

Oracle® Interaction Center Intelligence

Implementation Guide

Release 11*i*

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Oracle Interaction Center Intelligence Implementation Guide, Release 11*i*

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

- Did you find any errors?
- Is the information clearly presented?
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If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Postal service:
Oracle Corporation
Oracle Interaction Center Intelligence Documentation
1900 Oracle Way
Reston, VA 20190
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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

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

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

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

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

- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

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

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

[Chapter 2, "Before You Begin"](#), describes the technology stack for Oracle Interaction Center Intelligence and the Oracle Interaction Center Intelligence architecture. This chapter also describes applications that are required for Oracle Interaction Center Intelligence to function or that provide additional functionality.

[Chapter 3, "Implementation Tasks"](#), provides task-based procedures for implementing Oracle Interaction Center Intelligence.

[Chapter 4, "Diagnostics and Troubleshooting"](#), describes how to troubleshoot the implementation of Oracle Interaction Center Intelligence.

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

Documentation Accessibility

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

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

Other Information Sources

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

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

Online Documentation

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

Related Documentation

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to This Product

Oracle Universal Work Queue Concepts and Procedures

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

Oracle Applications Interaction Center Implementation Guide

Use this guide to implement Interaction Center Server Manager.

Oracle Advanced Inbound Implementation Guide

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

Oracle Advanced Outbound Implementation Guide

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

Oracle Scripting Implementation Guide

Use this guide to implement Oracle Scripting.

Oracle eMail Center Implementation Guide

Use this guide to implement Oracle eMail Center.

Oracle Interaction Center Intelligence Implementation Guide

Use this guide to implement Oracle Interaction Center Intelligence.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle eTechnical Reference Manuals

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

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

Support

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

OracleMetaLink

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

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

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

Introduction

This chapter provides information on the following topics:

- [Section 1.1, Oracle Interaction Center Overview](#)
- [Section 1.2, Oracle Interaction Center Intelligence Overview](#)
- [Section 1.3, New in this Release](#)
- [Section 1.4, Architecture and Technology](#)
- [Section 1.5, Security](#)
- [Section 1.6, Responsibilities](#)

1.1 Oracle Interaction Center Overview

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

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

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

The Oracle Interaction Center products include:

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

See Also

- [Section 1.3, New in this Release](#)

1.1.1 Oracle Advanced Inbound

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

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

See Also

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

1.1.2 Oracle Advanced Outbound

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

- A tactical list manager, which determines who to call and when to call them

- An outbound dialing engine, which dials numbers and transfers live contacts to call center agents

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

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

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

See Also

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

1.1.3 Oracle eMail Center

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

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

See Also

- [Oracle Advanced Inbound](#)
- [Oracle Advanced Outbound](#)
- [Oracle Scripting](#)

- [Oracle Universal Work Queue](#)
- [Oracle Interaction Center Intelligence](#)

1.1.4 Oracle Scripting

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

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

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

See Also

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

1.1.5 Oracle Universal Work Queue

Oracle Universal Work Queue is an agent portal that presents and delivers work items generated through customer contact channels or CRM business applications. Agents can select work directly from the Oracle Universal Work Queue desktop user interface.

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

See Also

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

1.2 Oracle Interaction Center Intelligence Overview

The competitive environment in which we all thrive, challenges interaction centers to provide ever greater customer satisfaction, more consistent customer interactions, increase efficiencies and reduce costs towards increasing revenues and bottom line profits. Interaction Center Intelligence is a web-based operational performance-management application for interaction center supervisors, managers and agents.

As the customer touchpoints become more sophisticated, the need to understand and manage these complex touchpoints become imperative. Supervisors and managers need to quickly and accurately gather interaction and business application data (queue depth, length and peaks; agent productivity - converted opportunities, closed service requests, agent utilization, service levels) to make tactical and strategic decisions. Agents can monitor and motivate themselves with access to their own efficiency and effectiveness results.

Interaction activity is monitored down to half hour time segments and is available for:

- Advanced Inbound
- Advanced Outbound
- eMail Center
- Universal Work Queue

Interaction Center Intelligence provides real time monitoring of advanced inbound agents and queues. Agent group snapshots with drill-downs to agents expose activity status, competencies and daily time reporting.

Queue snapshots monitor calls waiting, longest call waiting and daily cumulative metrics with drill-downs to agents working on a particular call classification.

Self service reporting is supported through an agent group based security model. An enhanced user experience with little or no training is derived through an intuitive HTML interface with bins, drill-downs and a variety of 3-D graphics. Application dependencies for business data from Oracle TeleService and TeleSales are managed via simple setup. Interaction Center Intelligence is the only reporting solution to bridge CTI (computer telephony integration), transactional business applications and agent information, minimizing implementation times and total cost of ownership.

See Also

- [Section 1.1, Oracle Interaction Center Overview](#)
- [Section 1.3, New in this Release](#)

1.2.1 Oracle Interaction Center Intelligence Features

Oracle Interaction Center Intelligence:

- Monitoring of interaction activity down to half hour time segments for the following Oracle Applications:
 - Advanced Inbound
 - Advanced Outbound
 - eMail Center
 - Universal Work Queue
- Real time monitoring of advanced inbound agents and queues.
- Agent group snapshots with agent drill-down for viewing activity status, competency, and daily time reporting.
- Queue snapshots which provide a view of calls waiting, longest call waiting and daily cumulative metrics with drill-downs to agents working on a particular call classification.
- Self service reporting is supported through an agent group based security model.
- Intuitive HTML interface with bins, drill-downs and a variety of 3-D graphics.
- Bridges CTI (computer telephony integration), transactional business applications and agent information.
- There are 7 bins in which a user can subscribe (2 real time and 5 historical).

- There are 22 reports with information down to half-hour segments (4 real time reports and 18 historical reports).

1.2.1.1 Home Page

Every user has the option of customizing their home pages by clicking on the Personalize link on the top right corner of the page. This will allow them to choose which bins, reports or graphs they want to see on their page. The administrator decides which components can be accessed by which users/responsibilities.

1.2.1.2 Bins

Bins provide crucial performance statistics for calls, agents and queues are presented up front in the form of bins. These provide you with condensed up-to-date information even before running a single report.

Bins offer you a condensed snapshot of the key metrics in your interaction center to give you a quick indication of the performance of your center. These bins also provide drill-downs to the more detailed reports for further investigation.

The bins are:

- Agent Email
- Agent Status
- Calls Handled
- Classification
- Email Accounts
- Queue Status
- UWQ Activity

1.2.1.3 Real-Time Reports

The real-time reports can provide up-to-the-minute information on key performance metrics. Real-time reports help you uncover problems as soon as they occur to help you take immediate action. These reports serve as very useful tools to plan the day's activities.

They are:

- Agent Status Report
- Agent Detail Report

- Queue Status Report
- Queue Detail Report

1.2.1.4 Historical Reports

Historical reports can report on customer interactions for half-hour time segments. Data can be collected daily or at any other pre-determined interval. These reports have very detailed information of various important measures, grouped, filtered and sorted by numerous parameters. In conjunction with bins, these reports provide actionable business intelligence to the interaction center manager.

They are:

- Agent by Classification Report
- Agent Group Report
- Agent Productivity by Campaign Report
- Campaign Dialing by Agent Report
- Campaign Outcomes by Agent Report
- Campaign Outcomes Report
- Campaign Performance by Agent Report
- Campaign Performance Report
- Classification Report
- DNIS Report
- Email Account Report
- Email Account Agent Report
- Email Agent Group Report
- Key Performance Comparison by Period Report
- Session Logins Report
- Session Duration Report
- Transactional KPIs - Agent Report
- Transactional KPIs - Classification Report

1.3 New in this Release

- Two new bins and three reports that support eMail Center integration.
 - Agent Email Bin
 - Email Accounts Bin
 - Email Account Agent Report
 - Email Account Report
 - Email Agent Group Report
- Six new reports that support Advanced Outbound integration.
 - Agent Productivity by Campaign Report
 - Campaign Dialing by Agent Report
 - Campaign Performance by Agent Report
 - Campaign Performance Report
 - Campaign Outcomes by Agent Report
 - Campaign Outcomes Report
- Ability to export data to Excel
- Diagnostics tool

See Also

- [Section 1.3.1, Agent Email Bin](#)
- [Section 1.3.2, Email Accounts Bin](#)
- [Section 1.3.3, Agent Productivity by Campaign Report](#)
- [Section 1.3.4, Campaign Dialing by Agent Report](#)
- [Section 1.3.5, Campaign Performance by Agent Report](#)
- [Section 1.3.6, Campaign Performance Report](#)
- [Section 1.3.7, Campaign Outcomes by Agent Report](#)
- [Section 1.3.8, Campaign Outcomes Report](#)
- [Section 1.3.9, Email Account Agent Report](#)
- [Section 1.3.10, Email Account Report](#)

- [Section 1.3.11, Email Agent Group Report](#)
- [Section 1.3.12, Exporting Data to Excel](#)

1.3.1 Agent Email Bin

The Agent Email bin is a historical bin that displays the following information by agent group:

- Number of e-mails fetched
- Number of fetched e-mails that have not been processed
- The age of the oldest e-mail that has been fetched but not processed

You can access an Email Agent Group report by clicking the agent group hyperlink.

