaxEnablerImpl.java (and/or RFPrintEnablerImpl.java)
  - a) add RFJavaInt.zip to your classpath
- 11) Add the RFFaxEnablerImpl.class (and/or RFPrintEnablerImpl.class) to apps.zip

## 6.1.2 Sending a Fax Fulfillment Request via RightFax

The design of the Fulfillment Server allows the user to define a fax solution based on a static API call. This fax solution, written in java, will be called from the Server as specified in the startup script. The Server will load the specified class file and associated class files provided that the class exists, with all supporting classes, in the classpath. The Server recognizes the class name from the startup property definition '-Dengine.FaxEnabler=your.fax.Enabler' in the Servers' startup script; the class 'your.fax.Enabler' being the user defined fax solution. This class has to meet two requirements to be used with the Fulfillment Server: 1) It must have a default constructor; one that has no parameters. 2) It must implement the interface 'oracle.apps.jtf.fm.engine.disp.FaxEnabler' (available in the apps.zip file).

The 'oracle.apps.jtf.fm.engine.FaxEnabler' interface has one method:

```
public String faxContents(String Sender,
                          String SenderFax,
                          String SenderPhone,
                          String SenderCompany,
                          String Recipient,
                          String RecipientFax,
                          String RecipientPhone,
                          String RecipientCompany,
                          String Message,
                          HtmlContent [] Contents)
    throws EnablerFailedException;
```

Sender is the person who is sending the fax. This should be defined as an optional field that can take the empty string "" as argument value.

SenderFax is the fax number of the person who is sending the fax. This should be defined as an optional field that can take the empty string "" as argument value.

SenderPhone is the phone number of the person who is sending the fax. . This should be defined as an optional field that can take the empty string "" as argument value.

SenderCompany is the company of the person who is sending the fax. This should be defined as an optional field that can take the empty string "" as argument value.

Recipient is the person who will be receiving the fax. This should be defined as an optional field that can take the empty string "" as argument value.

RecipientFax is the fax number that will be dialed in order to send the fax. This parameter must have a value.

RecipientPhone is the phone number of the person who is to receive the fax. This should be defined as an optional field that can take the empty string "" as argument value.

RecipientCompany is the company of the person who is to receive the fax. This should be defined as an optional field that can take the empty string "" as argument value.

Message is the message that appears on the cover sheet of the fax being sent. This should be defined as an optional field that can take the empty string "" as argument value.

Contents are the actual contents that are to be faxed.

