

Oracle® Email Center

Implementation Guide

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Oracle Email Center Implementation Guide, Release 11i

Part No. B10179-05

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Send Us Your Comments

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Preface

Intended Audience

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

See Related Documents on page x for more Oracle Applications product information.

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Structure

- 1 Introduction
- 2 Product Description
- 3 Before You Begin

4 Implementation Overview

5 Implementation Tasks

6 Administration Tasks

7 Integrating Oracle Email Center with Oracle E-Business Applications

8 Diagnostics and Troubleshooting

This section contains material useful in diagnosing and troubleshooting the implementation of Oracle Email Center.

9 Oracle Email Center Implementation Worksheets

Related Documents

Email Center User Guide

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 an Oracle Applications form 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.

Introduction

This chapter covers the following topics:

- Oracle Interaction Center Overview
- Oracle Advanced Inbound Telephony
- Oracle Advanced Outbound Telephony
- Oracle Customer Interaction History
- Oracle Email Center
- Oracle Interaction Blending
- Oracle Interaction Center Intelligence
- Oracle One-to-One Fulfillment
- Oracle Scripting
- Oracle Universal Work Queue

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. Oracle Interaction Center supports the management and processing of customer relationship activity across all channels of customer contact.

Oracle Interaction Center integrates with several customer relationship business applications in the Oracle eBusiness Suite. This allows access to centralized customer information and business application functionality.

Oracle Interaction Center consists of several products. The modules relating to inbound telephony and outbound telephony are bundled separately. Oracle Interaction Center products include:

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Email Center, page 1-4
- Oracle Interaction Blending, page 1-4
- Oracle Interaction Center Intelligence, page 1-5

- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle Advanced Inbound Telephony

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

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

The Oracle Advanced Inbound Telephony bundle consists of the following products: Oracle Interaction Center Server Manager, Oracle Universal Work Queue, Oracle Telephony Manager, Oracle Interaction Center Intelligence and Oracle Interaction Blending. Oracle Interaction Center Server Manager is a set of shell scripts and batch files that start, stop and monitor the server processes in an interaction center server group.

Related Topics

- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Email Center, page 1-4
- Oracle Interaction Blending, page 1-4
- Oracle Interaction Center Intelligence, page 1-5
- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle Advanced Outbound Telephony

Oracle Advanced Outbound Telephony is another key part of the Oracle E-Business Suite of applications. It is the module of Oracle Interaction Center that addresses outbound telephony. Oracle Advanced Outbound Telephony 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

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

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

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Email Center, page 1-4
- Oracle Interaction Blending, page 1-4
- Oracle Interaction Center Intelligence, page 1-5
- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle Customer Interaction History

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

Applications record interactions through the Oracle Customer Interaction History framework itself, or through other applications that use Oracle Customer Interaction History. This information can be accessed by using the Oracle Customer Interaction History user interface, by using the user interface of an application that is integrated with Oracle Customer Interaction History, or by calling the Oracle Customer Interaction History APIs.

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Email Center, page 1-4
- Oracle Interaction Blending, page 1-4

- Oracle Interaction Center Intelligence, page 1-5
- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle Email Center

Oracle Email Center is a comprehensive solution for managing high volumes of inbound and outbound e-mails. Oracle Email Center reduces the cost per email interaction by automatically replying to certain email inquiries as well as routing others to a skilled set of agents and providing them with a full featured console with cross application functionality.

Oracle Email Center increases customer satisfaction and reduces customer attrition by providing quick, accurate and consistent responses. It also increases agent's efficiency through the use of a full featured, Email Center agent console thereby reducing agent turnover.

An easy-to-use graphical user interface called the Self Service Administration console enables the administrator to configure the system, define processing rules and publish business data, while the Supervisor console enables the supervisor to manage email queues and balance workload. In addition, Oracle Interaction Center Intelligence provides a comprehensive set of reports that enable directors and managers to track email activity and relate it to business events. Through its integration with other Oracle E-Business applications, Email Center provides its agents with cross-application functionality and at the same time provides a utility called Message Component to the business applications for viewing, composing and responding to email messages.

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Interaction Blending, page 1-4
- Oracle Interaction Center Intelligence, page 1-5
- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle Interaction Blending

Oracle Interaction Blending is a server in an interaction center server group that delivers media (inbound telephony, web callbacks, and outbound telephony) to agents through the Oracle Universal Work Queue work selector according to service levels set in a service plan.

Service levels define the goals for servicing contact channels. Service plans specify the desired level of service for a particular time of day. Service levels are assigned to time intervals in a service plan.

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Email Center, page 1-4
- Oracle Interaction Center Intelligence, page 1-5
- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle Interaction Center Intelligence

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

The data is presented to the user in a easy-to-use portal format. This format gives the user a unified, role-based, and easily customized view of Interaction Center information. Data presented includes session information, agent productivity metrics and key performance indicators (e.g., speed to answer and abandon rate).

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

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

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Email Center, page 1-4
- Oracle Interaction Blending, page 1-4
- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle One-to-One Fulfillment

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

Oracle One-to-One Fulfillment consists of an API, a server, an administration user interface called the Administration Console, and an agent interface used by Oracle Sales Online. The Oracle One-to-One Fulfillment API is used by the E-Business Suite applications to initiate a request for fulfillment processing. The fulfillment request identifies the agent or server, the content, and the channel. The Oracle One-to-One Fulfillment server processes the request. It compiles the personalized content and determines the recipients of e-mail, fax, print and physical collateral.

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

- Notification letters
- Dunning letters
- Lease terms
- Product information
- Survey e-mail invitations

Sales and marketing collateral

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Email Center, page 1-4
- Oracle Interaction Blending, page 1-4
- Oracle Interaction Center Intelligence, page 1-5
- Oracle Scripting, page 1-6
- Oracle Universal Work Queue, page 1-7

Oracle Scripting

Oracle Scripting provides enterprises with scripts which guide customers, agents and employees through decision flows based on a series of questions and answers. Scripts can be used for a variety of purposes: as traditional interaction center scripts that guide agents through collection of information and provide proactive alerts; as Web-based surveys for customers, prospects, and employees; and as self-service Web scripts that integrate with enterprise Web pages and provide a mechanism to guide Web customers through decision processes. Oracle Scripting is composed of several components: Script Author, the Scripting Engine, the Scripting Administration console, and the Survey Administration console.

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

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

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

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

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
- Oracle Email Center, page 1-4
- Oracle Interaction Blending, page 1-4
- Oracle Interaction Center Intelligence, page 1-5
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Oracle Universal Work Queue

Oracle Universal Work Queue provides one click access to work. It brings media queues, prioritized application work queues, work items and messages together in a single access point. Applications integrate with Oracle Universal Work Queue to enable customer channels and to centralize access to application work items. Customer channels deliver media (inbound telephone calls, outbound telephone calls, web callbacks, web collaboration requests and e-mail) to applications through Oracle Universal Work Queue. Applications generate work items (e.g., service requests, leads, opportunities, tasks) and distribute them through assignment, queues and work pools. Oracle Universal Work Queue provides the unifying link between media queues, prioritized application work queues, application work items and Oracle E-Business applications.

Related Topics

- Oracle Advanced Inbound Telephony, page 1-2
- Oracle Advanced Outbound Telephony, page 1-2
- Oracle Customer Interaction History, page 1-3
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- Oracle Interaction Center Intelligence, page 1-5
- Oracle One-to-One Fulfillment, page 1-6
- Oracle Scripting, page 1-6

Product Description

This chapter covers the following topics:

- New in This Release
- Features
- Architecture
- Responsibilities
- Concepts

New in This Release

The following functionality and components are new in this release:

New Cumulative Update 1 (CU1) Features

- Viewing All Queued Email, page 2-2
- Reprocessing Email Tags, page 2-2
- Showing or Hiding Buttons When Viewing Historical Email, page 2-2

New Agent Console Features

- Spelling Checker, page 2-3
- Annotations, page 2-4
- Record Document Usage, page 2-4
- Alternate Document Retrieval Process, page 2-4
- Agent Inbox Management, page 2-4
- Auto-Redirect, page 2-5
- Archiving and Purging, page 2-5

New Message Component Features

- Reroute, page 2-5
- Add Email Address for an Existing Customer, page 2-5
- Templates on the Reply Page, page 2-5
- Default Service Request Status Template, page 2-6

New Self Service Administration Console Features

- Profile Options, page 2-6

Viewing All Queued Email

The Supervisor Console was introduced in Oracle Email Center release 11.5.8. However, as part of the Queue Management capability, supervisors could only view the first 500 or the oldest 500 email in a specified queue. This cap was implemented after testing indicated that the performance for displaying queued email deteriorated as the number of email increased. For most customers, an email cap of 500 was more than sufficient because either the customers' business never had a backlog of 500 email at any given time or the customers distributed the email so that no single queue accumulated 500 email at any given time. However some customers who do not categorize email into separate queues, and potentially could have a backlog of more than 500 email, want their supervisors to view all email in a specified queue.

This new feature allows users of the Oracle Email Center Supervisor Console to view all email in a specified queue.

Reprocessing Email Tags

Oracle Email Center tags every outbound email with a list of key value pairs containing system and custom data. When a customer replies to the email this tag helps to identify the reply as a response to the email sent out by the Email Center agent. When the customer replies to the email, the Oracle Email Center processing engine extracts the tag and uses the data to:

- Thread Interactions (Interaction ID)
- Identify Customer/Contact (Customer and Contact ID)
- Reroute Email to the same agent (Agent ID)
- Automatically Update Service Request (SR Number)

However, in previous releases, each unique tag was only processed once and was then invalidated. If a customer replied back to the same outbound email more than once, the second email reply would be treated as a new issue. The second reply would not be threaded to the earlier interaction and would not have the same processing rules applied to it.

This new feature allows the Email Center processing engine to reprocess the same tag multiple times. Thus, if a customer replies back to the same email more than once, each of those responses will be threaded to the same parent interaction and the same processing rules will be applied. Also, if the tag contains a SR number then the corresponding service request will be associated with every email response received from the customer.

This feature is controlled by a new profile option, IEM: PROCESSING: REPROCESS ALL TAGS. You can set this profile option in Forms by using the System Administrator responsibility. If the value for this profile option is set to **Yes**, then tags can be reused. The default setting for this profile option is **No**, thus preventing tag reuse.

Showing or Hiding Buttons When Viewing Historical Email

When viewing historical email messages, Oracle Email Center agents have the ability to resend outbound messages, forward messages, and reply to inbound messages that had been resolved earlier. In this release, Oracle Email Center provides the ability to

hide the Resend, Forward, and Reply buttons from agents who are viewing historical email messages in the Message Component. By hiding these buttons, the agents cannot resend, forward, or reply to these messages. The following profile options hide the respective buttons (you can set these profile options in Forms by using the System Administrator responsibility):

- IEM: Message Component: Hide History Resend
- IEM: Message Component: Hide History Forward
- IEM: Message Component: Hide History Reply

By default, the above profile options are set to **No** so that they do not impact 11i10 customer who apply the CU1 patch. To hide a button from the Message Component, the corresponding profile option should be set to **Yes**.

Spelling Checker

The spelling checker engine will enable agents to spell check the response or a new email composed prior to sending it. The spelling checker engine will also enable administrators and supervisors to check for spelling errors while creating a document/template using the editor provided within Oracle Email Center.

Dictionaries for the following languages will be available in this release:

- American English
- Brazilian Portuguese
- British English
- Canadian English
- Danish
- Dutch
- English
- Finnish
- French
- German
- Italian
- Norwegian
- Portuguese
- Spanish
- Swedish

Additionally, a site level custom dictionary is provided, for the administrator to add words that are specific to the company/business such as company name, address, product names, common acronyms etc.

The spell checking UI will enable users to replace a single or all occurrences of an incorrectly spelled word with the correct match from the dictionary or as manually typed by the user. The user will also be able to ignore spelling errors identified by the spelling checker engine if he/she desires.

Annotations

Annotations will provide Email Center agents with the ability to enter and review internal notes for any given email message. A note is related to a unique email message. This will enable Email Center users to communicate with each other in regards to a specific incoming email and also record a justification or explanation of their actions. This note can be viewed by all users who wish to review the details pertaining to the email interaction at a later time.

Record Document Usage

The use of every document inserted or attached to an email message will be recorded. The data thus gathered will be used to sort the probable response documents suggested to the user while responding to an incoming email. Hence the document usage count can also be viewed as a measure of the document's popularity. Email Center will also record if the document was suggested to the agent as a probable response or did the agent manually select it or if it was used to automatically respond to the email. Such counts in relation to the email account, classification etc. will provide an alternate way to sort the suggested responses presented to the agent.

Alternate Document Retrieval Process

Suggesting a list of probable responses enables contact center agents to respond to high volumes of inbound email as quickly as possible in an accurate and consistent manner. Currently, the probable response documents for a given inbound email are fetched based matching of keywords extracted from email with keywords stored in the Email Center schema for each pre-defined intent and the keywords corresponding to every document in the knowledge base repository. This method is dependent on Oracle Text extracting the correct keywords; accuracy of the Email Center's Intent engine and the current state of the index of keywords that match documents stored in the knowledge base repositories.

Release 11i10 introduces a simplified mechanism for presenting probable response documents to an agent. This method is based on a direct mapping of a MES category to a specific rule set.

Agent Inbox Management

From release 11i10 onwards, the Supervisor will be able to monitor the inboxes of individual agents. This will enable them to view unresolved emails sitting in agent's inbox and take any of the following action:

- Reply to them
- Requeue them
- Transfer them another agent
- Delete them

This will help Supervisors manage emails currently assigned to agents who are either on vacation or are no longer employed with the company.