1.3.2 Email Accounts Bin

The Email Accounts bin is a historical bin that displays the following information by email account:

- The number of e-mails
- The age of the oldest e-mail
- The number of fetched e-mails that have not been processed

You can access an Email Account report by clicking the account hyperlink.

1.3.3 Agent Productivity by Campaign Report

The Agent Productivity by Campaign report displays information about an agent's productivity by campaign. You can filter the report by agent, campaign, campaign schedule, agent group, and timeperiod.

1.3.4 Campaign Dialing by Agent Report

The Campaign Dialing by Agent report displays information about dialing statistics for a campaign by agent. You can filter the report by agent, campaign, campaign schedule, agent group, and timeperiod.

1.3.5 Campaign Performance by Agent Report

The Campaign Performance by Agent report displays information about outbound call and transaction activity for an agent. You can filter the report by interaction center site, campaign schedule, agent group, and timeperiod.

1.3.6 Campaign Performance Report

The Campaign Performance report displays information about outbound call details, connects, contacts, and positive responses by campaign. You can filter the report by interaction center site, campaign schedule, agent group, and timeperiod.

1.3.7 Campaign Outcomes by Agent Report

The Campaign Outcomes by Agent report displays information about outcomes, results, and reasons for campaigns by agent. You can filter the report by agent, campaign, campaign schedule, target group, and timeperiod.

1.3.8 Campaign Outcomes Report

The Campaign Outcomes report displays information about outcomes, results, and reasons for campaigns. You can filter the report by agent, campaign, campaign schedule, target group, and timeperiod.

1.3.9 Email Account Agent Report

The Email Account report displays information about email activity for an agent group. You can filter the report by email account, email classification, and timeperiod.

1.3.10 Email Account Report

The Email Account report displays information about email activity for an email account. You can filter the report by email account, email classification, and timeperiod.

1.3.11 Email Agent Group Report

The Email Agent Group report displays information about email activity for an email account. You can filter the report by agent group, email account, and timeperiod.

1.3.12 Exporting Data to Excel

The ability to export report data to Excel has been added as a feature to Oracle Interaction Center Intelligence. Report data is downloaded as a text file in a .csv file format.

1.4 Architecture and Technology

Interaction Center Intelligence is a web based product, which gives a easy-to-use intelligence reporting mechanism for business users and is based on a three-tier architecture.

- The front end or the client who is using the system through a simple web browser (no other software is required on the user's machine).
- The middle tier, which contains the web server (Apache server) and application server (Forms), which come as part of the Oracle Applications installation.
- The database tier, which is an Oracle 8i database.

Interaction Center Intelligence is built using the Declarative Components Framework which is provided as a part of the Oracle CRM Foundation (JTF) module. Declarative Components are personalizable software objects that are dynamically generated from a metadata repository. ICI contains the following types of objects:

- Bins
- Report
- Graph Report

Each component derives its data content format from three distinct layers:

- Data: the actual data content which resides in the target database tables
- Metadata: stored in Oracle's AK tables
- Renderer: a rendering mechanism provided by JTF

There are two kinds of information: real time and historical. For real time information, the programs read directly from the OLTP (transactional) base tables to generate the data content. The historical reports on the other hand read from a set of intermediate summary tables which are designed are optimum query performance. Population programs run periodically to populate the intermediate tables and the reports are run off these tables.

1.5 Security

Security is controlled by the standard Oracle Applications security framework. Every user of the system must be granted some responsibilities. When the user logs in to ICI, the components that are available would depend on the responsibility that the user is associated with. Responsibilities are assigned by the System Administrator using Oracle Applications. Once the user is granted certain responsibilities, the user has the flexibility within the ICI application, to change to a different responsibility.

Each component (bin/report/graph) can be assigned to a responsibility. The pre-seeded ICI responsibilities (Interaction Center Intelligence User HTML and Interaction Center Intelligence Administrator HTML) have access to all the ICI components, by default. If a user logs on with a responsibility which does not have the appropriate access rights, the user will be unable to run a bin or report to which the administrator has not specifically granted access. This process of configuring component security is done by logging in to the Oracle Applications JTF page as an Administrator. Since this is a JTF feature, please refer to the Oracle CRM Foundation guide for more details on this feature.

1.6 Responsibilities

ICI comes pre-seeded with the following responsibilities:

- Interaction Center Intelligence User HTML
This responsibility allows the user to run and view bins, reports, and graphs.
- Interaction Center Intelligence Administrator HTML
This responsibility allows the user to run and view the components, and set up application wide profiles (e.g., goals, application dependencies).
- Interaction Center Intelligence User Apps
This responsibility allows users to set up their profile values.
- Interaction Center Intelligence Administrator Apps
This responsibility allows the user to run concurrent programs and set up profiles which are needed for ICI.

The administrator may choose to seed other custom responsibilities as well depending on the requirements of the organization. ICI supports security at a component level. If a component is accessible only by a certain responsibility, users who do not have this responsibility will be unable to view this component. This

allows administrators to control component security at a very granular level. Depending on the needs of the organization, the administrator might decide that new responsibilities are needed, in addition to the four pre-seeded responsibilities. If needed, these new responsibilities can be created through Oracle Applications as a System Administrator.

Before You Begin

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing the Oracle Interaction Center Intelligence.

Topics include:

- [Section 2.1, "Related Documentation"](#)
- [Section 2.2, "Dependencies"](#)

2.1 Related Documentation

This section lists documentation and other information related to the implementation of Oracle Interaction Center Intelligence (ICI). ICI shares business and setup information with other Oracle Applications products.

Documentation

You will need the following guides to implement Oracle Interaction Center Intelligence.

Oracle Interaction Center Implementation Guide

Use this guide to implement Interaction Center Server Manager.

Oracle Universal Work Queue Concepts and Procedures

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

Oracle Advanced Inbound Implementation Guide

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

Oracle Advanced Outbound Implementation Guide

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

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.

2.2 Dependencies

Oracle Interaction Center Intelligence depends on other Oracle Applications products and components. When Interaction Center Intelligence is first installed, it will be set up with empty summary tables and materialized views. These need to be refreshed from the base transaction tables which reside in the corresponding OLTP schemas. For ICI to be fully functional the system administrator needs to ensure that the dependencies are met and that the base OLTP tables contain data.

2.2.1 ICI Tables

The following table lists the tables that are created in the BIX schema for use by ICI programs:

Table	Description
BIX_DM_UWQ_AGENT_SUM	This table stores Universal Work Queue information summarized by day by agent. The format of this table closely reflects the format that is used in the reports. This facilitates better query performance as the bins/reports perform a direct select from the summary table at run-time, without having to hit the transactional tables. The table stores total durations. Average durations are calculated at run-time while rendering the bin/report.
BIX_DM_UWQ_GROUP_SUM	This table stores Universal Work Queue information summarized by day by group. The format of this table closely reflects the format that is used in the reports. This facilitates better query performance as the bins/reports perform a direct select from the summary table at run-time, without having to hit the transactional tables. The table stores total durations. Average durations are calculated at run-time while rendering the bin/report.
BIX_DM_AGENT_SUM	This table stores Call related information, summarized by agent, per half hour.
BIX_DM_GROUP_SUM	This table stores Call related information, summarized by agent, per half hour.
BX_DM_CALL_SUM	This table stores Call related information summarized per half hour.
BIX_DM_AGENT_OUTCOME_SUM	This table stores information relating to the outcomes of outbound calls, summarized by agent, per half hour.
BIX_DM_GROUP_OUTCOME_SUM	This table stores information relating to the outcomes of outbound calls, summarized by agent group, per half hour.
BIX_DM_AGENT_SESSBYCAMP_SUM	This table stores information relating to the agents login time and work time, summarized by campaign schedule, per agent, per half hour.
BIX_DM_AGENT_SESSBYCAMP_SUM	This table stores information relating to the agents login time and work time, summarized by campaign schedule, per agent, per half hour.