### 6.1.2.1 Sample 'Glue' Source Code

The code, below, should be cut and pasted into a file called RfFaxEnablerImpl.java. It should then be compiled with the 'javac' command into the class file RfFaxEnablerImpl.class. When compiling, make sure that RFJavaInt.zip and apps.zip are in your CLASSPATH. For more information on using 'javac' please go to the website <http://java.sun.com>.

```
package oracle.apps.jtf.fm.engine.rightfax;

import RightFAX.RFaxSubmit;
import RightFAX.RFStatus;
import java.io.*;
import java.util.*;
import oracle.apps.fnd.common.VersionInfo;
import oracle.apps.jtf.fm.debug.Debug;
import oracle.apps.jtf.fm.engine.disp.EnablerFailedException;
import oracle.apps.jtf.fm.engine.disp.FaxEnabler;
import oracle.apps.jtf.fm.engine.disp.HtmlContent;
import oracle.apps.jtf.fm.engine.util.TempFile;

public synchronized class RfFaxEnablerImpl implements FaxEnabler
{
    private static final File TEMP_DIR = new File(
        System.getProperty("fax.TempDir", "tmp"));
```

```
/**
 * @see oracle.apps.jtf.fm.engine.disp.FaxEnabler#faxContents
 */
public final String faxContents(String sSenderIn,
                                String sSenderFaxIn,
                                String sSenderPhoneIn,
                                String sSenderCompanyIn,
                                String sRecipientIn,
                                String sRecipientFaxIn,
                                String sRecipientPhoneIn,
                                String sRecipientCompanyIn,
                                String sMessageIn,
                                HtmlContent[] oAttachmentsIn)
throws EnablerFailedException
{
    String[] oFileNames = new String[oAttachmentsIn.length];
    File[] oFiles = new File[oAttachmentsIn.length];
    FileOutputStream oFout = null;

    try
    {
        for (int i = 0; i < oFiles.length; i++)
        {
            oFiles[i] = new TempFile(TEMP_DIR, oAttachmentsIn[i].getName());
            oFileNames[i] = oFiles[i].getPath();
            oFout = new FileOutputStream(oFiles[i]);
            oFout.write(oAttachmentsIn[i].getRawData());
            oFout.close();
        }
    }
    catch (IOException e)
    {
        throw new EnablerFailedException(e);
    }

    String sFaxId = faxFiles(sSenderIn,
                            sSenderFaxIn,
                            sSenderPhoneIn,
                            sSenderCompanyIn,
                            sRecipientIn,
                            sRecipientFaxIn,
                            sRecipientPhoneIn,
                            sRecipientCompanyIn,
```

```
        sMessageIn,
        oFileNames);

    for (int i = 0; i < oFiles.length; i++)
    {
        oFiles[i].delete();
    }

    return sFaxId;
}

/**
Sends files to the RightFAX fax server to be faxed.
@param sSenderIn is the name of the sender. This is optional and
        hence can be an empty string.
@param sSenderFaxIn is the fax number of the sender. This is
        optional and can also be an empty string.
@param sSenderPhoneIn is the phone number of the sender. This
        is optional and can be an empty string.
@param sSenderCompanyIn is the name of the institution sent from.
        This is optional and can be a blank string.
@param sRecipientIn is the name of the person who will receive
        this fax. This parameter is required.
@param sRecipientFaxIn is the fax number to dial to reach the
        destination. This string includes a few items which are
        dial out prefix like "9" to dial an outside number,
        long distance code like "1" to dial a long distance number,
        area code like "703" to access that area,
        and finally the fax number itself. This parameter is required.
@param sRecipientPhoneIn is the phone number of the person who
        will receive this fax. This is optional and can be an empty string.
@param sRecipientCompanyIn is the name of the institution targeted.
        This is optional and can be a blank string.
@param sMessageIn is an optional message that will be printed on the fax
        cover page.
@param oAttachmentsIn are the files to attach to the fax.
@throws EnablerFailedException if the fax was unsuccessful.
@return the fax identifier.
*/
public final String faxFiles(String sSenderIn,
                            String sSenderFaxIn,
                            String sSenderPhoneIn,
                            String sSenderCompanyIn,
                            String sRecipientIn,
                            String sRecipientFaxIn,
```

```
        String sRecipientPhoneIn,
        String sRecipientCompanyIn,
        String sMessageIn,
        String oAttachmentsIn[])
throws EnablerFailedException
{
    if (Debug.FAX)
    {
        StringBuffer oDebug = new StringBuffer("sending fax>")
            .append(";sender:")
            .append(sSenderIn)
            .append(";sender fax#:")
            .append(sSenderFaxIn)
            .append(";sender phone#:")
            .append(sSenderPhoneIn)
            .append(";sender company:")
            .append(sSenderCompanyIn)
            .append(";recipient:")
            .append(sRecipientIn)
            .append(";recipient fax#:")
            .append(sRecipientFaxIn)
            .append(";recipient phone#:")
            .append(sRecipientPhoneIn)
            .append(";recipient company:")
            .append(sRecipientCompanyIn)
            .append("; note:")
            .append(sMessageIn)
            .append(";files:");

        for (int i1 = 0; i1 < oAttachmentsIn.length; i1++)
        {
            oDebug.append(oAttachmentsIn[i1]).append(" ");
        }

        System.out.println(oDebug.toString());
    }

    RFaxSubmit oSubmit = new RFaxSubmit();

    try
    {
        oSubmit.setTargetURL(System.getProperty("rightfax.FaxServerURL"));
        oSubmit.m_FaxDocument
            .setSenderInfo((sSenderIn != null) ? sSenderIn : "");
    }
}
```

```

        "",
        sSenderCompanyIn,
        "",
        (sSenderPhoneIn != null) ? sSenderPhoneIn : "",
        "",
        "",
        "",
        "",
        "administrator");

oSubmit.m_FaxDocument.addRecipient(
    "",
    sRecipientFaxIn,
    "",
    (sRecipientIn != null) ? sRecipientIn : "",
    (sRecipientCompanyIn != null) ? sRecipientCompanyIn : "",
    "",
    (sRecipientPhoneIn != null) ? sRecipientPhoneIn : "",
    "",
    "",
    "",
    "",
    "",
    "");

oSubmit.m_FaxDocument.setBody(sMessageIn);

for (int i = 0; i < oAttachmentsIn.length; i++)
{
    oSubmit.addAttachment(oAttachmentsIn[i]);
}

Vector oRetList = null;
oRetList = oSubmit.submit();

if (oRetList != null)
{
    int niNumSubmitted = oRetList.size();

    for (int i = 0; i < niNumSubmitted; i++)
    {
        RFStatus rFStatus = (RFStatus)oRetList.elementAt(i);
        System.out.println(
            new StringBuffer("ID: ").append(rFStatus.getID())
                .toString());
        System.out.println(