Auto-Redirect

A new rule type will be added to the email processing engine for automatically redirecting incoming emails to a different Email Center account or to an external email address. This functionality will provide the following benefits:

- Ability to redirect emails from one central external account (email address known to customers) to multiple internal accounts (setup for dividing work internally)
- Ability to transfer emails from an old de-activated email account to a new email account
- Ability to transfer emails to non-Email Center agents
- Ability to redirect emails to an agent's personal email account which he/she can check without being connected to the network

Archiving and Purging

Every incoming and outgoing email is stored in one of the system folders in Email Center as detailed below:

- Resolved - Stores the incoming emails that have been responded to
- Deleted - Stores the incoming emails that were deleted by agents
- Sent - Stores a copy of every outbound email

Agents can view these stored emails either by performing a message search or via Oracle Customer Interaction History. However as the size of the system folders increases, the performance of the message search process deteriorates. Hence, Email Center will be providing the functionality that will enable the administrator to periodically archive or purge these system folders. While archive will create a separate system folder and move email messages that match the criteria to it, purge will permanently delete the email messages the match the criteria.

Reroute

The Reroute capability introduced in the previous release is further enhanced to enable agents to reroute emails to a different email account. The rerouted email will be reprocessed based on the processing rules associated with the new email account.

Add Email Address for an Existing Customer

If the senders email address does not match any record in the customer database, then the agent will be enabled to manually search for the customer record using other criteria such as company name, first name, last name and then add the sender's email address to it in a single click. The agent can also mark this new email address as the primary one so that it is selected by default when a new email is being composed for that customer.

Templates on the Reply Page

Previously the shortcut to the MES category that contains the templates or style sheets was only displayed while composing new emails. From release 11i10 onwards the shortcut to the templates category will be displayed in the Reply page as well.

Default Service Request Status Template

The administrator will be able to select a pre-defined template as the default for service request status related inquiries. This will enable the agent to insert or attach the template with a single click (rather than browse through multiple levels of MES categories) after creating or updating a Service Request from within the Email Center Message Component.

Profile Options

The following new profile options are introduced to support the new functionality introduced in release 11i10

- **Default Spell Checking Dictionary** - The dictionary file for the language selected will be used by default while spell checking an email or document. The agent will be provided with an option to manually override the default while spell checking an individual email or document.
- **Spell Check Messages before sending** - If set to "Yes", the agent will be forced to spell check the email prior to sending it to the customer. If set to "No" then spell checking will be performed only when requested by the agent.
- **Default SR Status Template** - The administrator can select a pre-defined template to be used by default when responding to service request status related inquiries. This is not a mandatory profile option and can be left NULL. In which case the agent would have to manually select the template by browsing through MES categories.
- **Reply to All** - This profile option provides the ability to reply to all recipients copied on the incoming email. If an incoming email contains multiple email addresses in the "To" and "Cc" fields, then each of those addresses are automatically applied (copied) to the outbound response as well. From the list, select **Yes** or **No**.
- **Include Incoming Attachments when Replying** - If you set this profile option to **Yes**, then the original attachments will automatically be attached to the reply being composed and the titles of the attachments will be displayed in the "Attachments" section. From the list, select **Yes** or **No**.
- **IEM: Message Component: Use full headers in reply** - This is a profile option set in forms that controls the header information attached to email replies. From the list, select **Yes** or **No**. A setting of **Yes** will include From, Sent, To, and Subject information directly below the ---- Original Message ---- text in the body of the email.

Features

Oracle Email Center is a complete solution for managing email interactions with customers, partners, suppliers, employees and other entities that interact with an organization. Oracle Email Center can automatically analyze the intent of an incoming email in any of the multiple supported languages and suggest probable response documents to the agents based on the intent of the incoming email. A sophisticated Classification and Routing engine helps to automatically categorize the email based on rules defined by an administrator and route emails to a specific user group based on agent skills and email content. Using a centralized customer model and Oracle Customer Interaction History schema, Oracle Email Center records all email interactions and maintains a link to the archived emails as well. To better develop email into a strategic business channel, Oracle Email Center is seamlessly integrated with the other Oracle E-Business Suite applications. This integration enables the Email Center agent to create

and update business objects such as service requests. Oracle Email Center also provides a utility called the 'Message Component' that provides agents in other applications with a unified approach to composing emails and viewing archived emails.

Oracle Email Center maximizes value for enterprises by automating incoming email interactions through classification, routing, queuing, response selection, and delivery of email messages to the appropriate group of agents. The enhanced processing engine now enables administrators to define rules using customizable data whose value changes dynamically. Based on these customizable business rules, incoming messages are automatically acknowledged, classified or categorized and routed to the appropriate contact center agents. The ability to insert tags into outbound emails and extract these tags from inbound response emails also enables Oracle Email Center to perform certain processing actions automatically. Oracle Email Center exploits the centralized customer information provided by Oracle's single customer model and leverages leading Oracle technologies and products such as Oracle eMail Server and Oracle Text (linguistics processing engine) to deliver a robust, functionality-rich solution.

A key strategy for customer acquisition and retention lies in deploying an email response management system as part of an integrated multi-channel customer contact strategy that is integrated with the enterprise's service applications. Along with Oracle Advanced Inbound and Advanced Outbound for telephony and web customer contact, Oracle Email Center provides contact centers with an easy-to-implement, enterprise-class email response management system pre-integrated with other interaction center channels and Oracle E-Business Suite applications.

Related Topics:

- [Architecture, page 2-7](#)
- [Responsibilities, page 2-15](#)
- [Concepts, page 2-17](#)

Architecture

This topic group contains the following topics:

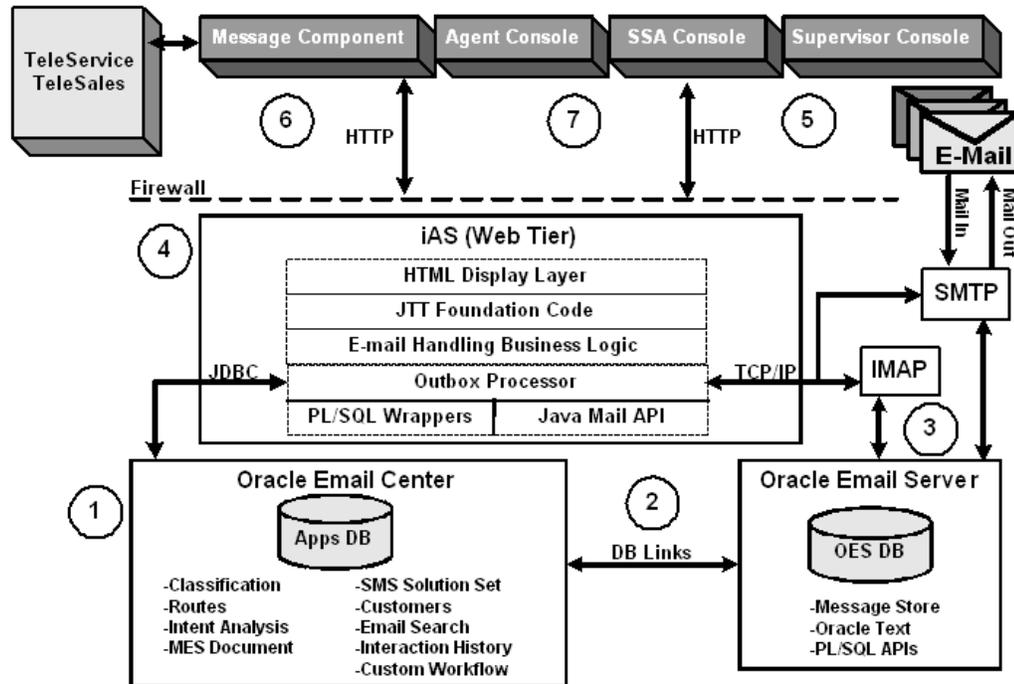
[Email Center Architecture Diagram, page 2-7](#)

[Oracle Email Center Components, page 2-10](#)

[Email Processing, page 2-11](#)

Email Center Architecture Diagram

The following diagram describes the architecture of Oracle Email Center.



1. Oracle Applications database:

This database contains all Oracle Applications schema & API's including:

- The Email Center schema and server-processing programs
- Customer Interaction History schema
- Marketing Encyclopedia System (MES) schema and programs
- Knowledge Management (KM) schema

2. Oracle eMail Server database:

Oracle eMail Server (OES) provides the core email system used by Email Center. OES has PL/SQL, IMAP and SMTP interfaces. The OES PL/SQL APIs extend the email functionality to implement rule based notifications, account maintenance, and Oracle Text processing. The Message Store resides in an Oracle database, and is a collection of database tables and stored procedures that implements the various email specific operations. Oracle Text provides search, retrieval, and viewing capabilities for text. Email Center uses Oracle Text to retrieve keywords from inbound messages.

3. Oracle eMail Server Middle-tier processes:

Postman, IMAP, SMTP, IOLISTENER are some of the OES processes that are part of the middle-tier. Oracle eMail Server uses Simple Mail Transfer Protocol (SMTP) for receiving and sending email and the Email Center Agent Console and Message Component uses Internet Message Access Protocol (IMAP) to access emails stored in the Message Store.

4. Oracle internet Application Server (iAS) or Web Tier:

This constitutes the middle-tier business logic and is used for all HTTP requests from the Email Center components such as the Email Center Self Service Administration Console, Agent Console and Message Component.

The Email Center middle-tier resides on iAS. In addition to providing the interfaces for the various Email Center components, the middle-tier also manages load and connections to the various IMAP and SMTP servers. Caching of commonly used objects like connections to email accounts, profile values, and server information is used for improved performance and scalability. The Java Mail API (JMA) is used to communicate from the Java mid-tier layer to OES.

This tier also includes the outbox processor. The Outbox Processor is essentially a queue for outbound emails. When an agent clicks **Send**, the outbound message is queued and processed asynchronously. The Outbox Processor will record the interaction in Oracle Customer Interaction History and archive a copy of the outbound email prior to sending the email.

5. **Oracle Email Center Self Service Administration (SSA) Console:**

This console is used for creating and maintaining the Email Center configuration and business rules for email processing. These setup pages also include a simple Default Configuration page for customers implementing the product for the first time. This set of screens enable the administrator to configure Email Center, create email accounts, configure email processing rules update Intents, assign agents to email accounts and publish response documents into the Marketing Encyclopedia System (MES).

6. **Oracle Email Center Message Component**

The Message Component (MC) contains all functionality needed to compose, reply, or view email messages from Email Center. The MC is a standalone browser window that is launched from the Agent Console whenever a message needs to be viewed. Once the agent is finished with the message, the MC browser window closes.

The Message Component is also used by other integrated applications to allow them to view historical email messages that are stored in the OES Message Store and to compose new outbound messages.

The Message Component contains Knowledge Base functionality that allows agents to insert or attach documents. Customer searching and detail information allows agents to associate messages with customers.

7. **Oracle Email Center Agent Console:**

The Agent Console (AC) contains the Home page for an Email Center agent. This gives the agent a view on what email messages are waiting in queue for handling as well as what messages are currently assigned to the agent. From the Home page, an agent can request a new message from a classification queue, drill down to the Inbox to see what messages are still waiting to be answered, or compose a new outbound message. The Home page also gives agents the ability to take a break and to see what Email Center activities they've accomplished.

The AC also provides a view to the agent's Inbox for each account to which the agent is assigned. The My Inbox page lists Sender, Subject, Date, and Status information for each message in the Inbox, and a click on the Subject will launch that message into its own Message Component window.

Customer functionality includes the ability to search for customers, to identify persons, organizations, or relationships to compose outbound email messages to, plus see what interactions agents have already had with the customer. In the Interactions view, agents can click on old messages and view them.

The calendar tab also exposes the Oracle Applications Foundation calendar functionality.

If you have the Email Center Supervisor responsibility, you will also see the Supervisor tab displayed in the Email Center Agent Console. The supervisor tab allows you to preview, assign, reply to, or delete queued messages; assign agents to accounts or accounts to agents; and create, update, and publish documents.

Related Topics:

- Oracle Email Center Components, page 2-10
- Email Processing, page 2-11

Oracle Email Center Components

Oracle eMail Server (OES)

This is the mail server that receives and sends the emails for Email Center.

Email Center Message Component

The Message Component provides all email message functionality, including viewing and composing. Inbound messages are displayed and can be replied to using system-generated suggested responses. Outbound messages can be created using a rich-text (HTML) or plain text editor that allows inserting standard templates and free form text.

Email Center Agent Console

The Email Center Agent Console is an HTML application that allows Email Center agents to view inbound message volume, request new messages, see assigned messages, and compose new messages. The composition and viewing of messages is handled by the Message Component which works in tandem with the Agent Console and allows the agent to work or view multiple email messages at the same time.

Email Center Supervisor Console

The supervisor console is a tab in the Email Center Agent Console that appears when you log in with the Email Center Supervisor responsibility. This tab allows you to preview, assign, reply to, or delete queued messages; assign agents to accounts or accounts to agents; and create, update, and publish documents.

eMail Self Service Administration Console

The Self Service Administration (SSA) console provides unified setup pages to guide an administrator through the implementation, configuration and administration process of Oracle Email Center.

Email Center Server Process

The Email Center Server Process is a PL/SQL based program that extracts information from an email message to perform the intent, classification, routing processes, and deliver the email to the appropriate group of agents.

Oracle Application Foundation Modules

Email Center uses several features of the Oracle E-Business Suite products, such as the Resource Manager and Oracle Customer Interaction History (IH).