Table	Description
BIX_DM_GROUP_SESSBYCAMP_SUM	This table stores information relating to the agent group's login time and work time, summarized by campaign schedule, per agent group, per half hour.
BIX_DM_EMAIL_AGENT_SUM	This table contains eMail Center agent related measures summarized by the emails account (Account to which emails came in), Classification of Email (E.g.: GOLD, SILVER), Resource and Time.
BIX_DM_EMAIL_GROUP_SUM	This table contains eMail Center agent related measures summarized by the Email account (Account to which emails came in), Classification of Email (E.g.: GOLD, SILVER), Resource Group and Time.
BIX_DM_EMAIL_SUM	This table contains eMail Center measures summarized the emails account (Account to which emails came in), Classification of Email (E.g.: GOLD, SILVER) and Time.
BIX_DM_CONNECT_LOOKUPS	This is a lookup table which maps outcomes to connects. As an example, an outcome of "Answering Machine" could be considered as a "Connect" and an outcome of "Busy" could be considered as a "Non-connect". This mapping is done at the customer site using the setup screen provided for this purpose in ICI. This is one of the required post-install steps for ICI.
BIX_DM_RESPONSE_LOOKUPS	This is a lookup table which maps results to responses. The mapping is done at the customer site using the setup screen provided for this purpose in ICI. This is one of the required post-install steps for ICI.
BIX_DM_INTERFACE	This is table is used by the summary programs as an intermediate table which stores calculated values of some measures. The other summary tables are populated using this interface table.
BIX_DM_COLLECT_LOG	This table records information relating to the execution of the concurrent programs which populate the four summary tables mentioned above. Administrators can check this table after every run of the concurrent program.

Table	Description
BIX_DM_GOALS	This table stores organization related performance goals for Telephony for each classification. These goals/measures are used by some of the reports to perform intelligent analysis on performance of call center, agents etc. This table contains one pre seeded row with a classification_id of -999 for "ALL" classifications. If the goal is not defined for any classification, the "ALL" classification goal is applied for calculating summary columns related to goal
BIX_DM_GOALS_EMG	This table contains goals defined for Email Center for each classification. This table contains one pre seeded row with a classification_id of -999 for "ALL" classifications. If the goal is not defined for any classification, the "ALL" classification goal is applied for calculating summary columns related to goals.
BIX_DM_APPS_DEPENDENCY	This table is populated from the Application Setup Screen, when the user clicks on "Setup Application Dependencies". The data in this table will be used by the summary table population programs to selectively populate certain columns based on whether or not the corresponding OLTP module exists or not.
BIX_DM_EXCEL	This table is used by the reports while exporting data out to a Excel spreadsheet. The table is used as an intermediate store before moving the data to the Excel file.

The database administrator is responsible for sizing these tables according to the needs of the organization. The administrator is also responsible for deciding on the organization's purging mechanism and timeframe. Right now, ICI does not provide a default purge mechanism, as this can vary from one organization to another. Refer to the Interaction Center Intelligence Technical reference Manual for further details on these tables.

2.2.2 ICI Summary Tables and Views

The following table provides a list of ICI summary tables or materialized views and the base tables for which they depend on data. Please refer to the Oracle

Applications CRM Technical Reference Manual for Release 11.5.8 for detailed information on each of the base tables and their functionality.

Summary Table	Tables/Views Used for Data Extraction
BIX_DM_UWQ_AGENT_SUM	IEU_SH_SESSIONS
BIX_DM_UWQ_GROUP_SUM	BIX_DM_UWQ_AGENT_SUM
JTF_RS_GROUP_MEMBERS	JTF_RS_GROUPS_DENORM
BIX_DM_INTERFACE	JTF_IH_INTERACTIONS
JTF_IH_MEDIA_ITEMS	JTF_IH_MEDIA_ITEM_LC_SEGS
JTF_IH_MEDIA_ITM_LC_SEG_TYS	JTF_RS_RESOURCE_EXTNS
JTF_RS_GROUP_MEMBERS	JTF_RS_GROUP_DENORM
IEU_SH_SESSIONS	IEU_SH_ACTIVITIES
IEC_G_LIST_SUBSETS	AMS_ACT_LISTS
AMS_LIST_HEADERS_ALL	AMS_CAMPAIGN_SCHEDULES_VL
AS_SALES_LEADS	AS_LEADS_ALL
AS_STATUSES_VL	CS_INCIDENTS_ALL_B
CS_INCIDENTS_STATUSES_VL	BIX_DM_GOALS
BIX_DM_AGENT_SUM	BIX_DM_INTERFACE
BIX_DM_GROUP_SUM	BIX_DM_AGENT_SUM
JTF_RS_GROUP_MEMBERS	JTF_RS_GROUPS_DENORM
BIX_DM_CALL_SUM	BIX_DM_INTERFACE
BIX_DM_AGENT_OUTCOME_SUM	BIX_DM_INTERFACE
BIX_DM_CONNECT_LOOKUPS	BIX_DM_RESPONSE_LOOKUPS
BIX_DM_GROUP_OUTCOME_SUM	BIX_DM_AGENT_OUTCOME_SUM

Summary Table	Tables/Views Used for Data Extraction
JTF_RS_GROUP_MEMBERS	JTF_RS_GROUPS_DENORM
BIX_DM_AGENT_SESSION_SUM	IEU_SH_SESSIONS
IEU_SH_ACTIVITIES	BIX_DM_GROUP_SESSION_SUM
BIX_DM_AGENT_SESSION_SUM	JTF_RS_GROUP_MEMBERS
JTF_RS_GROUPS_DENORM	BIX_DM_AGENT_SESSBYCAMP_SUM
IEU_SH_SESSIONS	IEU_SH_ACTIVITIES
IEU_UWQ_MEDIA_TYPES_TL	JTF_RS_RESOURCE_EXTNS
AMS_CAMPAIGN_SCHEDULES_B	BIX_DM_GROUP_SESSBYCAMP_SUM
BIX_DM_AGENT_SESSBYCAMP_SUM	JTF_RS_GROUP_MEMBERS
JTF_RS_GROUPS_DENORM	BIX_DM_EMAIL_AGENT_SUM
JTF_IH_MEDIA_ITEMS	JTF_IH_MEDIA_ITEM_LC_SEGS
JTF_IH_MEDIA_ITM_LC_SEG_TYS	BIX_DM_EMAIL_GROUP_SUM
BIX_DM_EMAIL_AGENT_SUM	JTF_RS_GROUP_MEMBERS
JTF_RS_GROUPS_DENORM	BIX_DM_EMAIL_SUM
JTF_IH_MEDIA_ITEMS	JTF_IH_MEDIA_ITEM_LC_SEGS

2.2.3 ICI Report Components

The following table provides a list of the ICI report components and the base tables for which they depend on data. Note that some of the tables are ICI summary tables and others are OLTP tables.

Bin/Report Name	Tables/Views Used for Generation
Agent Status Bin	IEU_SH_SESSIONS
IEU_SH_ACTIVITIES	JTF_IH_MEDIA_ITEM_LC_SEGS
JTF_IH_MEDIA_ITM_LC_SEG_TYS	JTF_IH_INTERACTIONS
JTF_IH_MEDIA_ITEMS	
	Queue Status Bin
JTF_IH_MEDIA_ITEM_LC_SEGS	JTF_IH_MEDIA_ITM_LC_SEG_TYS
JTF_IH_MEDIA_ITEMS	
	UWQ Activity Bin
BIX_DM_UWQ_AGENT_SUM	BIX_DM_UWQ_GROUP_SUM
Calls Handled Bin	BIX_DM_AGENT_CALL_SUM
BIX_DM_GROUP_CALL_SUM	
	Classification Bin
BIX_DM_AGENT_CALL_SUM	
	Agent Email Bin
BIX_DM_EMAIL_AGENT_SUM	BIX_DM_EMAIL_GROUP_SUM
JTF_RS_GROUP_MEMBERS	JTF_RS_RESOURCE_EXTNS
JTF_RS_GROUPS_VL	JTF_RS_GROUPS_DENORM
Email Accounts Bin	BIX_DM_EMAIL_AGENT_SUM
IEM_EMAIL_ACCOUNTS	
	Agent Detail Report
IEU_SH_SESSIONS	IEU_SH_ACTIVITIES

Bin/Report Name	Tables/Views Used for Generation
JTF_IH_MEDIA_ITEM_LC_SEGS	JTF_IH_MEDIA_ITM_LC_SEG_TYS
JTF_RS_RESOURCE_EXTNS_VL	JTF_IH_INTERACTIONS
JTF_RS_GROUP_MEMBERS	Agent Status Report
IEU_SH_SESSIONS	IEU_SH_ACTIVITIES
JTF_RS_RESOURCE_EXTNS_VL	JTF_RS_GROUPS_VL
JTF_RS_GROUP_MEMBERS	JTF_IH_MEDIA_ITEM_LC_SEGS
JTF_IH_MEDIA_ITM_LC_SEG_TYS	JTF_IH_INTERACTIONS
Queue Detail Report	BIX_DM_AGENT_CALL_SUM
Queue Status Report	JTF_IH_MEDIA_ITEM_LC_SEGS
JTF_IH_MEDIA_ITM_LC_SEG_TYS	JTF_IH_MEDIA_ITEMS
JTF_RS_GROUP_MEMBERS	JTF_IH_INTERACTIONS
Agent Group Report	BIX_DM_CALL_SUM
BIX_DM_AGENT_SUM	BIX_DM_GROUP_SUM
BIX_DM_AGENT_SESSION_SUM	BIX_DM_GROUP_SESSION_SUM
Agent by Classification Report	BIX_DM_CALL_SUM
BIX_DM_AGENT_SUM	BIX_DM_GROUP_SUM
BIX_DM_AGENT_SESSION_SUM	BIX_DM_GROUP_SESSION_SUM