```

```
        new StringBuffer("Code: ")
        .append(rFStatus.getStatusCode()).toString());
    System.out.println(
    new StringBuffer("Msg: ")
    .append(rFStatus.getStatusMsg()).toString());
    }
}
}
catch (Exception e)
{
    throw new EnablerFailedException(e);
}

return new StringBuffer()
.append("fax_")
.append(System.currentTimeMillis())
.append("_")
.append(System.getProperty("user.timezone", "?"))
.toString();
}
}
```

### 6.1.2.2 Implementing the Glue Code for Fax Requests

Using the glue code for sending faxes via RightFAX requires adding a couple of configuration flags to the Fulfillment Server start script and making sure that RightFAX Java API's and glue code are on the CLASSPATH. The archive file that includes the RightFAX API's, called RFJavaInt.zip, should be included with your RightFAX software. The flags to be included in the Fulfillment Server start script are:

- `engine.FaxEnabler` indicates the class that the FulfillmentServer should use as it's Fax Enabler.
- `rightfax.FaxServerURL` indicates the intranet location of the RightFAX Fax Server.
- `fax.TempDir` (default is 'tmp') indicates the directory where temporary files are to be stored for creating deliverable fax content.

Each flag should appear in the start script with the form '-Dname=value'. An example of this would be '-Dfax.TempDir=c:\temp'. For more information on this, please go to the <http://java.sun.com> website and look for information on Java Properties.

### 6.1.3 Sending a Print Fulfillment Request via RightFax

The design of the Fulfillment Server allows the user to define a print solution based on a static API call. This print solution, written in java, will be called from the Server as specified in the startup script. The Server will load the specified class file and associated class files provided that the class exists, with all supporting classes, in the classpath. The Server recognizes the class name from the startup property definition '-Dengine.PrintEnabler=your.print.Enabler' in the Servers' startup script; the class 'your.print.Enabler' being the user defined print solution. This class has to meet two requirements to be used with the Fulfillment Server: 1) It must have a default constructor; one that has no parameters. 2) It must implement the interface 'oracle.apps.jtf.fm.engine.disp.PrintEnabler' (available in the apps.zip file).

The 'oracle.apps.jtf.fm.engine.PrintEnabler' interface has one method:

```
public String printContents(String PrinterName, HtmlContent[] Contents)
throws EnablerFailedException;
```

PrinterName is the name/alias of the Printer to send the print job to.  
Contents are the actual contents that are to be printed.