Related Topics:

- Email Center Architecture Diagram, page 2-7
- Email Processing, page 2-11

Email Processing

Inbound Email Processing

1. Inbound email arrives at the Oracle Email Server (OES) to an email account that is monitored by Oracle Email Center.
2. Postman process fires server-side rule to launch pre-processing of the new email.
3. Pre-processing collects header-data of the email and performs intent-analysis using keywords extracted from the inbound email.
4. Performs customer-search based on the 'From' header of the inbound email and pre-processed data is stored in the schema.
5. Oracle Email Center concurrent program starts processing the pre-processed emails.
6. Extracts Tag data using the encrypted tag in the subject of the email, if there is one.
7. Executes custom workflow, if enabled, for the email account.
8. Invokes auto-processing rules engine which evaluates the email processing flow based on rules and executes corresponding actions.
9. The email is made available to the agent to respond.
10. Agent responds to the email and requests next email.

Outbound Email Processing

Outbox Processing (OP) is the term used to describe what happens to messages related to an interaction when an Email Center agent performs a final action on such messages. These actions include Send, Delete, Transfer, or Reroute.

In earlier versions of the product, outbox processing was handled at the agent level in a synchronous fashion. For example, when an agent sent a reply message, the following actions took place:

1. An Email Center Tag was appended to the subject of the message.
2. The outbound message was sent.
3. A copy of the outbound message was put into the Master account Sent folder.
4. The inbound message was moved to the Master account Resolved folder.
5. Customer Interaction History was recorded.
6. UWQ Session History was recorded.

Because this happened synchronously, we were able to alert the agent to failure at any point in the process. The code also handled retrying the failed action and continuing once the problem was resolved. While this was good feedback for the agent that the message was successfully sent, if a failure occurred, there was nothing the agent could do other than to inform the administrator.

In release 11.5.9 onwards, the outbox processing is moved from a synchronous agent-monitored activity to an automated system-monitored function. This

change results in benefits for the agent because sending a message, deleting a message, transferring a message or rerouting a message no longer has to be monitored by the agent. Instead, when an agent performs one of these terminating actions, a record is queued up in the "Outbox" and the messages are processed automatically by the system. This asynchronous processing increases agent productivity because the agent no longer has to wait for the backend process to complete. This will remove the extra wait time currently incurred by the agent after clicking the Send button, for instance.

Also, by automating this process, and due to the fact that all of the information needed to process a message is already stored in the database, we will be able to provide PL/SQL and Java APIs that will allow other teams to insert messages into our Outbox. This will enable applications including Oracle Email Center to generate outbound emails without agent intervention, which is can be used for auto replies, auto acknowledgments and email notifications.

MAIL Notify

1. An incoming email is received from the Oracle eMail Server (OES) SMTP process.
2. The Postman delivers it to the Account Inbox.
3. Postman fires the OES server side rule.
4. The Mail Pre-processing is launched.

MAIL Pre-Processing

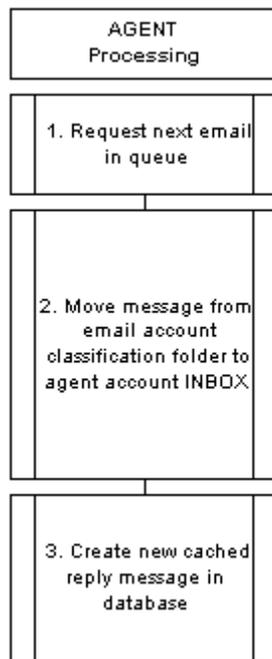
1. As part of pre-processing, the information from the email header and extended headers is retrieved and stored as email meta-data.
2. The email account is authenticated.
3. If the email account to which the email has arrived is intent-enabled, the data from the incoming email (along with the header and attachment data) is then analyzed using Oracle Text, and a set of keywords are extracted from the email.
4. These keywords are used by the intent engine to analyze the email for intent.
5. The Header and Extended Header information is extracted from the email and added to the email meta-data.
6. The email is mapped to a valid customer ID using the 'From' header of the inbound email.
7. The information collected as email meta-data is then stored in the Pre Meta Data Table (MDT).

MAIL Processing

1. Oracle Email Center concurrent program processes each email token from the Pre Meta Data Table as part of email processing.
2. Extracts Tag data using the encrypted tag in the subject of the email, if there is one.
3. If the Customized Processing Flow flag is set for the email account that the email was sent to, the custom workflow is run.
4. Invokes auto-processing rules engine where the following rule-types are evaluated:
 - Classify email based on rules.
 - Auto-delete an email based on rules.

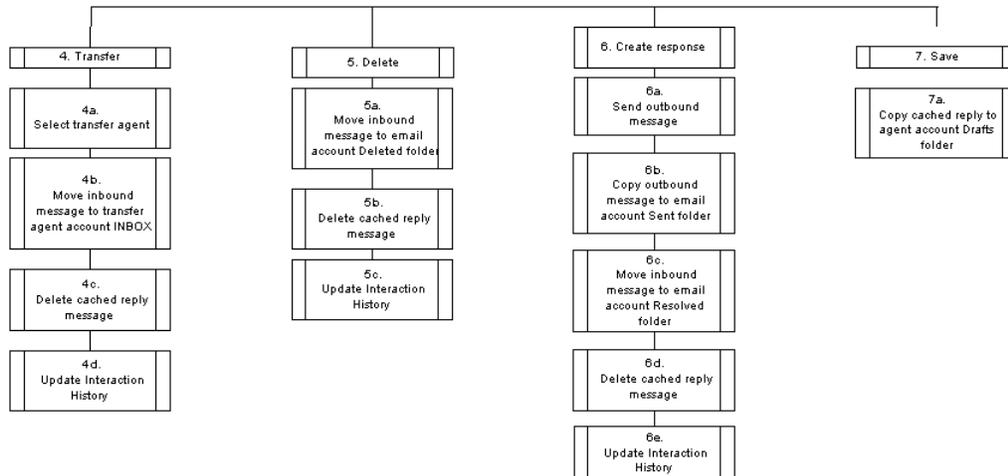
- Auto-acknowledge with specific template based on rules.
 - Auto-process email based on rules and execute a custom procedure or update a business object.
 - Auto-Reply to the email with specific documents based on rules.
 - Route email to a destination group of agents based on rules.
5. The appropriate Customer Interaction History media items and media life cycle segment (MLCS) records are created/updated to reflect processing actions.
 6. The knowledge base repository is searched for related response documents.
 7. The email meta-data is stored in the Post MDT table thereby making the email available to agent for processing.

AGENT Processing



When Oracle Email Center agents log in, they are presented with the Home page.

1. From this page, the agent can either select an account and a classification to get a queued email or select an account and begin working on a previously fetched email.
2. When a queued email is selected, a new Message Component browser window is launched, and the message is displayed as a ready to edit Reply. Internally, the email message is moved from the email account classification folder to the agent account inbox.
3. At the same time, a cached reply email message is created in the database.



4. If the agent cannot answer the customer question it can be transferred to a manager or other subject matter expert using the Transfer button.
5. If the agent feels that no response is necessary, the inbound message can be deleted.

Note: When an agent clicks the Delete button the message is not actually deleted but moved from the agent's inbox to the email account's Deleted folder where a supervisor or administrator can review deleted messages prior to purging them.

6. In the reply page the agent can create a personalized response to the customer inquiry using the following features:
 - insert or attach suggested responses generated by the backend processing,
 - attach other collateral documents either from the local machine or the network,
 - browse the MES knowledge base and add those documents,
 - search the MES or Knowledge Management knowledge bases for other information,
 - add free form text.

An attempt is made to identify the customer and contact for the email message. If the inbound message is a reply to a previously sent Email Center generated message, the tag processing is used to look up the customer and contact. If that fails, the TCA schema is searched for a matching email address. If an exact match is found, the reply page displays the customer information. If multiple matches are found, the agent can click a link to get a list of customers with matching email addresses. If the backend processing is unable to identify a customer, the agent can search the customer database to attempt to find the customer. This enables more accurate Customer Interaction History to be recorded.

7. Finally, if the agent is unable to complete the reply, the message can be saved using the Save button.

If the Save button is selected, all information pertaining to the reply is stored on the mail server and the next time the Inbound message is selected out of the agent's inbox, the saved draft message will be restored and presented to the user.

When the agent is finished with the message, whether Transferring, Sending, Deleting, Saving, or Canceling, the Message Component window is automatically closed. In the case of a "terminal" action for the message interaction with the agent (Transfer, Send, or Delete), Customer Interaction History is recorded such that in the future this agent or other agents can see the previous correspondence the company has had with the customer.

Related Topics:

- Email Center Architecture Diagram, page 2-7
- Oracle Email Center Components, page 2-10

Responsibilities

Email Center utilizes the following responsibilities:

Responsibility Name	Who Uses it	Responsibility Description
Email Center Self Service Setup	Email Center Administrators	<p>Allows access to the Email Center Self-Service Administration Console. This console is used to:</p> <ul style="list-style-type: none"> • Setup and configure email/database servers and database links • Create plain text or HTML Auto-Acknowledgement templates. • Create email accounts and associate agents to them. • Define email processing rules and associate them with email accounts. • Define customer tags and associate them with email accounts. • Create templates/ documents and publish them in MES. • Create and maintain resource (agent) groups.
Interaction History JSP Admin	Email Center Administrators	<p>Allows access to Oracle Interaction History, where administrators can create custom reason codes and associate them with Email Center actions.</p>

Responsibility Name	Who Uses it	Responsibility Description
Email Center Agent Console	Email Center Agents	<p>This responsibility, along with the Email Center Message Component responsibility, must be assigned to all Email Center Agents.</p> <p>Allows access to the Email Center Agent Console. This console is used to:</p> <ul style="list-style-type: none"> • Acquire inbound email from Message Queues. • Open Emails from Inbox. • Launch Message component for composing emails.
Email Center Message Component	Oracle Email Center Agents Oracle TeleService Agents Oracle TeleSales Agents	<p>Allows access to the Email Center Message Component.</p> <p>Allows Email Center agents to:</p> <ul style="list-style-type: none"> • View and respond to incoming emails. • View and either resend or respond to archived emails. • Compose new outbound emails.
Email Center Supervisor	Email Center Supervisors	<p>Allows access to the Supervisor console. This tab allows you to:</p> <ul style="list-style-type: none"> • Monitor inbound email queues. • Preview, assign, reply to, or delete and message in the queue. • Balance workload by assigning agents to accounts and vice-versa. • Create, update, and publish documents into MES.
Email Center Concurrent Program Administrator	Email Center Administrators	<p>Allow access to the Concurrent Program submission form.</p> <p>This responsibility enables you to submit and monitor Email Center related concurrent programs.</p>

Concepts

Topics include:

- Auto-Delete, page 2-17
- Auto-Redirect, page 2-18
- Auto-Reply, page 2-18
- Auto-Route to Agent, page 2-18
- Auto-Update Service Request, page 2-18
- Default Customer, page 2-19
- Document Retrieval, page 2-19
- Email Classifications, page 2-19
- Email Folders, page 2-20
- Execute Custom Procedure/Workflow, page 2-20
- IMAP Server, page 2-21
- Intent Processing, page 2-21
- Interaction Threading, page 2-21
- Knowledge Base Repositories, page 2-21
- Merge Fields, page 2-22
- Notes, page 2-27
- Oracle Text, page 2-28
- Oracle Text Processing, page 2-29
- Probable Response Document Retrieval, page 2-29
- Service Requests, page 2-30
- SMTP Server, page 2-31
- Spell Checker, page 2-31
- Tags, page 2-32
- Using Email Center Editors, page 2-33
- Wrap Up Reason, page 2-33

Auto-Delete

Oracle Email Center now provides administrators with the ability to define rules for automatically deleting an inbound email. If the conditions defined by the administrator are satisfied, then the incoming email will be automatically moved to the "Delete" system folder for that account. An interaction for the same will be recorded and the email will not be processed any further.

Auto-Redirect

Auto-Redirect refers to the ability to redirect an incoming email to a different Email Center account or to an external email address based on defined rules. This functionality will provide the following benefits:

- The ability to redirect emails from one central external (email address known to customers) account to multiple internal accounts (setup for dividing work internally).
- The ability to transfer emails from an old de-activated email account to a new email account.
- The ability to transfer emails to non-Email Center agents.
- The ability to redirect emails to an agent's non-Email Center account which he/she can check without being connected to the network.

Oracle Email Center provides administrators with the ability to define rules for automatically redirecting an email message. In addition to the auto-redirect rules, custom tags are extracted from incoming emails and made available as keys for the defining rules. Activities and media life cycle segments are recorded to indicate that an incoming email was automatically redirected.

Auto-Reply

Oracle Email Center provides administrators with the ability to define rules for automatically replying to an inbound email. If the conditions defined by the administrator are satisfied, then an outbound response is formed using the templates/documents selected by the administrator and sent to the customer automatically using the Outbox Processor. The incoming email will be automatically moved to the "Resolved" system folder and a copy of the response will be archived in the "Sent" system folder for that account. An interaction for the same will be recorded and the email will not be processed any further.

Auto-Route to Agent

Oracle Email Center's email processing engine allows you to set routing rules so that subsequent email correspondence with a customer will automatically be routed back to the original agent (the agent who handled the customer's original email).

Oracle Email Center tags every outbound message with the ID of the agent who sends it. To route a customer's response back to the agent who originally sent the email, when associating a "Routing" type rule to an email account, select "Original Agent" from the Primary Destination list. If the email processing engine identifies the presence of an "Agent ID" system tag in the inbound email, then it routes the email to that agent, otherwise the email will be routed to the resource (agent) group selected as the "Default Destination" for that routing rule.