Bin/Report Name	Tables/Views Used for Generation
Transactional KPIs -Agent Report	BIX_DM_CALL_SUM
BIX_DM_GROUP_SUM	BIX_DM_AGENT_SUM
BIX_DM_AGENT_ SESSION_SUM	BIX_DM_GROUP_SESSION_SUM
Session Logins Report	BIX_DM_UWQ_AGENT_SUM
BIX_DM_UWQ_ GROUP_SUM	
	Session Durations Report
BIX_DM_UWQ_ AGENT_SUM	BIX_DM_UWQ_GROUP_SUM
Classification Report	BIX_DM_CALL_SUM
Key Performance Comparison by Period Report	BIX_DM_CALL_SUM
Transactional KPIs - Classification Report	BIX_DM_CALL_SUM
BIX_DM_UWQ_ AGENT_SUM	BIX_DM_UWQ_GROUP_SUM
DNIS Report	BIX_DM_CALL_SUM
Campaign Performance Report	BIX_DM_AGENT_SESSBYCAMP_SUM
BIX_DM_CALL_SUM	AMS_CAMPAIGNS_VL
AMS_CAMPAIGN_ SCHEDULES_VL	

Bin/Report Name	Tables/Views Used for Generation
	Campaign Performance by Agent Report
BIX_DM_AGENT_SUM	BIX_DM_GROUP_SUM
BIX_DM_AGENT_SESSBYCAMP_SUM	BIX_DM_GROUP_SESSBYCAMP_SUM
BIX_DM_CALL_SUM	AMS_CAMPAGNS_VL
AMS_CAMPAGN_SCHEDULES_VL	
	Campaign Dialing by Agent Report
BIX_DM_AGENT_SUM	BIX_DM_GROUP_SUM
BIX_DM_AGENT_SESSBYCAMP_SUM	BIX_DM_GROUP_SESSBYCAMP_SUM
BIX_DM_CALL_SUM	AMS_CAMPAGNS_VL
AMS_CAMPAGN_SCHEDULES_VL	
	Campaign Outcomes Report
BIX_DM_AGENT_OUTCOME_SUM	JTF_IH_OUTCOMES_VL
JTF_IH_RESULTS_VL	AMS_CAMPAGNS_VL
AMS_CAMPAGN_SCHEDULES_VL	
	Campaign Outcomes by Agent Report
BIX_DM_AGENT_OUTCOME_SUM	BIX_DM_GROUP_OUTCOME_SUM
JTF_IH_OUTCOMES_VL	JTF_IH_RESULTS_VL
AMS_CAMPAGNS_VL	AMS_CAMPAGN_SCHEDULES_VL
Agent Productivity by Campaign Report	BIX_DM_AGENT_SUM
BIX_DM_GROUP_SUM	BIX_DM_AGENT_SESSBYCAMP_SUM
BIX_DM_GROUP_SESSBYCAMP_SUM	BIX_DM_CALL_SUM

Bin/Report Name	Tables/Views Used for Generation
AMS_CAMPAIGNS_VL	AMS_CAMPAIGN_SCHEDULES_VL
Email Account Report	BIX_DM_EMAIL_SUM
IEM_EMAIL_ACCOUNTS	IEM_ROUTE_CLASSIFICATIONS
Email Account Agent Report	BIX_DM_EMAIL_AGENT_SUM
IEM_EMAIL_ACCOUNTS	JTF_RS_RESOURCE_EXTNS_VL
Email Account Agent Group Report	BIX_DM_EMAIL_AGENT_SUM
BIX_DM_EMAIL_GROUP_SUM	JTF_RS_GROUP_MEMBERS
JTF_RS_RESOURCE_EXTNS_VL	JTF_RS_GROUPS_VL
JTF_RS_GROUPS_DENORM	

Implementation Tasks

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

Topics include:

- [Section 3.1, Defining an Administrator for Oracle Interaction Center Intelligence](#)
- [Section 3.2, Creating an Interaction Center Agent](#)
- [Section 3.3, Creating an Employee](#)
- [Section 3.4, Creating an Employee in CRM Resource Manager](#)
- [Section 3.5, Setting Up Employees as Users](#)
- [Section 3.6, Importing a Resource](#)
- [Section 3.7, Administering Oracle Interaction Center Intelligence](#)

3.1 Defining an Administrator for Oracle Interaction Center Intelligence

Use the following procedure to define an administrator for Oracle Interaction Center Intelligence.

Login

Oracle Forms Applications

Responsibility

System Administrator

Prerequisites

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

Steps

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

The User window appears.

Use the following guidelines to define Oracle Applications usernames:

- 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. In the Responsibilities tab, add the following responsibilities.
 - Interaction Center Intelligence Administrator Apps
 - Interaction Center Intelligence Administrator HTML
 - Interaction Center Intelligence User HTML
 - Interaction Center Intelligence User Apps

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.

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

You may close the Users window.

See Also

- [Section 1.6, Responsibilities](#)
- [Section 3.2, Creating an Interaction Center Agent](#)
- [Section 3.3, Creating an Employee](#)
- [Section 3.4, Creating an Employee in CRM Resource Manager](#)
- [Section 3.5, Setting Up Employees as Users](#)
- [Section 3.6, Importing a Resource](#)
- [Section 3.7.1, Configuring Application Profile Options](#)

3.2 Creating an Interaction Center Agent

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

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

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

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

All Oracle Applications are installed with predefined responsibilities. Instances of the major components that help define a responsibility (data groups, request security groups, menus, and functions) are predefined for Oracle Applications. A system administrator can assign users any of the standard responsibilities provided with Oracle Applications or create new custom responsibilities. The responsibility

key is a unique name for a responsibility. After the responsibility records are saved, the responsibility key cannot be updated. However, the responsibility name can be changed at any time. If a user has more than one responsibility, then the responsibility name appears in the Responsibilities window after a user signs on to the Oracle Application.

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

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

1. Create an employee.
2. Create an Oracle Applications user account.
3. Create a resource for the employee.
4. Configure system profile options.
5. Configure resource roles and assign responsibilities for the newly created resource.

6. Create group member roles and usage for an agent.

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

7. Configure interaction center parameters for the agent.

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

See Also

- [Section 3.1, Defining an Administrator for Oracle Interaction Center Intelligence](#)
- [Section 3.3, Creating an Employee](#)
- [Section 3.4, Creating an Employee in CRM Resource Manager](#)
- [Section 3.5, Setting Up Employees as Users](#)
- [Section 3.6, Importing a Resource](#)
- [Section 3.7.1, Configuring Application Profile Options](#)

- *Oracle Interaction Center Implementation Guide*

3.3 Creating an Employee

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

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

Login

Oracle Forms Applications

Responsibility

HRMS Manager

Prerequisites

- Administrative user must be created.

Steps

1. In the Navigator window, on the Functions tab, choose **People > Enter and Maintain**.
The Find Person window appears.
2. Click **New**.
The People window appears.
3. Enter the appropriate information for the employee.

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

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

See Also

- [Section 3.2, Creating an Interaction Center Agent](#)
- [Section 3.4, Creating an Employee in CRM Resource Manager](#)
- [Section 3.5, Setting Up Employees as Users](#)
- [Section 3.6, Importing a Resource](#)
- [Section 3.7.1, Configuring Application Profile Options](#)
- *Managing People Using Oracle HRMS Release 11i*

3.4 Creating an Employee in CRM Resource Manager

Use this procedure to create an employee when you have a shared Oracle HRMS License or if Oracle HRMS is not installed. This procedure populates the same database tables as the **Enter and Maintain** procedure in Oracle Human Resource Management Systems.

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

Login

Oracle Forms Applications

Responsibility

CRM Resource Manager

Prerequisites

None

Steps

1. In the Navigator window, on the Functions tab, choose **Maintain Employee > Employee**.
The Find Person window appears.
2. Click **New**.
The People window appears.
3. Enter the appropriate information for the employee.

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

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

See Also

- [Section 3.1, Defining an Administrator for Oracle Interaction Center Intelligence](#)
- [Section 3.2, Creating an Interaction Center Agent](#)
- [Section 3.3, Creating an Employee](#)
- [Section 3.5, Setting Up Employees as Users](#)

3.5 Setting Up Employees as Users

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

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

Login

Oracle Forms Applications

Responsibility

System Administrator

Prerequisites

None

Steps

1. In the Navigator window, on the Functions tab, choose **Security > User > Define**.
The User window appears.
2. In the User Name field, enter a user name for the account. Use the following guidelines to define Oracle Applications usernames:
 - Alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
 - Character sets that are supported by your operating system.

3. In the Password field, enter a password for the user account. Use the following guidelines for creating passwords for user accounts.
 - Minimum of 5 characters.
 - Maximum of 100 characters.
 - Alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
4. Press **Tab**.