#### 6.1.3.1 Sample 'Glue' Source Code

The code, below, should be cut and pasted into a file called RfPrintEnablerImpl.java. . It should then be compiled with the 'javac' command into the class file RfPrintEnablerImpl.class. When compiling, make sure that RFJavaInt.zip and apps.zip are in your CLASSPATH. For more information on using 'javac' please go to the website <http://java.sun.com>.

```
package oracle.apps.jtf.fm.engine.rightfax;

import RightFAX.RFaxSubmit;
import RightFAX.RFStatus;
import java.io.*;
import java.util.*;
import oracle.apps.fnd.common.VersionInfo;
import oracle.apps.jtf.fm.debug.Debug;
import oracle.apps.jtf.fm.engine.disp.EnablerFailedException;
import oracle.apps.jtf.fm.engine.disp.PrintEnabler;
import oracle.apps.jtf.fm.engine.disp.HtmlContent;
import oracle.apps.jtf.fm.engine.util.TempFile;

public synchronized class RfPrintEnablerImpl implements PrintEnabler
```

```
{
    private static final File TEMP_DIR = new File(
        System.getProperty("print.TempDir", "tmp"));

    /**
     * @see oracle.apps.jtf.fm.engine.disp.PrintEnablerImpl#printContents
     */
    public final String printContents(String sPrinterIn,
        HtmlContent[] oContentsIn)
        throws EnablerFailedException
    {
        String[] oFileNames = new String[oContentsIn.length];
        File[] oFiles = new File[oContentsIn.length];
        FileOutputStream oFout = null;

        try
        {
            for (int i = 0; i < oFiles.length; i++)
            {
                oFiles[i] = new TempFile(TEMP_DIR, oContentsIn[i].getName());
                oFileNames[i] = oFiles[i].getPath();
                oFout = new FileOutputStream(oFiles[i]);
                oFout.write(oContentsIn[i].getRawData());
                oFout.close();
            }
        }
        catch (IOException e)
        {
            throw new EnablerFailedException(e);
        }

        String sPID = printFiles(sPrinterIn, oFileNames);

        for (int i = 0; i < oFiles.length; i++)
        {
            //oFiles[i].delete();
        }

        return sPID;
    }

    /**
     * Prints files using a RightFAX fax server.
     * @param sPrinterIn is the printer alias recognized by the RightFAX fax
     */
}
```

```
server.  
@param oFilesIn is the list of files to send to the printer.  
@throws EnablerFailedException if the print was unsuccessful.  
*/  
public final String printFiles(String sPrinterIn, String oFilesIn[])  
throws EnablerFailedException  
{  
    if (Debug.PRINT)  
    {  
        StringBuffer oDebug = new StringBuffer("sending print to '")  
            .append(sPrinterIn)  
            .append("'>")  
            .append(";files:");  
  
        for (int i1 = 0; i1 < oFilesIn.length; i1++)  
        {  
            oDebug.append(oFilesIn[i1]).append(" ");  
        }  
  
        System.out.println(oDebug.toString());  
    }  
  
    RFaxSubmit oSubmit = new RFaxSubmit();  
  
    try  
    {  
        oSubmit.setTargetURL(System.getProperty("rightfax.PrintServerURL"));  
  
        oSubmit.m_FaxDocument.addRecipient_printer(sPrinterIn);  
  
        for (int i = 0; i < oFilesIn.length; i++)  
        {  
            oSubmit.addAttachment(oFilesIn[i]);  
        }  
  
        Vector oRetList = null;  
        oRetList = oSubmit.submit();  
  
        if (Debug.PRINT && (oRetList != null))  
        {  
            int niNumSubmitted = oRetList.size();  
  
            for (int i = 0; i < niNumSubmitted; i++)  
            {
```

```
        RFStatus rFStatus = (RFStatus)oRetList.elementAt(i);
        System.out.println(
            new StringBuffer("ID: ").append(rFStatus.getID())
                .toString());
        System.out.println(
            new StringBuffer("Code: ")
                .append(rFStatus.getStatusCode()).toString());
        System.out.println(
            new StringBuffer("Msg: ")
                .append(rFStatus.getStatusMsg()).toString());
    }
}
}
catch (Exception e)
{
    throw new EnablerFailedException(e);
}

return new StringBuffer()
    .append("print_")
    .append(System.currentTimeMillis())
    .append("_")
    .append(System.getProperty("user.timezone","?"))
    .toString();
}
}
```

### 6.1.3.2 Implementing the Glue Code

Using the glue code for sending print jobs via RightFAX requires adding a couple of configuration flags to the Fulfillment Server start script and making sure that RightFAX Java API's and glue code are on the CLASSPATH. The archive file that includes the RightFAX API's, called RFJavaInt.zip, should be included with your RightFAX software. The flags to be included in the Fulfillment Server start script are:

- `engine.PrintEnabler` indicates the class that the FulfillmentServer should use as its Print Enabler.
- `rightfax.PrintServerURL` indicates the intranet location of the RightFAX Print Server.
- `print.TempDir` (default is 'tmp') indicates the directory where temporary files are to be stored for creating deliverable print content.

Each flag should appear in the start script with the form '-Dname=value'. An example of this would be '-Dprint.TempDir=c:\temp'. For more information on this, please go to the <http://java.sun.com> website and look for information on Java Properties.

#### **6.1.4 Troubleshooting the RightFax Integration**

Q:What if a fax request is sent and the Fulfillment Server is not set up to send faxes?

A:If the Fulfillment Server receives a fax request and is not configured to send faxes, an error will be logged in the Servers error log and Fulfillment History tables will note the failure to send the fax.

Q:What if a print request is sent and the Fulfillment Server is not set up to send print jobs?