Auto-Update Service Requests

Email Center agents can create a service request from the Email Center Message Component. The Service Request is associated with the incoming email and the SR number is tagged to the outbound response. Administrators can define rules for automatically updating a service request and the status code to be used. If the incoming email satisfies the conditions and if an SR number tag is extracted, then the corresponding service request will be updated to the status code selected by the administrator.

Default Customer

As Oracle Email Center processes inbound and outbound email message, Email Center uses customer IDs to record information about the messages processed. As Email Center is set up for use by your business, a default Customer ID must be defined for use by Oracle Email Center. The default Customer ID must be a customer identification number which you want to use in processing inbound and outbound email for which a customer match could not be identified. Depending on your business processes, this could be a customer ID that represents one of your current business customers or a customer that you have created specifically to be used as a default customer, such as “Unidentified Customer”. The default customer ID is used by Email Center for every interaction for which a customer match could not be found.

Document Retrieval Rules

The document retrieval method used to be based only on matching keywords extracted from the incoming email to the keywords in documents stored in the Knowledge Base repositories. Oracle Email Center has now added an alternate means of retrieving MES documents. This new method is based on a mapping of the incoming email to a specific category in Marketing Encyclopedia System (MES).

Different categories can be selected for different conditions defined using the rules engine. Documents in the category selected are displayed in the descending order of their usage.

The Document Retrieval processing rule enables administrators to select a method for retrieving documents from the Knowledge Base. They can choose to use the old keyword matching method, or the new MES Category Mapping method.

If “Keyword Matching” method is selected, then the administrator can select:

- Either Knowledge Management or MES repository or both.
- Select categories within MES in which to scan for documents with matching keywords.

If “MES Category Mapping” method is selected then the administrator can select one specific category to be mapped to the rule conditions.

Email Classifications

Classifications are user-defined categories or queues in which email messages are placed depending on their properties and content. When you set up your Email Center system, queues are created for each of the classifications you define in your system. As email is received and categorized into an Email Center classification, the email message is placed in the queue for that classification. When an agent logs into the Email Center Agent Console, a list of email accounts, to which the agent has been given access, is displayed along with a list of the classification queues and the number of email messages in each of the queues. If a queue does not contain any email messages, the queue will not be displayed to the agent.

Email Center uses Email Center classifications to categorize inbound email so that it can be automatically routed to specific groups of agents. The Email Center Self Service Administration functionality provides classification administration pages which enable the creation of classifications using classification rules. Email Center classification rules use classification keys and for each type of key a set of valid operators are available. Classification keys represent inbound email characteristics such as message

size or received date. Multiple classification rules can be chained together using And or Or operations to create a classification. The classifications are associated with specific email accounts and are given a processing priority within their associated email account.

Classifications can be used when defining routing rules. The Email Center Self Service Administration functionality enables you to classify your inbound email so that the email messages can be routed to specific groups of agents.

You use email classifications to differentiate email, such as email received from particular customers that should be routed to specific agents based on service levels. For example, you can classify your premier customers as Gold customers and classify other customers as Silver customers. You can then set up routing rules to route email messages from your Gold customers quickly to specific agents, so that Gold customers receive a greater level of service than Silver customers.

Email Folders

As you process email messages using Email Center, copies of the messages you receive, send, and delete are stored in the appropriate email folders. You can access the email folders, associated with the email accounts to which you are assigned to work, to perform searches for messages. Agent Inbox folders are used to store all incoming messages, that they have fetched from the Messages Queue and have not yet processed. Each Email Center agent has an Inbox email folder for each email account they are assigned to work.

For example, Agent A is assigned to work the `banking@mycompany.com` and the `insurance@mycompany.com` email accounts. Agent A has the following two (2) email folders which he/she can access for message searches:

- Inbox folder associated with the `banking@mycompany.com` account
- Inbox folder associated with the `insurance@mycompany.com` account

In addition to your inbox folder, you can access the following email folders for message searches. These folders are associated with the email accounts to which you are assigned to work.

- Deleted: Folder used to store all incoming messages for a particular account that were deleted.
- Resolved: Folder used to store all incoming messages for a particular account after you have responded to them and completed the send operation.
- Sent: Folder used to store a copy of every outgoing message composed for that particular account.

Execute Custom Procedure/Workflow

Oracle Email Center implementations are now enabled to execute a custom procedure or workflow as part of the email processing. All the data values extracted from the header of the incoming email including the tags are available as input parameters for the custom procedure/workflow. The custom procedure/workflow MUST return either "Y" or "N" as the output parameter. If the output of the customer procedure/workflow is "N", then the inbound email is not processed any further, or else the email is processed by executing other processing rules in the order of their priority.

IMAP Server

IMAP is an acronym for "Internet Message Access Protocol" that regulates the communication between email clients and the messages stored in the Email Server.

The IMAP server is a set of processes that provide email clients with the ability to access and manage messages stored in the Email Server based on the above protocol.

Intent Processing

Intent Analysis refers to the process that Oracle Email Center employs to identify the intent of the incoming email message or the broad area pertaining to the email. This process is primarily dependent on extracting keywords from the incoming email message. This is accomplished using the Oracle Text engine which is one of the core components of the Oracle Database. Oracle Text additionally has the option to derive related "themes" based on the "tokens" extracted from the incoming email message. For English language both theme and token processing is allowed. For all other language Oracle Text only uses only tokens.

These keywords (tokens or themes) are then matched against a set of keywords that were generated and stored in the Email Center schema as part of the configuration step of setting up "Intents". Based on this match, Email Center processing engine identifies one or more "Intents" related to the incoming email message.

For example, a hardware company would have the following intents: Accessories, Service, Product Information, Installation whereas a medical company will have very different intents, e.g. claims, insurance, and doctors.

Interaction Threading

An email interaction thread is formed when an incoming email is linked to its predecessor. The interaction ID is tagged to every outbound email. When the customer replies back, the interaction ID tag is extracted from the incoming email and used to link it to the new email interaction thereby forming a thread. All interactions linked in a common thread can be viewed in the Customer Interaction History screen for that customer.

Knowledge Base Repositories

As you work with email messages, you can use suggested response documents and email templates which have been stored in the knowledge base repositories set up for use by Email Center.

As you work with the Oracle Email Center application and refer to the Knowledge Base (KB) for Email Center, you are referring to the set of products that you are using to store documents used with email processing. The Email Center Knowledge Base can be just the Marketing Encyclopedia System (MES), or both MES and Oracle Knowledge Management. Oracle Knowledge Management, formerly named the Solution Management System (SMS), is a component which enables Oracle support applications to manage solution sets. Solution sets typically associate problems with their respective fixes. SMS serves as a repository of problem, diagnosis, related symptoms and their solutions. SMS is currently optional for Email Center but MES is required for use for Email Center.

As Oracle Email Center was set up for use by your business, the following two types of documents were uploaded into MES for you to use in composing or responding to email messages:

- Suggested response documents: Documents which are presented to the agent as suggestions for responses to incoming email.
- Message format templates: Documents which are predefined style sheets for Email Center agents to use when composing email messages.

As your Email Center system was set up, categories were created in MES in which to organize and store the Email Center related documents. Message format templates were created and then stored in the Email Center Templates category of MES. Message format templates must be stored directly under the Email Center Templates category in order for agents to access the templates. However, suggested response documents can be stored in any MES categories. Thus, suggested response documents were created and stored in the appropriate MES categories.

For organizational purposes, your Email Center administrator might have chosen to create an Email Center category in MES in which to store all of the Email Center related documents. If this has been done, the Email Center Templates category might have been created under the Email Center category, as a subcategory of Email Center.

Merge Fields

Merge fields are dynamic content that are inserted into documents and templates with the aim of personalizing the content. The merge field is a placeholder for a variable that gets filled automatically by the application or when a query associated with a document is fired.

The use of merge fields in a document enables its content to be dynamic. Email Center recognizes dynamic merge fields only in HTML or text file type documents. You can create highly personalized response documents through the use of merge fields. To include merge fields in a document, they must be enclosed within a special set of tags.

- For a required merge field: ((* *))
- For an optional merge field: ((? ?))

In the following example:

- Dear ((*CP_TITLE*)) ((?CP_FIRST_NAME?)) ((*CP_LAST_NAME*))

At the time agent selects document either for inserting or attaching into outbound email, values for merge fields CP_TITLE and CP_LAST_NAME will be required, whereas a value for CP_FIRST_NAME will be optional.

Email Center supports three types of merge fields:

1. Standard Merge Fields - These are pre-defined in Email Center. Standard merge fields are automatically populated with customer, email account and message information. These merge fields can be inserted directly into a response document or template and do not require a query for extracting the data. These merge fields can also be used as bind variables in a SQL query.

Following is the complete list of Standard Merge fields provided by Oracle Email Center for creating dynamic documents:

Customer Data Available from Customer Detail Page

Code	Description	Note
CP_LAST_NAME	Customer Last Name	PERSON_LAST_NAME from HZ_PARTIES table
CP_FIRST_NAME	Customer First Name	PERSON_FIRST_NAME from HZ_PARTIES table
CP_MIDDLE_NAME	Customer Middle Name	PERSON_MIDDLE_NAME from HZ_PARTIES table
CP_PREFERRED_NAME	Customer Preferred Name	KNOWN_AS from HZ_PARTIES table
CP_TITLE	Customer Title	PERSON_TITLE from HZ_PARTIES table
CP_2ND_TITLE	Customer Second Title	PERSON_ACADEMIC_TITLE from HZ_PARTIES table
CP_SUFFIX	Customer Suffix	PERSON_NAME_SUFFIX from HZ_PARTIES table
CP_EMAIL_ADDRESS	Customer Email Address	EMAIL_ADDRESS from HZ_PARTIES table
CP_PRIMARY_EMAIL	Customer Primary Email Address	Data from HZ_PARTIES table
CP_PRIMARY_PHONE	Customer Primary Phone Number	Data from HZ_PARTIES table
CP_HOME_PHONE	Customer Home Phone Number	Data from HZ_PARTIES table
CP_WORK_PHONE	Customer Office Phone Number	Data from HZ_PARTIES table
CP_ADDRESS	Customer Address	Data from HZ_PARTIES table
CP_ADDR_LINE1	Customer Address Line 1	ADDRESS1 from HZ_PARTIES table
CP_ADDR_LINE2	Customer Address Line 2	ADDRESS2 from HZ_PARTIES table
CP_CITY	Customer Address City	CITY from HZ_PARTIES table
CP_STATE	Customer Address State	STATE from HZ_PARTIES table
CP_PROVINCE	Customer Address Province	PROVINCE from HZ_PARTIES table

Code	Description	Note
CP_POSTAL_CODE	Customer Address Postal Code	POSTAL_CODE from HZ_PARTIES table
CP_COUNTY	Customer Address County	COUNTY from HZ_PARTIES table
CP_COUNTRY	Customer Address Country	COUNTRY from HZ_PARTIES table
CP_ORGANIZATION	Customer Organization	Data from HZ_PARTIES table
CP_PARTY_ID	Party ID for the Customer	PARTY_ID from HZ_PARTIES table
CP_PARTY_NUMBER	Party Number for the Customer	PARTY_NUMBER from HZ_PARTIES table

Contact Data Available from Contact Detail Page

Code	Description	Note
CON_LAST_NAME	Contact Last Name	Contact Data from HZ_PARTIES table
CON_FIRST_NAME	Contact First Name	
CON_MIDDLE_NAME	Contact Middle Name	
CON_PREFERRED_NAME	Contact Preferred Name	
CON_TITLE	Contact Title	
CON_2ND_TITLE	Contact Second Title	
CON_SUFFIX	Contact Suffix	
CON_EMAIL_ADDRESS	Contact Email Address	
CON_PRIMARY_EMAIL	Contact Primary Email Address	
CON_PRIMARY_PHONE	Contact Primary Phone Number	
CON_HOME_PHONE	Contact Home Phone Number	
CON_WORK_PHONE	Contact Office Phone Number	
CON_ADDRESS	Contact Address	
CON_ADDR_LINE1	Contact Address Line 1	

Code	Description	Note
CON_ADDR_LINE2	Contact Address Line 2	
CON_CITY	Contact Address City	
CON_STATE	Contact Address State	
CON_PROVINCE	Contact Address Province	
CON_POSTAL_CODE	Contact Address Postal Code	
CON_COUNTY	Contact Address County	
CON_COUNTRY	Contact Address Country	
CON_ORGANIZATION	Contact Organization	
CON_PARTY_ID	Party ID for the Contact	
CON_PARTY_NUMBER	Party Number for the Contact	

Note: For standard merge field values containing customer and contact data to be automatically populated, the agent must ensure the Customer bin is populated (e.g. the customer lookup for an incoming email has been successful or the agent manually searches for and selects a customer), prior to inserting a document or template.