You will return to the Password field. You will need to reenter the password for validation purposes. Once you reenter the password, press Tab again.
5. In the Person field, select the employee to be associated with the username and password.
6. In the Responsibilities tab, add the following responsibilities.
 - Interaction Center Intelligence Administrator Apps
 - Interaction Center Intelligence Administrator HTML
 - Interaction Center Intelligence User HTML
 - Interaction Center Intelligence User Apps
 - Universal Work Queue Administration
 - Call Center HTML Administrator
 - CRM HTML Administrator

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

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

See Also

- [Section 3.1, Defining an Administrator for Oracle Interaction Center Intelligence](#)
- [Section 3.2, Creating an Interaction Center Agent](#)

- [Section 3.3, Creating an Employee](#)
- [Section 3.4, Creating an Employee in CRM Resource Manager](#)
- [Section 3.5, Setting Up Employees as Users](#)
- [Section 3.6, Importing a Resource](#)
- *Oracle Applications Systems Administrator's Guide*

3.6 Importing a Resource

Use this procedure to import an employee as a resource.

Login

Oracle Forms Applications

Responsibility

CRM Resource Manager

Prerequisites

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

Steps

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

The Selection Criterion window appears.

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

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

4. Click **Search**.

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

5. Deselect the boxes for the employees that you do not want imported as a resource.
6. Click **Create Resource**.
The Default Values window appears.
7. Click **OK**.
The Selected Resources window appears. The Comments field indicates whether the resource is a new record, duplicate record, or duplicate record with a new role definition. The Select boxes are automatically selected.
8. Click **Save Resource**.
9. Click **Details**.
10. Click the Roles tab.
11. In the Roles Type field, select **Call Center**.
12. In the Role field, enter **Call Center Agent**.
13. Select the Interaction Center tab.
14. In the Interaction Center field, select the appropriate server group.
15. Enter the telephony parameters.
The parameters that you enter will depend on which telephony parameters are required for the CTI middleware you are using.
16. Click **Save**.

See Also

- [Section 3.2, Creating an Interaction Center Agent](#)
- [Section 3.3, Creating an Employee](#)
- [Section 3.4, Creating an Employee in CRM Resource Manager](#)
- [Section 3.5, Setting Up Employees as Users](#)

3.7 Administering Oracle Interaction Center Intelligence

Topics include:

- [Section 3.7.1, Configuring Application Profile Options](#)
- [Section 3.7.2, Enabling Multi-Currency Support](#)

- [Section 3.7.3, Configuring Component Security](#)
- [Section 3.7.4, Setting Up Application Dependencies](#)
- [Section 3.7.5, Media Item Data Availability by Mode](#)
- [Section 3.7.6, Establishing Inbound Telephony Performance Goals](#)
- [Section 3.7.7, Defining Outbound Telephony Performance Goals](#)
- [Section 3.7.8, Setting eMail Center Performance Goals](#)
- [Section 3.7.9, Defining Connect and Contact Outcomes](#)
- [Section 3.7.10, Defining Positive and Negative Results](#)
- [Section 3.7.11, Running ICI Concurrent Programs](#)
- [Section 3.7.12, Running Concurrent Requests for UWQ](#)
- [Section 3.7.13, Running CCT Concurrent Programs](#)

3.7.1 Configuring Application Profile Options

A profile option is a parameter that controls and affects the way an application functions. The procedure for setting up and changing profile options is the same for all Oracle Applications. The administrative user must have the responsibility of System Administrator. For information about how to configure profile options and a full description of each option, see [Appendix A](#).

Note: If an Oracle Interaction Center Intelligence profile option is not listed below, it is either intended for use by Oracle Support Services, reserved for future use, or obsolete. Verify that the value of an Oracle Interaction Center Intelligence profile option that is not in use is set to No or null

The following is a list of the application profile options that apply to the configuration of Oracle Interaction Center Intelligence:

Site Level Profile Options

- BIX: Preferred Currency
- BIX: ConversionType
- BIX: Maximum Roll Days

- BIX: Call Center Agent Hourly Wage
- BIX: Default Chunk Size
- IEU: Session History Logging

User Level Profile Options

- BIX: Default Agent Group
- JTF_PROFILE_DEFAULT_CURRENCY
- BIX: Time Range for BIX Reports
- BIX: Reporting Calendar

See Also

- Oracle Applications Systems Administrator's Guide
- [Appendix A](#)

3.7.2 Enabling Multi-Currency Support

ICI allows reporting in multiple currencies.

Login

Oracle Forms Application

Responsibility

Interaction Center Intelligence Administrator Apps

Note: Users need to use Interaction Center Intelligence User Apps responsibility to update the user level profiles.

Prerequisites

Before enabling multi-currency support, the JTF_Profile_Default_Currency profile option needs to be defined for each user.

Steps

1. Define and enable currencies you want to use.

Oracle Applications predefines all ISO currencies but the administrator can define as many additional currencies as needed.

2. Enter the daily rates needed for conversion.
3. In the Navigator window, on the Functions tab, choose **Profiles**.
The Profile window appears.
4. Search for and update the BIX: Conversion Type profile option.
5. Search for and update the BIX: Maximum Roll Days profile option.

This is a site level profile which is set up by the administrator to specify what rate type should be used for currency conversion (e.g., Spot or Corporate).

This is a site level profile. The programs make use of this profile to convert currency based on the following logic:

If BIX:Maximum Roll Days is a positive number, the API will look backward from the conversion date for the most recent date for which a rate is defined with the given currencies and conversion type. It will go backward up to the maximum roll days specified. If it cannot find a rate, the API will raise an error. Otherwise, it will return the rate.

If BIX:Maximum Roll Days is a negative number, the API will try to look backward without any date limit for a rate defined with the given currencies and conversion type. If it cannot find a rate, the API will raise an error. Otherwise, it will return the rate.

If BIX:Maximum Roll Days is zero, the API will not try to look backward for a conversion rate. Instead, it will raise an error.

See Also

- [Appendix A](#)

3.7.3 Configuring Component Security

Interaction Center Intelligence allows you to configure your component security.

Login

Oracle HTML Applications

Responsibility

System Administrator

Steps

1. Click the **Design** tab.
2. Click the **Declarative Components** tab.
3. Click **Component Security**.

There are two available options. The Component to Responsibilities option allows you to assign a component to multiple responsibilities. The Responsibility to Components option allows you to assign a responsibility access to multiple components.

4. Pick the appropriate option and then click **Next**.

If you select Component to Responsibilities...

Then...

1. Select the application code (Interaction Center Intelligence - BIX) and the component code for which you want to assign privileges.
2. Click **Next**.
3. Select the responsibility application code (Interaction Center Intelligence - BIX).
4. Select the appropriate responsibilities. Make sure your selection appears in the Selected Responsibilities section.
5. Click **Update**.

If you select Responsibility to Components...

Then...

1. Select the responsibility application code (Interaction Center Intelligence - BIX) and the responsibility for which you want to assign components.
 2. Click **Next**.
 3. Select the component application code (Interaction Center Intelligence - BIX).
 4. Select the appropriate components. Make sure your selection appears in the Selected Components section.
 5. Click **Update**.
-

3.7.4 Setting Up Application Dependencies

ICI pulls in some data from other modules like Telesales and Marketing to enable some of the cross-functional reports that it produces. However some or all of these modules may not be installed in an organization. The summary programs will collect data based on whether or not these modules are installed. This is meant to be an organization-wide set up. Similarly to performance goals, these settings can be changed at a later date. If settings are modified, the summary data which was previously compiled will not be affected.

Login

Oracle HTML Applications

Responsibility

Interaction Center Intelligence Administrator HTML

Prerequisites

None

Steps

1. Click on the Setup tab.
2. In the side panel, click **Select Application Dependencies**.
3. Select the applications which are implemented.

You have the following options:

- Oracle eMail Center
- Oracle Advanced Inbound
- Oracle Advanced Outbound
- Oracle TeleService
- Oracle TeleSales

4. Click **Update**.

3.7.5 Media Item Data Availability by Mode

The following table identifies the availability of media data items by mode.

Note: If a media data item is unavailable in a particular mode, the report when run, will not contain data for that item.

The following table lists the availability of media items by active, passive, and enhanced mode.

Media Item Data	Inbound Active	Inbound Passive (Enhanced) w/ Route Point	Inbound Passive w/o Route Point
MEDIA_ITEM_TYPE	TELE_INB	TELE_INB	TELE_DIRECT
DIRECTION	Inbound	Inbound	Inbound
REROUTE	Yes	N/A	N/A
MEDIA_ABANDON_FLAG	Yes	Yes	No
SERVER_GROUP_ID	Yes	Yes	Yes
ANI	Yes	Yes	Yes
DNIS	Yes	Yes	N/A
CLASSIFICATION	Yes	Yes	Yes
START_DATE_TIME	Yes	Yes	Yes
END_DATE_TIME	Yes	Yes	Yes
DURATION	Yes	Yes	Yes

The following table lists the availability of media items by direct, manual, preview, and progressive mode.