A:If the Fulfillment Server receives a print request and is not configured to send print jobs, an error will be logged in the Servers error log and Fulfillment History tables will note the failure to print.



---

# Fulfillment Server Startup Script Parameters

This appendix describes the fulfillment server parameters that can be set in the fulfillment server startup script. Parameters are listed after the java or jre command and before the name of the class being executed. In addition, you must prefix the parameter with '-D'. For example,

```
-Dengine.AOLJ.config=<full_path_to_dbc_file> \
```

See [Section 4.3.1, "Creating a Startup Script for the Fulfillment Server"](#) for more information about startup scripts.

Topics include:

- [Section A.1, "Required Flags"](#)
- [Section A.2, "Optional Flags"](#)
- [Section A.3, "Debug Flags"](#)
- [Section A.4, "Additional Java Flags"](#)

## A.1 Required Flags

The following flags are required. The fulfillment server will not start if these flags are not in the startup script. See [Section 4.3.1, "Creating a Startup Script for the Fulfillment Server"](#) for more information.

### A.1.1 engine.ServerID

The engine.ServerID flag is used to identify the configuration that is used when the server is started by the script. A server identifier is assigned when

the server configuration (also referred to as a server) is created in the Oracle One-to-One Fulfillment administrative console. Servers and their identifiers are listed on the Server tab. See [Section 5.2.1, "Creating a Fulfillment Server"](#) for more information.

### A.1.2 engine.AOLJ.config

The engine.AOLJ.config flag is used to identify the full path to the database connectivity file. See [Section 3.1.1.3, "Database Connectivity File"](#) for information about database connectivity files.

## A.2 Optional Flags

The following flags are optional. Certain flags, such as the logging flags, can degrade the performance of the server. Other flags can improve the performance of the server.

### A.2.1 email.PrefersMultipartAlternative

The email.PrefersMultipartAlternative flag is used to specify that the server is to allow a text-only alternative for the DATA or QUERY content that is sent via e-mail.

### A.2.2 email.TextOnly

The email.TextOnly flag is used to specify that the server is to send out text-only e-mails instead of the HTML-based e-mails that it sends out for its DATA or QUERY contents.

### A.2.3 engine.CommandPort

The engine.CommandPost flag is used to identify the port number, on the machine that is hosting the fulfillment server, that the fulfillment server will monitor for remote commands. The port number must also be specified in the remote command script. Also see [engine.CommandPromptEnabled](#).

### A.2.4 engine.CommandPromptEnabled

The engine.CommandPromptEnabled flag is used to enable the fulfillment server to receive commands at the command prompt from which it was started. This parameter is inactive if the fulfillment server is running in the

background on UNIX or as a service on Windows NT. Also see [engine.CommandPort](#).

Default: true

### A.2.5 engine.DefProcesses

The `engine.DefProcesses` flag indicates the number of sub-processes the fulfillment server will run at startup. Each sub-process is responsible for dequeuing and processing individual requests whether single or batch. When the server is not busy processing requests, this number eventually reduces to the minimum ([engine.MinProcesses](#)). When the server is busy processing requests, this number eventually increases to the maximum ([engine.MaxProcesses](#)).

### A.2.6 engine.ErrorLog

The `engine.ErrorLog` flag specifies the name of the server error log. This value overrides the `JTF_FM_ERROR_LOG` profile option. Also see [engine.LogPath](#) and [engine.LogLevel](#).

Default: Errors.log

### A.2.7 engine.EventLog

The `engine.EventLog` flag specifies the name of the server event log. This value overrides the `JTF_FM_EVENTS_LOG` profile option. Also see [engine.LogPath](#).

Default: Events.log

### A.2.8 engine.FaxEnabler

The `engine.FaxEnabler` flag indicates the class that the fulfillment server is to use for sending faxes. This class must implement the `'oracle.apps.jtf.fm.engine.disp.FaxEnabler'` interface to be used as a fax enabler. Also see [engine.FaxEnabler](#).

### A.2.9 engine.LogDispatches

The `engine.LogDispatches` flag is a boolean flag indicating that an XML-based request containing details of a dispatch is to be written to disk. The requests will be saved as an XML file in the form of #####.xml for a

single request or #####\_n.xml for a batch request where '#####' is the request id and 'n' is the batch number. The file will be saved in a directory called dispatches under the log path. Also see [engine.LogPath](#) and [engine.LogRequests](#).