Agent Data Available from JTF

Code	Description	Note
AD_USER_NAME	Agent User Name	This is the FND_USER.USER_NAME (e.g. MRABATIN)
AD_USER_FULL_NAME	Agent Full Name	Concatenation of Agent's First Name and Last Name

Miscellaneous Data

Code	Description	Note
MD_CURR_DATE	Current Date	Current System Date
MD_CURR_TIME	Current Time	Current System Time

Current Account Data

Code	Description
ACCT_REPLY_TO	Current Account Reply To Address
ACCT_FROM_NAME	Current Account From Name
ACCT_FROM_ADDRESS	Current Account From Email Address
ACCT_SIG	Current Account Signature

Current Inbound Message Data

Code	Description
INB_EMAIL_ADDRESS	Inbound Message From Address
INB_SUBJECT	Inbound Message Subject
INB_TO	Inbound Message To Address List
INB_CC	Inbound Message Carbon Copy Address List
INB_SENT_DATE	Inbound Message Sent Date
INB_CLASSIFICATION	Inbound message classification

Auto Acknowledgement Merge Field Data

Code	Description
ACK_SENDER_NAME	Auto Acknowledgment - Full Name of the Sender
ACK_SUBJECT	Auto Acknowledgment - Subject of the Inbound Email
ACK_RECEIVED_DATE	Auto Acknowledgment - Email received Date
ACK_ACCT_EMAIL_ADDRESS	Auto Acknowledgment - Account email address
ACK_ACCT_FROM_NAME	Auto Acknowledgment - Full Name of the Account

2. Custom Merge Fields - These merge fields are defined by the administrator. A value for each custom merge field must be manually entered by the agent before inserting or attaching the associated document into an outbound email. At the time when a document is inserted or attached the custom merge field placeholder(s) will be dynamically replaced with the data entered by the agent for each one respectively.

3. SQL Merge Fields - These merge fields are defined by the administrator. SQL merge fields are automatically populated with information resulting from the execution of a document's associated SQL Query. All SQL merge fields used in a document should correspond to column aliases of the Select statement portion of the document's associated SQL query. If bind variables are present in the Where clause of the SQL statement, the agent will be asked to enter valid values for them prior to executing the SQL query and, subsequently, auto-populating the document's SQL merge fields.

Bind variables do not require the use of merge field tags ((* *)) or ((? ?)).

For example, a document may contain the following two SQL merge fields: ((*Product)) and ((*Date*)):

Dear customer,

Thank you for your interest in ((*PRODUCT*)). This product will be released on ((*DATE*)).

The query to populate these fields would have the following SELECT statement:

```
SELECT
PRODUCT_NAME "((*PRODUCT*))",
RELEASE_DATE "((*DATE*))"
FROM ...
WHERE ...
```

Note: Ensure that the SQL query is written such that a default value is returned if the query returns no data, otherwise the template/response document cannot be used.

Note: The alias for the column names in the Select clause, should match the name of the merge fields in the document. Do not end the query with a semicolon (;) or forward slash (/).

For the SQL merge fields to be auto-populated after the agent inserts or attaches the document into an outbound email, Email Center requires the selected document to be physically associated with the SQL Query.

This association occurs automatically when the dynamic document is created and published to MES via Email Center's Template Editor. If the dynamic document is not created using Email Center Template Editor, manual association of the document with SQL Query is required.

Note: If you enter a SQL Merge Field in a document, but fail to associate the document with a SQL query, Email Center assumes the merge field is a custom merge field and expects the agent to manually enter a value.

Notes

Email Center agents are provided with a menu of actions for handling email interactions. For example, an agent can compose/send a brand new email, transfer an inbound email to another agent, reply to an inbound email or simply delete an inbound email. In doing so, agents may want to record a justification or explanation of their

actions and make this information available to other agents or to their supervisors who may work on or review the email interaction at a later time

Notes, also called annotations, provide agents with the ability to enter and review internal notes for any given email message. A note is related to a unique email message, whether or not the message spans across multiple interactions.

All notes associated to an email message are accessible for review via an Add Note hyperlink from the following pages:

- Message Component - Reply Screen.
- Message Component - View Message (Read Only) Screen* - this is the screen that is accessed by a supervisor when clicking on an e-mail message subject in the Supervisor Console's message summary screen.
- Customer's Interaction History - Customer Details screen.
- Interaction Threads screen.

Notes may also be entered directly from the transfer, assign, reroute and compose pages. In these cases, no Internal Notes pop-window is needed. Instead, these pages include an optional Notes text field.

The note type is based on what page you are on or what action you are taking. There are six seeded note types:

- **Assign Reason** - Assign reasons provide an explanation of why an email message is being assigned to a particular user from a supervisor.
- **Delete Reason** - Delete reasons provide an explanation of why an email message is being deleted.
- **Internal Note** - Internal notes allow you to create an internal reminder to yourself or for another agent.
- **Pushback Reason** - A Pushback Reason can be assigned to an Inbound Message when its response fails to get sent out by the Outbox Processor. This note type is assigned from the Outbox Processor Console Errors page when you select a message or messages and click **Purge**, or when you click **Purge All**.

When an administrator purges the response Outbox item, Oracle Email Center puts the original inbound message back into the responding agent's Inbox so the awaiting customer can still get the response even if there was a problem with sending out the original response.

- **Reroute Reason** - Reroute reasons provide an explanation of why an email is being rerouted to another classification group.
- **Transfer Reason** - Transfer reasons provide an explanation of why an email is being transferred from one user to another.

Oracle Text

Oracle Text, previously known as interMedia Text, is a component of the Oracle 8i and later versions of the Database. It provides a generic search, retrieval, and viewing capabilities for text. Email Center uses the Oracle Text application as part of its Intent analysis process. Oracle Text extracts a set of keywords from an incoming message and provides them to the Email Center Intent engine to identify the email intent. Once the intent for the email is identified, Email Center calls a Marketing Encyclopedia System

(MES) API that searches the Oracle Text index on the knowledge base repositories to determine appropriate response documents.

Oracle Text Processing

Email Center uses Oracle Text as part of its intent analysis process. Oracle Text extracts a set of keywords from an incoming email message and provides them to the Email Center intent engine to identify the email intent. After the intent for the email is identified, Oracle Text searches through the knowledge base repositories to determine appropriate response documents.

When used with Email Center, Oracle Text 8.1.7 performs text searches and keyword analysis in languages supported by CRM applications.

Oracle Text provides Email Center with a string of keywords and their associated scores extracted from the headers, body and any readable attachments of an incoming email message.

The quality of the intent process for a specific language is a function of not only how well the system has been “trained” and “tuned” over time by the administrator, but also the database character set and tools (such as stoplists provided by Oracle Text) used to optimize the search and retrieval of keywords.

Database Character Sets

A character set is specified when creating a database. The character set selected determines which languages can be processed by Email Center and Oracle Text. Over the years, character sets have evolved to support more than a single language. These new character sets support a group of related languages, based on the encoding scheme (that is, the same script). For example, the ISO 8859 Part 1 character set series was created to support 24 different European languages. More recently, the use of an unrestricted or universal character set, such as Unicode encompasses most major scripts of the modern world. Several character sets may meet your current language requirements, but you should consider future language requirements as well. Often, unrestricted multilingual support is needed, and a universal character set such as UTF8 is recommended as the database character set.

Oracle Text Default Stoplists

Oracle Text provides a set of default stoplists. Stoplists are lists of words which are not to be analyzed by Oracle Text. If a default stoplist exists for a language, it is used to identify the words that the system ignores during the text processing.

For example, the default English stoplist contains words such as “a,” “it,” “can,” “some,” “on,” “have,” “the,” and “they.” If an incoming email contains the text “Can I have some information on the Oracle Database?” then Oracle Text extracts the following keywords: “information,” “Oracle,” and “Database.” The other words are excluded.

An administrator can create stoplists for additional languages, and also extend the default stoplists. Please refer to the most current Oracle Text documentation for information about the available default stoplists, how to extend stoplists, and other tools for improving the precision of the linguistic analysis for a given language.

Probable Response Document Retrieval

Retrieving probable responses to an incoming email message is an extension of the Intent Analysis explained in the Intent Processing, page 2-21 topic. Each “Intent” in Email

Center has two lists of keywords associated with it. One set of keywords (Type "Q") is used to perform a match against the set of keywords (tokens or themes) extracted from the incoming email message and another set of keywords (Type "R") is used to perform a match against the index of keywords related to the documents stored in the knowledge base repositories.

After identifying one or more "intents" of the email, Email Center appends the type "R" keywords for each intent to the string of keywords extracted from the incoming email message and uses this new string to find matching documents from the knowledge base repositories. These matching documents are each assigned a score based on a complex algorithm which ultimately determines the order in which they are displayed to the agent.

This method of retrieving probable response documents from the knowledge base repositories is known as "Keyword Matching".

In this release, Oracle Email Center introduced another method for retrieving documents specifically from Marketing Encyclopedia System (MES) repository, known as "Category Mapping". This is a simplified approach where each incoming email gets mapped to one and only category in MES based on administrator defined conditions. The documents stored in that specific category are then displayed to the agent in the descending order of the usage, such that the most widely used document is on the top of the list. Please note that the administrator can still use the intent identified as one of the conditions for mapping an email to a specific category. This method does NOT apply to retrieving documents from Knowledge Management repository.

Service Requests

Email Center provides its agents with the ability to create and update service requests from within the Email Center Agent Console. This service request (SR) is associated with the email via Oracle Customer Interaction History. In addition when the agent responds to the incoming email after creating a service request, that SR number will be inserted as part of the tag information. If the customer replies back to the agent response, this SR number is then extracted and made available to the agent who can update the service request accordingly.

Tagging is a new feature that enables you to define a set of keys and values. The encrypted set of key-value pairs is referred to as a "tag" that is automatically appended to the subject of every outbound email. When the customer replies back to an outbound email, the tag and its corresponding key-value pairs are extracted and made available to the system.

Two automated processing scenarios which are available in this release are listed below. These scenarios can be manually activated when the administrator sets the appropriate system profile option.

1. Automatic update of service requests

When processing an email, if the agent creates a service request from within Email Center, the service request number is included in the tag that is appended to the response sent to the customer. If the customer replies back, then the service request number is extracted from the incoming email and can be used to update the status of the service request automatically.

2. Automatic routing of email messages to a specific agent

The ID of the agent that composes an outbound email is included in the tag by default. This agent ID will then be extracted when the customer replies and used to route the incoming email back to the agent who generated the outbound email.

SMTP Server

SMTP is an acronym for “Simple Mail Transport Protocol”. This is the standard used by Oracle Email Center to send and receive email messages from the Internet.

The SMTP server is the process that enables email messaging based on the above protocol.

Sendmail is an SMTP implementation that runs in the background, listening for incoming mail

Spell Checker

Oracle Email Center now includes spell checking capability. The spell checking engine will enable agents to spell check their email responses or spell check any new emails they compose prior to sending it. The spell checking engine will also enable administrators and supervisors to check for spelling errors while creating a document/template using the editor provided within Oracle Email Center.

Dictionaries for the following languages are available:

- American English
- Brazilian Portuguese
- British English
- Canadian English
- Danish
- Dutch
- English
- Finnish
- French
- German
- Italian
- Norwegian
- Portuguese
- Spanish
- Swedish

Additionally, a site level custom dictionary is provided, where the administrator can add words that are specific to the company/business such as company name, address, product names, common acronyms, etc.

The spell checking functionality enables users to replace a single occurrence of an incorrectly spelled word or all occurrences of that incorrectly spelled word with the correct match from the dictionary or as manually typed entry. You will also be able to ignore spelling errors identified by the spelling checker engine if you desire.

Tags

A "tag" can be defined as a container of valuable information that can be passed between a vendor and a customer using email as the communication channel. The process of appending such system or customer related data to the outbound email and extracting from an incoming email is referred to as "tagging". The data extracted can then be used for classifying and routing an email or automatically performing a processing action based on the content of the "tag". The ability to tag emails enhances the integration of Oracle Email Center with other E-Business Suite applications, whereby a specified action can be performed based on the presence, absence or value of a specific tag. For example, the outbound email could contain a service request number, a lead ID or a marketing campaign ID based on whether the email was generated from - Oracle TeleService, Oracle TeleSales or Oracle Marketing applications.

Tags fall into two categories:

- System - System tags are seeded key value pairs, which are maintained and processed by the Email Center server processing engine. The following system tags are available:
 - INTERACTION_ID - Interaction ID for the outbound email
 - AGENT_ID - The Resource ID for the agent who is sending the email
 - CUSTOMER_ID - The PARTY ID for the customer selected

The above data will be appended to every outbound email by default. Additionally, other business applications integrated with Email Center can pass a key-value pair relevant to their business using the tag listed below.
- BIZ_KEY_VAL - This is a variable key that enables business applications integrating with Email Center to pass values pertaining to their business. For e.g., the TeleService application may want to append the Service Request number whereas the TeleSales application may want to append the Lead ID.
- Custom - Custom tags are defined by the administrator. These tags are not appended to the email by default but have to explicitly associated with each email account. The custom tags could be of the following types:
 - Fixed - These keys have a fixed value.
 - Query - These keys have a SQL call for retrieving the value at run-time.
 - Procedure - These keys have a valid PL/SQL procedure call that generates the value of the key at run time.

Once a custom tag is associated with an email account, every outbound email sent from that account will automatically include this tag.

Email Center will create a tag for each outbound email comprising of the system tags and custom tags associated with that account and generate a unique encrypted ID. This unique encrypted ID is then enclosed within predefined tag markers and appended to the subject of the outgoing email as shown below:

- "Re: Please assist with my issue [REF: 1005218040]".

When a customer replies back, Email Center identifies the tag markers in the subject of the email and extracts the tag ID enclosed within. This tag ID is then decrypted and the corresponding key-value pairs made available to the processing engine for validating the processing rules.

Using Email Center Editors

If you are using Microsoft Internet Explorer, you can select to compose the your email messages in the rich text mode by clicking on the “Change to Rich Text Mode” hyperlink on the Compose or Reply page. This provides you with rich text editor functionality. You can then switch back to plain text mode by clicking on the “Change to Plain Text Mode” button displayed as part of the toggle action.