Media Item Data	Inbound Direct	Manual Dial	Preview	Progressive
MEDIA_ITEM_TYPE	TELE_DIRECT	TELE_MANUAL	TBD by AO	TBD by AO
DIRECTION	Outbound	Outbound	Outbound	Outbound
REROUTE	N/A	N/A	N/A	N/A
MEDIA_ABANDON_FLAG	N/A	N/A	N/A	N/A
SERVER_GROUP_ID	Yes	Yes	Yes	Yes

Media Item Data	Inbound Direct	Manual Dial	Preview	Progressive
ANI	Yes	Yes	Yes	Yes
DNIS	N/A	N/A	Yes	Yes
CLASSIFICATION	Yes	Yes	Yes	Yes
START_DATE_TIME	Yes	Yes	Yes	Yes
END_DATE_TIME	Yes	Yes	Yes	Yes
DURATION	Yes	Yes	Yes	Yes

The following table lists the availability of media items by web callback, internal, and unsolicited mode.

Media Item Data	Web Callback	Internal	Unsolicited
MEDIA_ITEM_TYPE	TELE_WEB	TELE_INTERNAL	UNSOLICITED
DIRECTION	Inbound	N/A	N/A
REROUTE	Yes	N/A	N/A
MEDIA_ABANDON_FLAG	N/A	N/A	N/A
SERVER_GROUP_ID	Yes	Yes	Yes
ANI	Yes	Yes	Yes
DNIS	N/A	Yes	N/A
CLASSIFICATION	Yes	Yes	Yes
START_DATE_TIME	Yes	Yes	Yes
END_DATE_TIME	Yes	Yes	Yes
DURATION	Yes	Yes	Yes

3.7.6 Establishing Inbound Telephony Performance Goals

ICI allows administrators to pre-seed some key performance indicator (KPI) goals. These goals will be used while running some of the KPI related ICI reports. This gives the business users the ability to analyze how their agents or interaction centers performed against the expected performance measures. This set up is intended to be performed for the entire organization. It is recommended that careful thought be put into the value selection for these goals. These settings can be

changed at a later date. If settings are modified, the summary data which was previously compiled will not be affected.

Use this procedure to indicate the performance goals for inbound telephony.

Login

Oracle HTML Applications

Responsibility

Interaction Center Intelligence Administrator HTML

Prerequisites

None

Steps

1. Click the Setup tab.
2. In the side panel, click **Define Goals for Telephony**.
The Define Goals for Telephony page appears.
3. Select All or a specific inbound call classification and then click **Go**.
The Define Goals for Telephony page refreshes.
4. In the Inbound Telephony section, enter the performance goals for the selected classification.

The following table describes the inbound telephony performance goals.

Performance Goal	Description
Service Level	The percentage of calls answered within a certain time, in seconds.
Minimum Call Threshold	The minimum call duration, in seconds, for a call to be counted.
Inbound Abandoned Rate	The maximum percentage of abandoned calls.

5. Click **Update**.

See Also

- [Section 3.7.7, Defining Outbound Telephony Performance Goals](#)

- [Section 3.7.8, Setting eMail Center Performance Goals](#)

3.7.7 Defining Outbound Telephony Performance Goals

ICI allows administrators to pre-seed some key performance indicator (KPI) goals. These goals will be used while running some of the KPI related ICI reports. This gives the business users the ability to analyze how their agents or interaction centers performed against the expected performance measures. This set up is intended to be performed for the entire organization. It is recommended that careful thought be put into the value selection for these goals. These settings can be changed at a later date. If settings are modified, the summary data which was previously compiled will not be affected.

Use this procedure to indicate the performance goals for outbound telephony.

Login

Oracle HTML Applications

Responsibility

Interaction Center Intelligence Administrator HTML

Prerequisites

None

Steps

1. Click the Setup tab.
2. In the side panel, click **Define Goals for Telephony**.
The Define Goals for Telephony page appears.
3. Select All or a specific inbound call classification and then click **Go**.
The Define Goals for Telephony page refreshes.
4. In the outbound telephony section, enter the performance goals for the selected classification.

The following table describes the inbound telephony performance goals.

Performance Goal	Description
Outbound Abandoned Rate	The maximum percentage of abandoned calls.

5. Click **Update**.

See Also

- [Section 3.7.6, Establishing Inbound Telephony Performance Goals](#)
- [Section 3.7.8, Setting eMail Center Performance Goals](#)

3.7.8 Setting eMail Center Performance Goals

ICI allows administrators to pre-seed some key performance indicator (KPI) goals. These goals will be used while running some of the KPI related ICI reports. This gives the business users the ability to analyze how their agents or interaction centers performed against the expected performance measures. This set up is intended to be performed for the entire organization. It is recommended that careful thought be put into the value selection for these goals. These may be changed at any later date, but the summary data which is collected until that date will still be based on the prior performance goals.

Note: If eMail Center is not being used, setup of these goals is not required.

Use this procedure to indicate the performance goals for inbound telephony.

Login

Oracle HTML Applications

Responsibility

Interaction Center Intelligence Administrator HTML

Prerequisites

None

Steps

1. Click the Setup tab.
2. In the side panel, click **Define Goals for Email Center**.
The Define Goals for Email Center page appears.
3. Select All or a specific email classification and then click **Go**.
The Define Goals for Email Center page refreshes.
4. In the Email section, enter the performance goals for the selected classification.
The following table describes the eMail Center performance goals.

Performance Goal	Description
Service Level	The percentage of e-mails answered within a certain time, in hours.

5. Click **Update**.

See Also

- [Section 3.7.6, Establishing Inbound Telephony Performance Goals](#)
- [Section 3.7.7, Defining Outbound Telephony Performance Goals](#)

3.7.9 Defining Connect and Contact Outcomes

Once an interaction center is done with a call, a wrap-up of the interaction is performed using the customer screen pop. The agent can then associate the interaction with certain outcomes, results, and reasons. For intelligent reporting, ICI allows interaction center administrators to map outcomes and results to connects and positive responses. The administrator can decide if the outcome of "answering machine" or "ring no answer" constitute a "connect". Whereas, an outcome of "busy" constitutes a "non-connect". This mapping allows ICI to report on the percentage of calls were "connects" or "contacts".

Use this procedure to indicate whether an outcome is considered a connect or contact for the purpose of Interaction Center Intelligence bins and reports.

Login

Oracle HTML Applications

Responsibility

Interaction Center Intelligence Administrator HTML

Prerequisites

None

Steps

1. Click the Setup tab.
2. In the side panel, click **Configure Outcomes**.
The Configure Outcomes page appears.
3. For each outcome, indicate whether it is a connect, contact, or neither.
4. Click **Update**.

See Also

- [Section 3.7.10, Defining Positive and Negative Results](#)

3.7.10 Defining Positive and Negative Results

Results can be mapped to "positive response". This mapping allows ICI to report on the percentages of positive responses.

Use this procedure to indicate whether a result is considered positive or negative for the purpose of Interaction Center Intelligence bins and reports.

Login

Oracle HTML Applications

Responsibility

Interaction Center Intelligence Administrator HTML

Prerequisites

None

Steps

1. Click the Setup tab.
2. In the side panel, click **Configure Results**.

The Configure Results page appears.

3. For each result, indicate whether it is a positive or negative response.
4. Click **Update**.

See Also

- [Section 3.7.9, Defining Connect and Contact Outcomes](#)

3.7.11 Running ICI Concurrent Programs

There are four pre-seeded concurrent programs in Oracle Interaction Center Intelligence. They are:

- Populate Interaction Center Intelligence Calls Summary
- Populate Interaction Center Intelligence UWQ Summary
- Populate Interaction Center Intelligence eMail Summary Tasks
- Populate Interaction Center Intelligence Session Summary Tables

Use this procedure to run ICI concurrent programs.

Login

Oracle Forms Applications

Responsibility

Interaction Center Intelligence Administrator Apps

Prerequisites

None

Steps

1. In the Navigator window, on the Functions tab, choose **Requests**.
The Find Requests page appears.
2. Click **Submit a New Request**.
The Submit a New Request dialog box appears.
3. Select **Single Request**.
4. Click **OK**.

The Submit Request page appears. The Submit Request page consists of three sections:

- Run the Requests...
- At these Times...
- Upon Completion...

The Run the Requests... section allows you to select the request, enter parameters, establish the language, and copy from a previous run.

5. In the Name field, click the ellipsis to perform a lookup.

The Report page appears.

6. Select the appropriate ICI concurrent program. The programs available for selection are:

To Run...	Select this...
ICI Calls Summary	Populate Interaction Center Intelligence Calls Summary
UWQ Summary	Populate Interaction Center Intelligence UWQ Summary
eMail Summary Tasks	Populate Interaction Center Intelligence eMail Summary Tasks
ICI Session Summary Tables	Populate Interaction Center Intelligence Session Summary Tables

7. Click **OK**.

The Parameters dialog box appears.