## A.2.10 engine.LogLevel

The engine.LogLevel flag indicates the level of detail that will be written to the error log (see [engine.ErrorLog](#)). For each number from 1-n the server will write an extra layer of chained exception traces to the errors log. The exceptions are chained together so that the source of the errors as they occur can be traced.

## A.2.11 engine.LogPath

The engine.LogPath flag specifies the directory path where fulfillment server logging occurs.

Default: [engine.ServerPath](#). If the server path is not set, then the default is the logs directory under the directory from which the server is started.

## A.2.12 engine.LogRequests

The engine.LogRequests flag is a boolean flag indicating that the original XML-based request pulled from an Advanced Queue by the server is to be written to disk. The requests will be saved as an XML file in the form of #####.xml where '#####' is the request id. The requests will be saved in a directory called requests under the log path. Also see [engine.LogPath](#) and [engine.LogDispatches](#).

## A.2.13 engine.MaxProcesses

The engine.MaxProcesses flag specifies the maximum number of sub-processes the fulfillment server can run. Each sub-process is responsible for dequeuing and processing individual requests whether single or batch. When the server is not busy processing requests, this number eventually reduces to the minimum. When the server is busy processing requests, this number eventually increases to the maximum. Also see [engine.MinProcesses](#) and [engine.DefProcesses](#).

### A.2.14 `engine.MaxProcessIdle` (obsolete)

The `engine.MaxProcessIdle` is an obsolete flag that indicated the maximum amount of time a sub-process of the fulfillment server could remain idle before it is to be recycled into the server resources. Also see [engine.ProcessIdle](#).

### A.2.15 `engine.MinProcesses`

The `engine.MinProcesses` flag specifies the minimum number of sub-processes the fulfillment server can run. Each sub-processes is responsible for dequeuing and processing individual requests whether single or batch. When the server is not busy processing requests, this number eventually reduces to the minimum. When the server is busy processing requests, this number eventually increases to the maximum. Also see [engine.MaxProcesses](#) and [engine.DefProcesses](#).

### A.2.16 `engine.PrintEnabler`

The `engine.PrintEnabler` flag indicates the class that the fulfillment server is to use for sending print jobs to the printer. This class must implement the `oracle.apps.jtf.fm.engine.disp.PrintEnabler` interface to be used as a print enabler. Also see [engine.FaxEnabler](#).

### A.2.17 `engine.ProcessIdle`

The `engine.ProcessIdle` flag indicates the amount of time, in milliseconds, that a sub-process of the fulfillment server can remain idle before it is recycled into the server resources.

### A.2.18 `engine.RefreshRate`

The `engine.RefreshRate` flag indicates the amount of time, in milliseconds, between server refreshes. This is when the server checks the status of all sub-processes to make sure they are functioning correctly.

### A.2.19 `engine.RequestStoreMax`

The `engine.RequestStoreMax` flag indicates the maximum number of request that the server will dequeue from the incoming request queue before allowing them to be processed. Once the number of internally queued request drops below the maximum, the server starts to dequeue

again. The default value for this is the higher value of 10 or what the maximum number of processes is set to. Also see [engine.MaxProcesses](#).

### **A.2.20 engine.ResultSetWarningLimit**

The `engine.ResultSetWarningLimit` flag indicates how large of a ResultSet can be returned from a database query, before a warning will be logged to the fulfillment servers error log. This is to warn the server administrator that in case of an `OutOfMemoryError`, it might have been caused by the size of the Result Set.

### **A.2.21 engine.ServerPath**

The `engine.ServerPath` flag specifies the base directory under which all temporary, log files, etc. are written to. This flag can be set instead of setting [engine.LogPath](#) and [engine.TempDir](#).

### **A.2.22 engine.TempDir**

The `engine.TempDir` flag specifies the directory under which the fulfillment server writes files that need to temporarily be written to disk.

### **A.2.23 db.ExitOnFailure**

The `db.ExitOnFailure` flag specifies that the fulfillment server is to shutdown when the database becomes unavailable.

### **A.2.24 history.NoContents**

The `history.NoContents` flag indicates the fulfillment server is not to write Content Level History. This is detailed information about the processing and delivery of Fulfillment Content. This flag should be used when content history is not needed but a performance boost is. Also see [history.NoInteractions](#).