Wrap-Up Reason

Agents are required to enter a reason code for performing any of the interaction ending actions such as:

- Replying to an inbound email
- Deleting an inbound email
- Transferring an inbound email
- Rerouting an inbound email
- Composing a new outbound email

A few reason codes for each of the above actions are seeded and are available out-of-the-box. However administrators can add more custom reason codes for each action using the Oracle Customer Interaction History Administration screens. The reason code is recorded along with other interaction data and can be used for reporting. Reason codes are also seeded and recorded for every automated processing action as well.

Before You Begin

This chapter covers the following topics:

- Related Documentation
- Installing Oracle Email Center
- Accessing Oracle Email Center
- Dependencies
- System Requirements

Related Documentation

The following is a list of documentation containing information that will assist you when implementing Oracle Email Center:

- *Oracle Marketing Implementation Guide*
- *Oracle Marketing User Guide*
- *Oracle TeleSales Implementation Guide*
- *Oracle TeleSales User Guide*
- *Oracle Universal Work Queue Implementation Guide*
- *Oracle Universal Work Queue User Guide*
- *Oracle Collections Implementation Guide*
- *Oracle Collections User Guide*
- *Oracle Email Server Implementation Guide*
- *Oracle Email Server Administrator's Guide*
- *Oracle Customer Interaction History Implementation Guide*

Installing Oracle Email Center

You have the following options for installing Oracle Email Center:

Note: Prior to installation or upgrade, *always* review the readme and patch list for the Oracle Interaction Center Family Pack. The readme contains installation instructions, a summary of product changes, and a list of known issues for a family pack. The patch list contains a list of patches that are required or recommended for use with a family

pack. The patch list for each Oracle Interaction Center Family Pack is available on OracleMetaLink at <http://metalink.oracle.com>. Each patch list contains a hyperlink to the readme. (Perform an advanced search for Document ID 219238.1. Enter the document ID in the Search Field and select the Doc ID option.) This Note contains information about product specific mandatory patches which are required for your install.

- Oracle Applications Rapid Install

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

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

- Oracle Applications Maintenance Pack

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

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

When installing an Oracle Applications Maintenance Pack, you must also check the patch list for the corresponding Oracle Interaction Center Family Pack, for any new issues that have emerged since the Maintenance Pack was released. The patch list for each Oracle Interaction Center Family Pack is available on OracleMetaLink at <http://metalink.oracle.com>. (Perform an advanced search for Document ID 219238.1. Enter the document ID in the Search Field and select the Doc ID option.)

- Oracle Interaction Center Family Pack

The Oracle Interaction Center Family Packs are intended for customers who have already installed or upgraded to Oracle Applications Release 11*i* and wish to upgrade Oracle Interaction Center, or are upgrading another Oracle Applications product family, such as Oracle Service, which uses Oracle Interaction Center components, such as Universal Work Queue. The family pack is cumulative and contains only the minipacks for products in the Oracle Interaction Center family.

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

The Oracle Interaction Center Family Pack is provided as a patch and is available on OracleMetaLink at <http://metalink.oracle.com>. The patch list for

each Oracle Interaction Center Family Pack is available on OracleMetaLink at <http://metalink.oracle.com>. (Perform an advanced search for Document ID 232834.1. Enter the document ID in the Search Field and select the Doc ID option.)

Accessing Oracle Email Center

Oracle Applications uses two different technology stacks:

- Oracle Application Object Library (AOL)
- Java Technology Foundation (JTF)

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

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

Oracle Applications URL

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

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

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

CRM Home Page URL

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

http://<host>:<port>/OA_HTML/jtflogin.jsp

Personal Home Page URL:

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

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

Forms URL

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

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

User Accounts

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

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

- Username: sysadmin
- Password: sysadmin

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

Responsibilities

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

The following table describes the predefined responsibilities that are used to implement Oracle Email Center.

Responsibility	Function	Interface
Email Center Self Service Setup	Enables you to configure Email Center via the SSA console. Refer to section - Create User Accounts for Self Service Administration	HTML
Interaction History Administration JSP	Allows you to create custom reason codes and associate them with Email Center actions.	HTML
Email Center Concurrent Program Administrator	Enables you to submit and monitor Email Center related concurrent programs	Forms
Email Center Agent Console	Enables you to view the email queues and their account inboxes via the Email Center Agent Console	HTML
Email Center Message Component	Enables you to preview emails, respond to incoming emails and compose new emails.	HTML
Email Center Supervisor	Allows access to the Supervisor tab on the Agent console. This tab provides Email Center supervisors with a set of tools to better manage Email Center activities.	HTML

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

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

Dependencies

This topic group contains a list of the core products with which Oracle Email Center integrates and a brief description of each core product.

Before installing Email Center, you should have each of these products successfully installed:

- Oracle Email Server 5.2 Patch Set 1.
- Oracle Text 8.1.7.2 or later.

- Oracle Marketing Encyclopedia System, 11i.
- Oracle Foundation, 11i.
- Oracle Business Application (e.g. Oracle TeleService) for Customer creation and maintenance.

Optional Applications:

- Oracle iSupport -- Oracle Knowledge Management, formerly named the Solution Management System (SMS) component.

Oracle Email Server (OES)

Oracle Email Server is the core email system. The native email functionality is supported by this system. Oracle Email Server has both PL/SQL and IMAP interfaces and is bundled with the Sendmail implementation of SMTP service.

Oracle Email Server includes the following important sub-components:

Internet Message Access Protocol (IMAP) Server

Internet Message Access Protocol (IMAP) is the Internet protocol for retrieving mail from a server. It allows mail messages to be stored and managed on the mail server.

Message Store

The Message Store resides in an Oracle database (8.1.7.x), and it is a collection of database tables and stored procedures that implement the various email specific operations. Email accounts including folders, all incoming emails, and all outgoing emails are stored here.

Simple Mail Transfer Protocol (SMTP) Server

SMTP is a transport service capable of relaying mail across environments and typically operates over TCP, port 25. SMTP does not provide any special features outside mail transport. Sendmail is an SMTP implementation that runs in the background, listening for incoming mail.

OES PL/SQL APIs

The Oracle Email Server PL/SQL APIs extend the normal email functionality to implement rule based notifications, account maintenance, and Oracle Text processing of incoming email messages. This additional functionality results in a close integration with the Oracle Email Server product.

Known Limitations

Oracle Email Center is tightly integrated with Oracle Email Server. Other Email Services, existing or new, must integrate with this product.

Virus Detection & Handling - Please refer to the OES documentation for further information on available scripts.

Platform Dependencies

Oracle Email Server and its components are ported to most major platforms.

Oracle Text

Email Center uses the Oracle Text application as part of its Intent analysis process. Oracle Text extracts a set of keywords from an incoming message and provides

them to the Email Center Intent engine to identify the email intent. Once the intent for the email is identified, Oracle Text searches through the knowledge base repositories to determine appropriate response documents.

Oracle Text, previously known as interMedia Text, is a component of the Oracle 8i Database. It provides a generic search, retrieval, and viewing capabilities for text. When used with Email Center, Oracle Text 8.1.7 performs text searches and keyword analysis in languages supported by CRM applications. The quality of this process for a specific language is a function of not only how well the system has been "trained" and "tuned" over time by the administrator, but also the database character set and tools (such as stoplists provided by Oracle Text) used to optimize the search and retrieval of keywords.

A character set is specified when creating a database, and your choice of character set determines what languages can be processed by Email Center and Oracle Text. Over the years, character sets have evolved to support more than a single language. These new character sets support a group of related languages, based on the encoding scheme (i.e. the same script). For example, the ISO 8859 Part 1 character set series was created to support 24 different European languages. More recently the use of an unrestricted or universal character set, such as Unicode encompasses most major scripts of the modern world. Several character sets may meet your current language requirements, but you should consider future language requirements as well. Often, unrestricted multilingual support is needed, and a universal character set such as UTF8 is recommended as the database character set.

Oracle Text provides a set of default stoplists and if a default stoplist exists for a language, it will be used to identify the words that the system ignores during the text processing. For example, the Default English stoplist contains stop words such as 'a', 'it', 'can', 'some', 'on', 'have', 'the', 'they', etc. If an incoming email contains the text "Can I have some information on the Oracle Database?", when it is processed by Oracle Text the following keywords will be extracted; 'information', 'Oracle', 'Database', and words such as 'Can' and 'some' will be excluded.

An administrator can create stoplists for additional languages and also extend the default stoplists. Please refer to the most current Oracle Text documentation for the list of default stoplists available, how to extend stoplists and other tools for improving precision of the linguistic analysis for a given language.

Known Limitations

- Only bundled with Oracle 8 and higher versions. Not available on earlier versions.
- Default Stoplists are only provided for some languages.

Platform Dependencies

Ported to most major platforms.

Customer Interaction History (IH)

Oracle Customer Interaction History is an Oracle foundation component. Hence it is available to and used by all applications in the Oracle E-Business suite. The Customer Interaction History component records interactions between a customer and an agent across applications and media channels. This enables the administrator to generate and run activity reports across all media channels.

An Interaction History record is created for every incoming and outgoing email. Every Interaction must be associated with a customer. Oracle Email Center tries to find a customer by matching the email address. If however a customer cannot be identified

based on the email address, Email Center then assigns a default customer ID to the email. This default customer ID is defined while setting the site profile options.

Knowledge Base Systems (KB)

Oracle Email Center uses the following two repositories:

- Oracle Knowledge Management, formerly named the Solution Management System (SMS)
- Marketing Encyclopedia Systems (MES)

The SMS repository is a key component of the iSupport application. It stores solution sets for the most commonly reported problems. The interface to create these solution sets and maintain them is provided in the Oracle iSupport application and not in Oracle Email Center.

Oracle Email Center (Email Center) uses the Marketing Encyclopedia System (MES) as its document repository. MES provides the administrator with the capability to organize documents into various categories (or folders). The administrator can select the repositories he/she would like Email Center to search for documents/solutions based on the intent of the email by selecting the appropriate knowledge base in the site profile option settings. The Email Center agent is also allowed to browse through the MES categories only. But an agent can manually search for documents or solution sets stored in either the MES or SMS repository while composing an email.

Concurrent Manager

Concurrent Manager is a component of Oracle Application Object Library. It is responsible for scheduling and running various concurrent programs submitted by the user. It uses Distributed Concurrent Processing and can simultaneously run concurrent requests on several different server machines or CPUs. Oracle Email Center makes use of this facility to schedule and run various email processing modules.

The concurrent program will run until the specified number of messages get processed, then will wait for the specified time interval and then restarts to elapsed. The Email Center out-of-the-box concurrent process is set to (5 x 100 x 12). This means that 5 processes, processing 100 messages each and having a wait period of 12 minutes will process 500 messages (if available) before the next batch of concurrent processes (workers) starts.

Email Center does not recommend any specific number of concurrent processes that can be run at the same time because this is strictly hardware dependent and the answer would be "As many as your hardware can handle..."

Email Center uses the Oracle Applications Standard Manager to submit the following batch jobs for processing emails:

- Rebuild Help Search Index.
- Reprocess Emails in Retry Folder.
- Purge Workflow Data.
- Stop Email Processing.
- Start Email Processing
- Run Email Center Diagnostics Utility.

System Requirements

Refer to MetaLink for approximate sizes and system requirements for Oracle Applications (Oracle Email Center is included in the estimate). Information is available for:

- Approximate sizes of Oracle Application 11.5 installs
- What are the sizing requirements for Oracle Email Server 5.2
- What are the sizing requirements for Oracle Applications release 11i
- What are the system requirements for Oracle Applications 11.x
- System requirements for Apps 11i
- What are the requirements for Applications installation
- Oracle Application Object Library 11.x
- Application Install 11.x
- PROD install
- TEST install
- VIS install
- Disk usage of an install of Oracle Application

Implementation Overview

This chapter covers the following topics:

- Process Description
- Implementation Task Sequence
- Oracle Email Center Administration Overview

Process Description

The implementation of Oracle Email Center has been simplified and enhanced through the use of the Self Service Administration Console. Persons implementing Email Center should have a working knowledge of Oracle Forms, HTML, Java, and the installation platform.

This topic group contains the following:

- A checklist of the steps to perform an Email Center implementation.
- An implementation planning questionnaire that will help you determine and collect information you will need during the process.
- A worksheet for gathering the necessary information for completing the configuration module sections.

Related Topics

- Implementation Task Sequence, page 4-1
- Oracle Email Center Administration Overview, page 4-2

Implementation Task Sequence

In order to have a working Oracle Email Center, we recommend that you execute the following installation task sequences, listed below, in chronological order.

The Configuration, Rules, and Business Data steps can then be revisited to incorporate any implementation specific requirements.

Installation

Step 1: Install and configure Oracle Email Server.

Step 2: Auto install CRM Applications.

Step 3: Post install steps.

Step 4: Installation Check Point

Configuration

Step 1: Create a Default Customer.

Step 2: Create user with access to the Self Service Administration Console and Monitoring Administration.

Step 3: Set System Profiles.

Step 4: Set Site Profiles.

Step 5: Configure Email Center.

Step 6: Create email accounts.

Step 7: Create user accounts for Email Center agents.

Step 8: Define Resource Groups.

Step 9: Configuration Check Point.

Rules

Step 1: Create email processing rules.

Step 2: Associate processing rules with email accounts.

Step 3: Rules Check Point.

Business Data

Step 1: Create intents and keywords.

Step 2: Enable intent processing.

Step 3: Create hierarchical categories in MES.

Step 4: Create queries to populate merge fields.

Step 5: Create documents and templates using the template editor.

Step 6: Publish documents and templates into the MES categories created above.

Step 7: Business Data Check Point.

Related Topics

- Process Description, page 4-1
- Implementation Task Sequence, page 4-1
- Oracle Email Center Administration Overview, page 4-2

Oracle Email Center Administration Overview

Oracle Email Center is a complete solution for managing email interactions with customers, partners, suppliers, employees and other entities that interact with an organization.