8. In the Start Date field, enter a date to indicate the beginning of the date range for the request to be run. You must use the the following format:
DD-MMM-YYYY H:MM:S.
9. The current date will display as the default in the End Date field. If you need to adjust the date, enter the desired end date using the same format as required for the start date.
10. Click **OK**.
11. In the At these Times... section, select **Schedule**. You can specify when the request will run. Click **OK** when finished.

To Schedule...	Select this...
ASAP	As Soon As Possible
One time only	Once
Periodic runs	Periodically
Select days	On Specific Days
Other	Advanced

12. In the Upon Completion... section, click **Options** to specify the output conditions for the request. You can specify who to notify upon completion as well as print output (print to file or device) and language. Click **OK** when finished.

13. Click **Submit**.

This will run the concurrent program. It is recommended that as the administrator, you monitor the log files after each run to ensure the requests completed successfully.

- [Section 3.7.12, Running Concurrent Requests for UWQ](#)
- [Section 3.7.13, Running CCT Concurrent Programs](#)

3.7.12 Running Concurrent Requests for UWQ

Oracle Universal Work Queue uses a concurrent program to clean up inactive sessions and activities which might be left in an "active" state, for example, system failure or power failure. ICI administrators should work with the UWQ administrators to ensure that the program, Session History - UWQ Cleanup Process is set up to run periodically.

Use this procedure to verify the set up and run UWQ concurrent programs.

Login

Oracle Forms Applications

Responsibility

Universal Work Queue Administration Responsibility

Prerequisites

None

Steps

1. In the Navigator window, on the Functions tab, choose **Concurrent Requests > Run**.

The Submit a New Request dialog box appears.

2. Click **Single Request**.

3. Click **OK**.

The Submit Request page appears. The Submit Request page consists of three sections:

- Run the Requests...
- At these Times...
- Upon Completion...

The Run the Requests... section allows you to select the request, enter parameters, establish the language, and copy from a previous run.

4. In the Name field, click the ellipsis and perform a lookup.

The Report page appears.

5. Select **Sessions History-UWQ Cleanup Process**.

6. Click **OK**.

7. Click **OK**.

8. In the At these Times... section, select **Schedule**. You can specify when the request will run. Click **OK** when finished.

To Schedule...	Select this...
ASAP	As Soon As Possible
One time only	Once
Periodic runs	Periodically
Select days	On Specific Days
Other	Advanced

9. In the Upon Completion... section, click **Options** to specify the output conditions for the request. You can specify who to notify upon completion as well as print output (print to file or device) and language. Click **OK** when finished.

10. Click **Submit**.

This will run the concurrent program. It is recommended that as the administrator, you monitor the log files after each run to ensure the requests completed successfully.

See Also

- [Section 3.7.11, Running ICI Concurrent Programs](#)
- [Section 3.7.13, Running CCT Concurrent Programs](#)

3.7.13 Running CCT Concurrent Programs

In Oracle Call Center and Telephony, interaction history data is not populated real-time. Before any ICI reports are executed, as the administrator, you will have to run the following CCT concurrent programs. After the first run, the programs will automatically be scheduled. The administrator is responsible for making sure that the programs are restarted in the event of database failure or other exception conditions. The programs that need to be run are:

- Close Media Items
- Timeout Media Items

The default value for close media items is 15 minutes. The default value for timeout media items is 24 hours. The system administrator can modify these parameters if necessary, when the jobs are submitted.

Use this procedure to verify the set up and run CCT concurrent programs.

Login

Oracle Forms Applications

Responsibility

Interaction Center Intelligence Admin Apps

Prerequisites

None

Prerequisites

None

Steps

1. In the Navigator window, on the Functions tab, choose **Requests**.

The Find Requests page appears.

2. Click **Submit a New Request**.

The Submit a New Request dialog box appears.

3. Select **Single Request**.

4. Click **OK**.

The Submit Request page appears. The Submit Request page consists of three sections:

- Run the Requests...
- At these Times...
- Upon Completion...

The Run the Requests... section allows you to select the request, enter parameters, establish the language, and copy from a previous run.

5. In the Name field, click the ellipsis to perform a lookup.

The Report page appears.

6. Select the appropriate CCT concurrent program. The programs available for selection are:

To run....	Select this...
	Close Media Items
	Timeout Media Items

7. Click **OK**.

The Parameters dialog box appears.

8. Identify the appropriate parameter for the request.

If the Program is...	Select this...
Close Media Item	Interval to close media items in minutes. The default is 15 minutes.
Timeout Media Items	Timeout interval in hours. The default is 24 hours.

9. Click **OK**.

10. In the At these Times... section, select **Schedule**. You can specify when the request will run. Click **OK** when finished.

To Schedule...	Select this...
ASAP	As Soon As Possible
One time only	Once
Periodic runs	Periodically
Select days	On Specific Days
Other	Advanced

11. In the Upon Completion... section, click **Options** to specify the output conditions for the request. You can specify who to notify upon completion as well as print output (print to file or device) and language. Click **OK** when finished.

12. Click **Submit**.

This will run the concurrent program. It is recommended that as the administrator, you monitor the log files after each run to ensure the requests completed successfully.

See Also

- [Section 3.7.11, Running ICI Concurrent Programs](#)
- [Section 3.7.12, Running Concurrent Requests for UWQ](#)

Diagnostics and Troubleshooting

This section contains instructions on error corrections and workarounds for problems that you may encounter in the implementation of Oracle Interaction Center Intelligence.

Topics include:

- [Section 4.1, "Functional FAQs"](#)
- [Section 4.2, "Technical FAQs"](#)

4.1 Functional FAQs

Was Interaction Center Intelligence (ICI) renamed recently?

Yes, Interaction Center Intelligence was renamed from Call Center Intelligence in 11iR5 to align itself with the Interaction Center product family.

Who is the primary audience for ICI?

ICI is an operational call center reporting solution focusing on telephony data. Call center supervisors and managers are the primary users of ICI; however, agents can also use ICI for self monitoring and motivation.

Does ICI go after real time data?

Yes, real time reports query directly from the transactional systems. But ICI historical reports employ an architecture where OLTP data is collected into summary tables, so a set of concurrent requests need to be executed before running reports.

How current are historical reports? Are time series supported?

Historical data may be collected in time buckets as small as half an hour. If you set up ICI collection programs to run every half hour, your historical reports will at most be half an hour behind.

When would you implement ICI?

ICI is the only operational reporting solution for OTM in active mode; similar to a switch reporting solution for a switch. Typically the transactional business application e.g., TeleService or TeleSales, is implemented; followed closely by AI or AO; after which ICI is implemented

Why are two OTM passive modes supported?

In OTM active mode, OTM is performing the routing. In OTM passive mode, the ACD is performing the routing. OTM has two passive modes based on the middleware: CT-Connect passive and Cisco-ICM passive. Route point monitoring is supported by CT-Connect and NOT supported by Cisco-ICM.

What measures and reports are available if OTM is passive?

In CT-Connect passive mode, there is no visibility to route and queue times as the ACD is performing this task. Therefore, measures like ASA, Average Caller Transaction Time, Calls Handled by Primary Destination are not available.

In Cisco-ICM passive mode, route point monitoring is not supported and there is no visibility till the call is with the agent. Therefore, additional measures like Longest Call Waiting, Calls Offered, Calls Abandoned, Average Abandon Time, Calls within Service Level, Average Wait to Abandon, Service Level are not available.

What are ICI's transactional dependencies?

ICI is pre-integrated with Oracle TeleService, Oracle TeleSales and Oracle Universal Work Queue.

What are your TeleService dependencies?

ICI derives its Service Request information from TeleService. Specifically, service requests created, open and closed. ICI looks into Interaction History to find agents and interaction times to match service requests created, opened or closed.

What are your TeleSales dependencies?

ICI derives its Leads and Opportunity information from TeleSales. Specifically, leads created, updated, lead amounts and opportunities created, updated, won,

won opportunity amounts. ICI looks into Interaction History to find agents and interaction times to match leads and opportunities created, updated or won.

What are your Universal Work Queue dependencies?

ICI derives its login and logout times, and the break reasons from Universal Work Queue.

What type of data security is supported?

As in all Oracle e-Business applications, responsibilities limit the choice of functions available to a user. In addition, ICI supports data security dictated by a user's position in the agent group hierarchy. ICI supports managers and members.

Managers of agent groups have access to any agent group or agent under them. Members of agent groups have access only to their own data.

Are there any Oracle Discoverer workbooks in this release?

At present, there are no workbooks in ICI.

Does ICI provide multi-site support?

Yes, ICI supports multiple call center sites setup on the same database instance.

Does ICI provide multi-currency support?

Yes, ICI supports daily rate multiple currencies.

4.2 Technical FAQs

Some bins and reports do not bring up any data.