### **A.2.25 history.NoInteractions**

The `history.NoInteractions` flag indicates the fulfillment server is not to write Interaction History. This is detailed information about the interaction between the agent and parties addressed in the Fulfillment request. This

flag should be used when Interaction History is not needed but a performance boost is. Also see [history.NoContents](#).

### A.2.26 `pkg.ident`

The `pkg.ident` flag specifies the fulfillment server should write class file versions of the fulfillment server to the events log. This only works when the `oracle.apps.jtf.fm.FulfillmentServer` class is used to start the fulfillment server instead of `oracle.apps.jtf.fm.engine.Processor`.

### A.2.27 `pkg.showmissing`

The `pkg.showmissing` flag works with the [pkg.ident](#) flag and specifies the fulfillment server note missing class files in the events log. This is useful when wrapping an older version of the fulfillment server with the `FulfillmentServer` class. This only works when the `oracle.apps.jtf.fm.FulfillmentServer` class is used to start the fulfillment server instead of `oracle.apps.jtf.fm.engine.Processor`.

### A.2.28 `log.ShowWarnings`

The `log.ShowWarnings` flag indicates that warnings are to be logged to the error log. By default, warnings do not show up in the error log. If this flag is not set, then the first time a warning appears, a, one time only, message shows up in the events log signifying that a warning had been issued.

### A.2.29 `request.MultiThreadBatch`

The `request.MultiThreadBatch` is a boolean flag that indicates that processing of batch requests is to be multi-threaded. Multi-threaded batches take less time to process than single-threaded batches. By default this value is set to true.

### A.2.30 `request.NumBatchThreads`

The `request.NumBatchThreads` flag is used to indicate the number of batch threads to use for multi-threaded batches. The default value for this is 3 and probably should not be overridden unless running on a multi-processor machine with Native Java Threads. For more information on why this is important, you should read about Native Java Threads vs. Green Java Threads.

### A.2.31 smtp.port

The smtp.port flag is used to override the default port 25 for e-mails sent to an SMTP e-mail server.

### A.2.32 smtp.server

The smtp.server flag is used to override the default SMTP server that is set using the Oracle One-to-One Fulfillment administrative console.

## A.3 Debug Flags

The fulfillment server debug flags are used to track the process flow in such a way that is useful for debugging. These cannot and should not be used to improve the performance of the server. By using any of these flags you are hindering the performance of the server by the amount of time it takes for the debug sections to be executed. Debug information, in most cases, is either written to the Events log or it is written to the command prompt.

### A.3.1 debug

The debug flag is the newest of the 'debug' flags and should be used instead of any of the others. While the other debug flags are boolean, this one allows you to set a string of debug options separated by commas. An example of this would be:

```
-Ddebug=request,email,fax
```

All debugs can be turned on with the debug value full and conversely all debugs can be overridden to be turned off with the debug value off.

The replace values for each of the older flags is listed under the definition of that flag.

### A.3.2 engine.FaxDebug

The engine.FaxDebug is used to debug the sending of faxes through the fulfillment server. Details will be written to the Events log and sometimes to the command prompt. The new debug value for this is fax (see [debug](#)).

### A.3.3 engine.HistoryDebug

The engine.HistoryDebug is used to debug the writing of Fulfillment, Content, and Interaction History through the fulfillment server. Details will be written to the Events log. The new debug value for this is history (see [debug](#)).

### A.3.4 engine.LogDebug

The engine.LogDebug is used to debug the writing of log files by the fulfillment server. Details will be written to the command prompt since log files may not be available. The new debug value for this is log (see [debug](#)).

### A.3.5 engine.MailDebug

The engine.MailDebug is used to debug the sending of e-mail through the fulfillment server. Details will be written to the Events log and sometimes to the command prompt. The new debug value for this is e-mail (see [debug](#)).

### A.3.6 engine.MonitorDebug

The engine.MonitorDebug is used to debug the fulfillment server Monitor processes. These are the processes that handle the behind the scenes work in the fulfillment server such as dequeing of requests and receiving remote commands. Details will be written to the Events log and sometimes to the command prompt. The new debug value for this is monitor (see [debug](#)). Also see [engine.ProcessorDebug](#).

### A.3.7 engine.PrintDebug

The engine.PrintDebug is used to debug the sending of print jobs through the fulfillment server. Details will be written to the Events log and sometimes to the command prompt. The new debug value for this is print (see [debug](#)).