Topics include:

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Email Tags, page 4-14
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Related Topics

- Process Description, page 4-1
- Implementation Task Sequence, page 4-1

Default Configuration

Oracle Email Center is initially configured using the Email Center default configuration process. The Email Center default configuration process creates an Email Center server group, defines the Oracle Email Server (OES) database to be used with Email Center, creates database links to and from the OES database and the Apps database, defines the IMAP and SMTP servers, and creates two email accounts (intent and test).

After Email Center has initially been configured, meaning that an Email Center default configuration has been created, you can access the Email Center custom configuration functionality to view or update your Email Center configuration. The Email Center custom configuration functionality can be accessed multiple times as needed.

Depending on the type of installation that you perform, the Email Center default configuration is either performed automatically by the system during the installation process or you must create the Email Center default configuration during your Email Center setup process.

The types of Email Center installations to be considered are the following:

Upgrading from a previous version of Email Center: If an Email Center implementation is performed as an upgrade to a prior release of Email Center, the existing configuration is usually migrated to the new version of Email Center. Therefore, an Email Center default configuration already exists and the Email Center default configuration pages are not available.

However, if you are upgrading from a version of Email Center prior to the 11.5.6 version, the existing configuration needs to be migrated to the new processing flow by running a migration script provided with the product. For detailed information on how to migrate your existing configuration, refer to the migration patch readme file provided with the product.

Performing a fresh installation of Email Center: When performing a fresh installation of Email Center, you must create the Email Center default configuration using the Email Center Self Service Administration Console. A fresh installation of Email Center refers

to installing the Email Center application in an environment that does not contain a previous version of Email Center *and* you are *not* installing Email Center containing the Vision data. Note: If you perform a new installation of Email Center, containing Vision data, an Email Center configuration already exists, therefore the Email Center default configuration functionality is not available. This existing configuration is not functional and you will need to remove it.

Note: If you select the Configuration subtab to access the Email Center Default Configuration functionality, after an initial default configuration has been created, you receive the following warning message: The Email Center configuration has already been setup. To view or change the configuration, use Custom Configuration under the Administration sub tab.

In the note above, an initial default configuration refers to one that was either created automatically by the system or one that was manually created using the Email Center default configuration functionality. You can view or change the existing configuration only by selecting the Administration subtab and then the Server Group, Database Server, Database Link and Email Server hyperlinks under the Email Center Custom Configuration hyperlink on the side panel.

Note: You can remove an existing configuration by removing all Server Group, Database Server, Database Link and Email Server entries. Once you have removed an existing configuration you can then access the Email Center default configuration functionality from the Configuration subtab. You must create a new Email Center default configuration after removing an existing one. For assistance in removing an existing configuration, contact your support representative.

Related Topics

- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Email Tags, page 4-14
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Database Links

When Oracle Email Center is initially configured database links are created to and from the Oracle Email Server (OES) database and the Applications (Apps) database. These links enable information to be exchanged and synchronized between your OES and Apps databases. You can create, update, and remove database links, as needed, by using the Email Center Customer Configuration functionality of the Administration subtab.

The following three links are necessary for Email Center processing and are automatically created during the Email Center default configuration process:

OES database to Apps database: The APPS user, specified for your Oracle applications, accesses this link to exchange information. This database link is a logical link.

Apps database to OES database (for the OO user): This database link is established with high-level privileges (APPS user privileges) and is required to synchronize passwords. The OO user, specified during your OES configuration process, accesses this link to synchronize information.

Apps database to OES database (for the ORAOFFICE user): This database link is used to exchange information between the Apps database and the OES database instances. The ORAOFFICE user, specified for your Oracle applications, accesses this link to exchange information.

Related Topics

- Default Configuration, page 4-3
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Email Tags, page 4-14
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Email Accounts

In order for you to receive email messages in your Email Center, you must create email accounts using functionality available from the Email Center Self Service Administration Console.

A few important concepts to remember about email accounts used with Email Center are:

- Email accounts are the accounts in which email messages are received and from which responses are sent to your customers.
- Multiple email accounts can be defined to help distribute workload and improve performance.
- Agents (resources) have to be assigned to at least one email account.
- Email processing rule must be associated with email accounts.
- Intents and matching keywords must be defined for email accounts for which the intent processing is enabled.

When you create an Email Center default configuration, the following email accounts are automatically created:

- **Test@<Domain Name>:** The email account, that can be used to test your Email Center implementation, where <Domain Name> is the name of the domain that you created for use with Email Center.

Intent@<Domain Name>: The email account that is used in establishing intents and keywords in Email Center, where <Domain Name> is the name of the domain that you created for use with Email Center.

Acknowledgements@<Domain Name>: The email account from which all auto-acknowledge emails will be sent, where <Domain Name> is the name of the domain that you created for use with Email Center.

Note: Although you can create OES email accounts using the OES configuration assistant utility, the OES functionality cannot be used to create email accounts for Email Center.

To further explain the concept of the Intent email account you need to understand what Email Center intents are and how they are used by Email Center.

Oracle Email Center (Email Center) enables your business to automatically identify the intent of email messages based on the content of the email. Oracle Text identifies the keywords which Email Center uses to identify the email intents. Email Center automatically searches the knowledge base repositories for suggested responses matching the email intent.

To set up intent and response selection processing you must train the system the characteristics of intents and responses by sending sample email messages and responses to the "intent" email account created by default.

Related Topics

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Email Tags, page 4-14
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Email Account Folders

Email Center uses folders to store all incoming email messages and a copy of all outgoing email messages. For each email account defined using the Email Center Self Service Administration Console functionality, the following folders are automatically created:

Inbox: This folder is used to store all incoming messages prior to processing.

Retry: This folder is used to store all messages that fail with API errors while they are being processed. The "Reprocess Emails in Retry Folder" concurrent manager request can be scheduled to reprocess these messages.

Admin: This folder is used to store all messages that fail while reprocessing from the Retry folder. An administrator should manually monitor this folder.

Unclassified: This folder is used to store all messages that do not match any classification rules.

Resolved: This folder is used to store all incoming messages for that particular account, after the agent responds to it and completes the send operation.

Sent: This folder is used to store a copy of every outgoing message, generated by an agent, for that particular account. These include the response to an incoming email as well as a new outbound email composed by the agent.

Deleted: This folder is used to store all incoming messages that were deleted.

Related Topics

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Email Tags, page 4-14
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Email Processing Rule Types

The processing of an email can be divided into multiple segments with a pre-defined priority among them. The incoming email needs to be categorized or classified, the unwanted emails such as bounce-backs and auto-replies should be automatically deleted, valid email inquiries should be acknowledged, routed and responded to either manually or automatically. To enable the administrator to define multiple rules for each processing segment, we have seeded six processing "rule types". Each rule type corresponds to a segment of the email processing cycle and the ordering among rule types cannot be altered. Listed below are the "rule types" in the order they will be executed:

1. **Classification** - This rule type is defined to determine the classification or category of an email. For each classification associated to an email account, a folder of same name will be created for that account.
2. **Auto-Delete** - This type of rule pertains to automatically deleting incoming emails such as bounced messages or spam without processing it.
3. **Auto-Acknowledge** - This type of rule pertains to sending an auto-acknowledgement to the sender of the email.
4. **Auto-Processing** - This type of rule pertains to processing actions that will be performed automatically on the incoming email such as create service request, create a lead, or execute a custom procedure.
5. **Auto-Redirect** - This type of rule pertains to automatically redirecting emails to different accounts.
6. **Auto-Reply** - This rule type pertains to either automatically replying to an incoming email using specified documents or redirecting it to a different email address (not forward - retaining original header info).
7. **Document Retrieval** - This rule pertains to retrieving probable response documents.

8. **Routing** - This rule type pertains to either routing an email to an agent/group of agents, replying to it using specified documents, resolving the email interaction or redirect the email to a different address (not forward - retaining original header info).

For more information on each rule type, see the following topics:

Classification Rules, page 4-10

Auto-Delete Rules, page 4-10

Auto-Acknowledge Rules, page 4-10

Auto-Processing Rules, page 4-11

Auto-Redirect Rules, page 4-11

Auto-Reply Rules, page 4-11

Document Retrieval Rules, page 4-12

Routing Rules, page 4-12

Administrators can create multiple rules for each of the above rule types and assign them a priority while associating them with individual email accounts as explained in the following sections.

Note: In general, "specific" rules that apply to a small number of emails should be assigned a high priority, whereas "generic" rules that apply to majority of the emails should be assigned a low priority.

The Oracle Email Center processing engine executes rules within each rule type starting with priority "1" till a rule is executed. Once a rule within a given rule type is executed, the email processing will jump to the next rule type unless it is a "terminating" action such as auto-delete and auto-reply. In which case, the processing of that email is terminated.

Ultimately, the incoming email will either be:

- Automatically deleted
- Automatically resolved (as part of the custom procedure/workflow execution)
- Automatically responded to or
- Routed to an agent or agent group

There are two parts to defining a rule - conditions and an action. While each rule type has its own corresponding action, the conditions for each rule type can be defined using static keys listed below or a "dynamic procedure" in the case of Classification and Routing rules.

All processing rule types have the following keys available to them for defining conditions:

- **Classification:** Classification name as determined by the "Classification" rules. This key is NOT available while defining "Classification" rules.
- **Custom Workflow Return Value:** The value returned as the result of custom workflow processing.
- **Customer ID:** The customer ID as identified by either extracting customer ID tag from the customer's response or matching the senders email address with the ones stored in the database.

- **Domain Name:** The name of the receiving domain name, for example: emailcenter.com when the email account to which the email was sent was Support@emailcenter.com. This would be the domain of your Email Center.
- **Email Intent:** The top intent, the intent with the highest score, of the email as determined by the Email Center Intent Engine processing.
- **Language:** The language of the inbound email as specified in the email extended header. The value for this key depends on the originating email system. For example, if the email originated from a Netscape Messenger email system, the value could be "EN" which specifies that the originating email system uses the English language.
- **Message Size (in Bytes):** The size of the email message, including any attachments.
- **Organization:** The organization information of the email client used by the sender. This value is picked up from the email extended header.
- **Priority:** The email priority as specified by the sender, for example: low, medium, high, highest. This value is picked up by Email Center from the email extended header.
- **Received Date:** The system date when the email was received from the sending email client.
- **Received Time (hh24:mm:ss):** The system time when the email was received from the sending email client.
- **Score Percent:** The score percentage associated with the top email intent as received from the Email Center intent engine.
- **Sender's Email Address:** The complete value of the sender email address, such as John.Smith@customer.com.
- **Subject:** The subject of the email picked up from the email subject line.
- **System Date:** The current system date when classification processing occurs.
- **System Time (hh24:mm:ss):** The current system time when classification processing occurs.
- **User Account Name:** The email account name to which the email was sent, for example: Support when the email was sent to Support@emailcenter.com.
- **Custom Tag(s):** There are custom tag keys for each of the custom tags defined in your Email Center system.

The comparison operators available while defining the conditions vary depending on the data type of the selected key.

While entering a comparison value for the key, the administrator must keep in mind the data type of the key. Majority of the keys are "text" type, for which Email Center imposes a 250-character limitation and does not permit the use of wildcard characters. However the text comparison is NOT case sensitive.

When specifying values for a numeric type key, such as Customer ID, Score Percent or Message Size, you must enter a whole integer value. Values cannot contain a decimal.

When specifying values for date or time type keys such as Received Date/Time or System Date/Time, you must enter the values in the formats shown below:

Date format: dd-mon-yyyy. If you enter the value in a different format, Email Center attempts to convert it to this format.

Time format: hh24:mm:ss, where "hh24" is a two digit number (00-23) representing an hour based on a 24 hour clock; "mm" is a two digit number (0-59) representing the minutes; and "ss" is a two digit number (0-59) representing the seconds.

Note: For time or date values, you can use the search icon to the right of the value field to select the appropriate date from a calendar or the time from a time clock.

Applying a rule to "all" incoming emails

If a generic rule is defined that applies to all emails received for a given email account then, you must select the "All Emails" check box for that rule. This check box is ONLY available while defining rules for the following rule types:

- Auto-Acknowledge
- Auto-Processing
- Auto-Reply
- Routing

The "All Emails" only applies to emails received in the email account to which the rule is associated. If for a given account, you have multiple rules within a rule type then in general you should assign a low priority to a generic rule that applies to "All Emails". The more specific rules should be assigned a higher priority.

Classification Rules

Classification rules help categorize the email based on either the "static" key values selected or the outcome of a "dynamic" procedure. When a classification rule is associated with an email account, a folder bearing the classification name is automatically created under that email account. Upon successful execution of a classification rule, the email is moved from the "Inbox" folder to the folder bearing the name of the classification rule. If none of the classification rules associated with an email account are satisfied, then the email is moved from the "Inbox" folder to the "Unclassified" folder that was automatically created during setup.

Auto-Delete Rules

Auto-delete rules allow the automatic deletion of inbound emails without processing them. If the criteria in an auto-delete rule is met by an incoming email message, further processing of the email is terminated and the email is delivered to the Delete folder for the particular account with which the rule is associated. This type of rule will prevent the processing of junk email such as bounced messages and spam.

Auto-delete rules utilize similar key/operator/value configurations as classification rules do.

Auto-Acknowledge Rules

Auto-acknowledgements are confirmation emails that are sent for every incoming email received by an email account. These emails simply confirm receipt of the incoming email and may provide some indication of when the customer can expect a response. Auto-acknowledgements do not contain any content that is used to respond to a customer enquiry.