Check the base transaction tables to see if data should be brought up in the reports. Try running some simple queries against the transaction tables using the same query criteria and parameters as the bin and report in question. If this brings up data, but the bin and report does not then perform the other checks mentioned below:

- Does the summary table have data?
- Were there any errors in running the concurrent programs?
- Have you set yourself up with a default group, as explained in the Setup section?

Graph is not displayed

- Check if the post-install steps for the Oracle CRM Foundation product (JTF) were performed correctly.
- Make sure the Apache web server is configured to use the correct display server.
- Make sure the display server up and running.
- Make sure you are using JDK 1.2.2 or a higher version.

If all the setup steps look okay, try restarting the Apache web server.

Some bins/reports give "invalid permission error"

Log on to the CRM Foundation HTML (JTF) page as the administrator and grant the components to the appropriate responsibilities.

Unable to log on to Oracle Applications (Forms)

- Make sure the Forms server is up and running.
- Make sure the database is up and running.
- Make sure you are using the correct version of JInitiator.
- If JInitiator gives a "Out of Memory" error, try clearing the contents of the jcache directory (typically located under C:\Program Files\Oracle\JInitiator\jcache).
- Try restarting the Forms Server.

Unable to log on to Oracle Applications (HTML/JTF login)

- Make sure the Apache web server is up and running.
- If any new patches were applied recently, make sure you clear out the Java cache and restart the Apache web server.
- Try restarting the Apache web server.

Oracle Interaction Center Intelligence Profile Options

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

Topics include:

- [Appendix A.1, "Profile Values"](#)
- [Appendix A.2, "Setting System Profile Options"](#)
- [Appendix A.3, "Application Profile Options"](#)
- [Appendix A.4, "User Profile Options"](#)

A.1 Profile Values

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

The profile option description includes the following information:

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

- **Settings:** Lists available values, a description of each value, and any usage considerations.
- **Default Value:** Indicates the default profile option value if no value has been set. Depending on the how the profile option is used in the application, the default may be a predefined value or it may be determined dynamically at runtime.

A.2 Setting System Profile Options

The procedure for setting up and changing system profile options is the same for all Oracle Applications.

Use this procedure to set or change profile options.

Login

Oracle Forms Applications

Responsibility

System Administrator

Prerequisites

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

Steps

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

The Find System Profile Values window appears.

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

- **Site**

- **Application**

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

- **Responsibility**

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

- **User**

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

3. In the Profile field, enter the profile name (e.g., BIX: Maximum Roll Days), or perform a lookup by entering the application prefix along with the percent symbol. For example, to locate all Oracle Interaction Center Intelligence profiles, you would enter "BIX%".

4. Click **Find**.

The profiles are displayed in the System Profile Values window.

5. Select a value from the list.

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

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

A.3 Application Profile Options

Topics include:

- [Appendix A.3.1, "BIX: Preferred Currency"](#)
- [Appendix A.3.2, "BIX: Conversion Type"](#)
- [Appendix A.3.3, "BIX: Maximum Roll Days"](#)
- [Appendix A.3.4, "BIX: Call Center Agent Hourly Wage"](#)
- [Appendix A.3.5, "BIX: Delete Chunk Size"](#)
- [Appendix A.3.6, "IEU: Queue: Session History Logging"](#)

See Also

- Oracle Interaction Center Intelligence User Guide
- Oracle Applications Systems Administrator's Guide

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

A.3.1 BIX: Preferred Currency

This is the main currency that the customer conducts business in. This is also referred to "Consolidated Currency". This is a site level profile.

Note: Users need to use the Interaction Center Intelligence User Apps responsibility to update the user level profiles.

Use this profile option to identify the currency the main currency with which business is conducted.

Required

No

Personal Profile Values

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

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

System Profile Values

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

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

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

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

A.3.2 BIX: Conversion Type

ICI allows for reporting in multiple currencies. This profile option is used to specify what rate type should be used for currency conversion, for example, Spot or Corporate. This is a site level profile.

Required

No

Personal Profile Values

View?	No
Update?	No

System Profile Values

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

A.3.3 BIX: Maximum Roll Days

This profile option is used to determine the basis for which currency is converted. ICI performs the conversion based on the following logic:

If BIX:Maximum Roll Days is assigned a positive number, the API will look backward from the conversion date for the most recent date for which a rate is defined with the given currencies and conversion type. It will go backward up to the maximum roll days specified. If it cannot identify a rate, the API will generate an error. Otherwise, it will return the rate.

If BIX:Maximum Roll Days is assigned a negative number, the API will try to look backward without any date limit for a rate defined with the given currencies and conversion type. If it cannot identify a rate, the API will generate an error. Otherwise, it will return the rate.

If BIX:Maximum Roll Days is zero, the API will not try to look backward for a conversion rate. Instead, it will generate an error.

Note: Users need to use the Interaction Center Intelligence User Apps responsibility to update the user level profiles.

This is a site level profile.

Required

No

Personal Profile Values

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

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

System Profile Values

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

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

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

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

A.3.4 BIX: Call Center Agent Hourly Wage

This profile is used by the summary program to calculate the cost of calls. The Key Comparison by Period report uses hourly wage for calculating costs. This is a site level profile.

Required

No

Personal Profile Values

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

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

System Profile Values

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

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

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

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

A.3.5 BIX: Delete Chunk Size

The concurrent programs use this profile to decide on the number of records that need to be inserted into the summary tables, before a database commit is performed. The administrator needs to decide on an optimum number for this profile depending on the rollback segment space. The higher this number, the better it is for performance, but too high a number could result in the rollback segments running out of space. If this profile is not set, then a default of 100 is used by the summary programs. This is a site level profile.

Required

No

Personal Profile Values

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

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

System Profile Values

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

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

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

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

A.3.6 IEU: Queue: Session History Logging

This is a site level profile which is used by the UWQ OLTP application, but it affects the functioning of ICI as well. This profile needs to be set to **Yes** to capture UWQ session information into IEU tables, which are used by ICI.

When set to **No**, session related data will not be written to the IEU tables.

Required

No

Personal Profile Values

View?	No
Update?	No

System Profile Values

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

A.4 User Profile Options

Topics include:

- [Appendix A.4.1, "BIX: Default Agent Group"](#)
- [Appendix A.4.2, "JTF_Profile_Default_Currency"](#)
- [Appendix A.4.3, "BIX: Time Range for BIX Reports"](#)
- [Appendix A.4.4, "BIX: Time Reporting Calendar"](#)

A.4.1 BIX: Default Agent Group

Each user will be associated with a default group. If the user is not set up with a default group, some of the bins and reports may not show any data. This will have to be done individually by each user as this is a user level profile.

Some of the bins and reports restrict data based on the user's default group. These components show data only for (1) all agents in the user's default group; and (2) all immediate child groups of the user's default group. In a future release, this behavior will be enhanced and extended to all bins and reports.

Note: Users must be assigned the Interaction Center Intelligence User Apps responsibility. They will need to log in, using this responsibility, to update user level profile options.

Use this profile option to associate a user with a default group.

Required

No

Personal Profile Values

View?	Yes
Update?	Yes

System Profile Values

Site?	No
Application?	No
Responsibility?	No
User?	No

A.4.2 JTF_Profile_Default_Currency

The default currency in which the reports will display the currency columns. This is the profile that users should change if they want to change the currency in which their reports are displayed.

Note: Users must be assigned the Interaction Center Intelligence User Apps responsibility. They will need to log in, using this responsibility, to update user level profile options.

Use this profile option to set the default currency that will display.

Required

No

Personal Profile Values

View?	Yes
-------	-----

Update?	Yes
---------	-----

System Profile Values

Site?	No
Application?	No
Responsibility?	No
User?	No

A.4.3 BIX: Time Range for BIX Reports

Some of the call related reports show data broken down to a certain period (half hour, 1 hour etc.). This profile will help the user customize the reports based on what time range they want to see the data broken down by. This is a user level profile.

Note: Users must be assigned the Interaction Center Intelligence User Apps responsibility. They will need to log in, using this responsibility, to update user level profile options.

Use this profile option to specify the interval of time for which the data on the reports represents.

Required

No

Personal Profile Values

View?	Yes
Update?	Yes

System Profile Values

Site?	No
-------	----

Application?	No
Responsibility?	No
User?	No

A.4.4 BIX: Time Reporting Calendar

The BIX: Reporting Calendar profile option is used to determine the type of calendar to be used for reporting. For example, reporting can be done based on the Gregorian calendar or the company's fiscal calendar.

Use this profile option to establish the reporting calendar that will be used for reporting.

Note: Users must be assigned the Interaction Center Intelligence User Apps responsibility. They will need to log in, using this responsibility, to update user level profile options.

Use this profile option to specify the interval of time for which the data on the reports represents.

Required

No

Personal Profile Values

View?	Yes
Update?	Yes

System Profile Values

Site?	No
Application?	No
Responsibility?	No
User?	No