### A.3.8 engine.ProcessorDebug

The engine.ProcessorDebug is used to debug the inner workings of the fulfillment server (the core of the server). This reveals many of the details of the behind the scenes processing that takes place outside of the monitors. Details will be written to the events log and sometimes to the command

prompt. The new debug value for this is processor (see [debug](#)). Also see [engine.MonitorDebug](#).

### A.3.9 engine.QueryDebug

The engine.QueryDebug is used to debug the queries that are executed by the fulfillment server. Details of the queries will be written to the Events log. The new debug value for this is query (see [debug](#)).

### A.3.10 engine.RequestDebug

The engine.RequestDebug is used to debug the behind the scenes processing of fulfillment requests. Details of the requests will be written to the events log. The new debug value for this is request (see [debug](#)).

### A.3.11 engine.SoftwarePathDebug

The engine.SoftwarePathDebug is used to debug the software execution path within the code for each request. This is mainly for batch requests. Details will be written to the Events log. The new debug value for this is path (see [debug](#)).

### A.3.12 engine.StatDebug

The engine.StatDebug is used to debug the execution times of individual requests received by the fulfillment server. Details will be written to the Events log and the command prompt. The new debug value for this is stat (see [debug](#)).

### A.3.13 engine.XheadDebug

The engine.XheadDebug is used to insert detailed information about the Fulfillment Request into the header of outbound e-mails. This is useful for matching requests submitted with e-mails received. The new debug value for this is header (see [debug](#)).

### A.3.14 request.ContentDebug

The engine.ContentDebug is used to debug the contents downloaded from the database by the fulfillment server. This is especially useful when the fulfillment server delivers erroneous content and you want to see if it was

caused by server processing or existed at the time of download. The contents will be written in a contents directory under the log path in a directory matching the content id. The new debug value for this is content (see [debug](#)).

## A.4 Additional Java Flags

These are the standard flags of the Java programming language that will be useful to know in order to get the most out of your fulfillment server. Some of these flags may not exist depending on the version of Java used to run the fulfillment server. You can view a list of Java flags that will work with your version of Java simply by typing the full path to the java or jre command, as you would use to start the fulfillment server.

### A.4.1 ms

The ms flag is used to specify the amount of memory to allocate to the fulfillment server on startup. It is to be used as `-Dms## [k|m]` where ## is the amount of memory and k is kilobytes and m is megabytes. Specifying a larger value for ms at startup can give some performance gains depending on how memory intensive the server is for the types of requests it is processing. The default value is 1 MB.

### A.4.2 mx

The mx flag is used to specify the maximum amount of memory to allocate to the fulfillment server. The server will start out with the value for 'ms' and work it's way up to the value of mx as it is needed. It is to be used as `-Dmx## [k|m]` where ## is the amount of memory and k is kilobytes and m is megabytes. This flag should be used if the server is encountering an `OutOfMemoryError`. The default value is 16 MB.



# B

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## Fulfillment Server Commands

This appendix describes the commands used to operate a fulfillment server once it is running. If the `engine.CommandPromptEnabled` parameter is set to true, then you can enter the command at the same command prompt from which the fulfillment server was started.

Commands include:

- `flush logs`
- `help`
- `kill`
- `list error <n>`
- `list events <n>`
- `mstat`
- `pstat`
- `restart`
- `start`
- `stat`
- `stop`
- `tstat`

### B.1 flush logs

Use this command to force the log buffers to write to disk.

## **B.2 help**

Use this command to display all of the valid commands for the fulfillment server.

## **B.3 kill**

Use this command to stop the server. To restart the server, run the server startup script.

## **B.4 list error <n>**

Use this command to list a specific entry in the error log. The parameter *n* can be a single number, a range of numbers, or the word count to list the number of entries in the log.

## **B.5 list events <n>**

Use this command to list a specific entry in the event log. The parameter *n* can be a single number, a range, or the word count to list the number of entries in the log.

## **B.6 mstat**

Use this command to print statistics about the fulfillment server monitors.

## **B.7 pstat**

Use this command to print statistics about the fulfillment server processes.

## **B.8 restart**

Use this command to stop and automatically restart the fulfillment server.

## **B.9 start**

Use this command to start a stopped fulfillment server.

## **B.10 stat**

Use this command to print statistics about the fulfillment server.

## **B.11 stop**

Use this command to pause fulfillment server processing. To resume processing, use the start command.

## **B.12 tstat**

Use this command to print statistics about the java thread activity in the fulfillment server.