Auto-acknowledge rules utilize similar key/operator/value configurations as classification rules do. However, since the only action possible for the auto-acknowledge rule type is to send out an email acknowledgement, you can select the MES category and the specific template from the provided lists.

Upon successful execution of the auto-acknowledge rule, Email Center will ignore other auto-acknowledge rules of a lower priority and continue processing the email.

Auto-Processing Rules

Auto-processing rules define additional processing actions that are automatically performed on incoming emails. These could either be a seeded action provided out-of-the-box such as "Update Service Request" or a custom procedure called using the "Execute Custom Procedure/Workflow."

Update Service Request

When a service request is created in response to an incoming email from Email Center Message component, the SR number is tagged to the outbound email. If the customer replies back then the SR number is extracted from the email and the corresponding service request can be updated automatically using the status code selected by the administrator while defining the rule. Upon successful completion of the "update service request" rule, the incoming is automatically moved to the "Resolved" folder and not processed any further.

Execute Custom Procedure /Workflow

You can perform any customized computation or updates as part of the email processing cycle by invoking a custom procedure or workflow. All key values that are available while defining conditions are also available as input parameters for the custom procedure or workflow. The custom process is however required to return either "Y" or "N" as the output value. This determines if the email is processed any further ("Y") or not ("N").

Auto-Redirect Rules

Auto-Redirect refers to the ability to redirect an incoming email to a different Email Center account or to an external email address based on defined rules.

Oracle Email Center provides administrators with the ability to define rules for automatically redirecting an email message. In addition to the auto-redirect rules, custom tags are extracted from incoming emails and made available as keys for the defining rules. Activities and media life cycle segments are recorded to indicate that an incoming email was automatically redirected.

Auto-Reply Rules

Auto-Reply rules enables you to define conditions which if satisfied will result in an email response being composed using the selected document(s) and sent automatically without agent intervention to the customer.

You can select multiple documents and also select which of those should be inserted into or attached to the response.

If the incoming email is responded to automatically, then the incoming email is automatically moved the "Resolved" folder and a copy of the automatically generated response is archived in the "Sent" folder for that account. The email is not processed any further.

Document Retrieval Rules

The Document Retrieval processing rule enables administrators to select a method for retrieving documents from Knowledge Base. They can choose to use the old keyword matching method, or the new MES Category Mapping method.

If “Keyword Matching” method is selected, then the administrator can select:

- Either Knowledge Management or MES repository or both.
- Select categories within MES in which to scan for documents with matching keywords.

If “MES Category Mapping” method is selected then the administrator can select one specific category to be mapped to the rule conditions.

Routing Rules

Routing rules determine the resource (agent) group to whom the email will finally get routed to. Similar to Classification rules, routing rules can either be defined using the "static" key values or the output of a "dynamic" procedure. The resource (agent) group can be selected when the routing rule is associated with an email account. This is because each account will have a different set of valid groups to which an email can be routed.

There are two types of destinations that need to be selected while associating a routing rule to an email account - "Primary Destination" and "Default Destination". If the conditions for a routing rule are satisfied then the email processing engine will first try to route the email to the agent/group selected as the "Primary Destination". If the primary resource group does not contain any agents assigned to that email account then the processing engine will route the email to the "Default Destination" group. If the default resource group does not contain any agents assigned to that account as well, then the email processing engine will route the email to all agents assigned to that email account.

While selecting the "Primary Destination" an extra option called "Original Agent" is available. Oracle Email Center appends an "Agent ID" tag to every outbound email. When the customer replies back, this tag is extracted from the incoming email and used to route the email back to the same agent if and only if the routing rule has "Original Agent" selected as the "Primary Destination".

Related Topics

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Intents, page 4-12
- Email Tags, page 4-14
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Intents

During the system configuration process, administrators have to "train" the system to help Email Center's Intent analysis engine identify the context of the email. This training

involves feeding sample keywords that would most likely be found in the incoming emails (keywords of type "Q") and sample keywords that the Intent analysis engine should look for in matching response documents (keywords of type "R"). The keywords are populated into the system by sending sample email inquiries and respective response documents that match an "intent" to the "intent@domainname.com" email account that is automatically created during the setup. The syntax of the subject line as explained in a following chapter will determine the intent, the email account and whether the sample relates to an inquiry (type "Q") or a response (type "R") .

Training Oracle Email Center for Intent Analysis

To set up intent and response selection processing, you must train the system by sending sample email messages and responses to the intent email account. Oracle Text extract keywords and their associated scores from the sample email, and Email Center creates intents and stores the keywords with associated scores in the Email Center schema.

The Email Center system can be trained to identify:

- Probable intents, which represent the purpose of the incoming email message
- Probable responses for the incoming email message

A sample message is a cleaned-up message or a piece of text that:

- Contains information directly related to the characteristics for the intent
- Should not contain any information that is not directly related to the intents for that intent

If possible, use email messages from company archives as sample email messages.

- Choose archived messages that are good representations of their intent.
- Remove greetings, signatures, and so on.
- Keep only the content that applies directly to the purpose of the intent.
- Repeat words in order to increase the score of the important words.

There should be at least one sample response for each sample message input into the system.

Note: The quality of sample messages and sample responses is a key factor for the effectiveness of the system.

Related Topics

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Email Tags, page 4-14
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Email Tags

A tag is an encrypted identification mark that is inserted into the subject line of an outgoing email message. A tag enables a company to associate valuable information with the email message, which can be used in future processing of a reply to an outbound email message.

Tags must be associated with email accounts in order to be used for email processing. Once a tag is associated with an email account, every outbound email sent from that account will have the tag id, and the values for every key in that tag, inserted into the email header.

Tags are invisible to the agent composing the email messages and are inserted into the email messages just prior to sending the email.

When a customer replies to an outbound email message, generated from the Email Center, the tag is included in the reply message. When the reply email is received by Email Center, the tag is identified and the Email Center server expands the tag, reads the key-value pairs, and passes the tag information through Email Center Auto Processing. The Auto Processing engine executes actions based on system and user defined rules.

There are two types of tags: system and custom.

System tags are seeded key value pairs, maintained and processed by the Email Center server processing engine. Examples are: INTERACTION_ID, AGENT_ID and BIZ_KEY_VAL. These are internal to the product and cannot be removed or changed. Email Center maintains seeded biz_key names for business applications that integrate with Email Center.

Custom tags are those defined and created using the Self Service Administration Console create tag functionality. Custom tags can be comprised of the following three types of keys:

- Fixed: Keys that have a fixed value.
- Query: Keys that have a SQL call for retrieving the value at run-time.
- Procedure: Keys that have a valid PL/SQL API/function call that generates the value of the key at run time.

The Email Center Administrator can define the variables that form a tag using the Self Service Administration Console functionality. A tag is comprised of one or more keys. The three components of a key are Type, Name, and Value.

Examples of Custom Tags

Fixed type tag: All outgoing emails sent from a particular account should be flagged as a Priority, so a Fixed Tag "PRIORITYMAIL" is created with a value of "Priority". When an email is sent from this account it will include this tag. When a customer responds, the tag will be extracted and the incoming email will be classified as a "Priority" email based on the value of the Tag and presented accordingly to the agent.

Query type tag: A special offer is included with every outgoing email. This offer is only valid for 10 days after the email is sent out. A Query Tag "TENDAYOFFER" is created with a value of "select trunc(sysdate) from dual". When an email is sent from this account the SQL query is executed and the resulting value included in the tag. When a customer responds, the tag is extracted and the incoming email routed to the appropriate group of agents depending on whether the reply is within the 10 days.

Procedure type tag: The ID of the Customer associated with the email message is used to look up sales volume for last month. A Procedure Tag "SALESVOL" is created with a value of "LOOKUP_UP.SALES_VOLUME". When an email is sent from this account the Procedure is executed and the resulting value included in the tag. When a customer responds, the tag is extracted and based on the Tag value the email is classified. If the value is >10000 then classify as "Premier Customer", if >5000 and <10000 then "Gold Customer", otherwise "Silver Customer".

Related Topics

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Knowledge Bases, page 4-15
- Resource Manager, page 4-16

Knowledge Bases

Oracle Email Center is integrated with two knowledge base repositories - Marketing Encyclopedia System (MES) and Knowledge Management, previously known as Solution Management System (SMS). Knowledge Management or SMS is a component which enables Oracle support applications to manage solution sets and serves as a repository of problem, diagnosis, related symptoms and their solutions. SMS is currently optional for Email Center but MES is required for use for Email Center.

While the Email Center processing engine can search both repositories for probable responses, Email Center administrators can only create and publish documents/templates in MES. The Email Center Message Component enables Email Center agents to manually search for documents in either repository based on keyword, but only enables browsing through categories defined in MES.

As Oracle Email Center is set up for use by your business, the following two types of documents must be uploaded into MES for agents to use in composing or responding to email messages:

- Suggested response documents: Documents which are presented to the agent as suggestions for responses to incoming email.
- Message format templates: Documents which are predefined style sheets for Email Center agents to use when composing responses or new email messages.

As your Email Center system is set up, a hierarchy of categories are created in MES in which you can store the Email Center related documents. These categories can be visualized as folders which help you organize your data files.

Administrators can select the MES categories and sub-categories that will be scanned for matching response documents on a per account basis. This way the documents returned by the intent analysis engine are more accurate. Email Center administrators can also select the MES category in which the templates or style sheets are stored, so that when an

agent is composing a new email, the templates stored in that category are available for "quick" insert. This is explained in the "Setting Profile Options" chapter later.

A document or a style sheet published in MES can have merge fields. These merge fields enable creating a document that can be populated with dynamic content. This is most useful for generating personalized responses using a single template or style sheet, where customer name and details could be defined as merge fields which get populated automatically when a customer is selected. Merge fields can also be populated by executing a SQL statement associated with the document. The details are explained in the "Configuring Business Data" section.

Related Topics

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Email Tags, page 4-14
- Resource Manager, page 4-16

Resource Manager

A resource group is a set of agents that can be assigned to work on a specific email account and/or a specific classification. The resource groups created are used as the destinations for the routing rules. Each resource group must have at least one agent. Resource groups created for Email Center purposes must have the "Call Center" usage assigned to it.

Related Topics

- Default Configuration, page 4-3
- Database Links, page 4-4
- Email Accounts, page 4-5
- Email Account Folders, page 4-6
- Email Processing Rule Types, page 4-7
- Intents, page 4-12
- Email Tags, page 4-14
- Knowledge Bases, page 4-15

Implementation Tasks

This chapter covers the following topics:

- Installing Oracle Email Server
- Configuring the Outbox Processor
- Starting Concurrent Programs
- Installation Checkpoint: Verification
- Defining a Administrator for Oracle Email Center Administration
- Creating a Default Customer
- Creating a Default Resource
- Setting Profile Options
- Configuring Email Center
- Creating Email Accounts
- Creating Oracle Email Center Agents and Administrators
- Configuration Checkpoint: Verification
- Configuring Processing Rules
- Rules Checkpoint: Verification
- Configuring Business Data
- Business Checkpoint: Verification

Installing Oracle Email Server

To install Email Center the following steps must be completed:

- Installing and Configuring Oracle Email Server (OES), page 5-1
- Auto Installation Process (Rapid Install Process), page 5-2

Installing and Configuring Oracle Email Server (OES):

Refer to the following documents to install and configure Oracle Email Server. Oracle Email Server was formerly known as Oracle Internet Messaging (IM).

- *Oracle Email Server 5.2 Installation Guide*
- *Oracle Email Server 5.2 Administrator's Guide*

Note: In the post-install Email Server configuration, select **NO** for LDAP install.

Guidelines

Read the content of the latest IEM readme and HTML file for important information about new features, post installation steps and other changes introduced with the release. This file is located in \$IEM_TOP/patch/115/readme directory.

This file also contains information on mandatory patches that are required on Oracle Email Server 5.2 install.

Auto Installation Process (Rapid Install Process):

The Auto Installation Process installs the schema and the core functions (Foundation Components) for Oracle applications.

Note: The Vision Platform parameters are incorrect for new installs. The Vision database contains machine specific information that is not correct for your platform. The site specific values can either be changed manually through Self Service Administration (SSA) Console Custom Configuration pages, or they can be erased as described in the IEM Readme/HTML files, and the SSA Default Configuration used to create a new configuration.

The following steps need to be completed for the Auto Installation Process.

Steps

1. Choose the desired environment for installation, such as production, test, or demonstration.
2. Select the products you need to install.
3. Select the location of the top-level directories.
4. Select the name of the configuration file.
5. Complete the steps necessary for the products you selected to install.

References for Rapid Install

Installing Oracle Applications documentation.

Refer to the following sections: How Rapid Install Works in the Installation Overview and Running Rapid Install in the Starting Your Installation.

Related Topics

- Defining a Administrator for Oracle Email Center Administration, page 5-6
- Creating a Default Customer, page 5-10
- Creating Oracle Email Center Agents and Administrators, *Oracle Email Center Implementation Guide*

Configuring the Outbox Processor

The Outbox Processor is essentially a queue for outbound emails. When an agent clicks **Send**, the outbound message is queued and processed asynchronously. The Outbox Processor will record the interaction in Oracle Customer Interaction History and archive a copy of the outbound email prior to sending the email. This asynchronous processing increases agent productivity because the agent no longer has to wait for the sent email to be processed before moving on to the next email message. The Outbox processor also provides a mechanism to generate outbound emails without agent intervention. This process can be used for generating auto replies as well as email notifications.

Note: Before you can configure the outbox processor, you must apply patch 2682863 TXK FND AUTOCONFIG ROLLUP C and you must enable AutoConfig - the Email OutBox Processor field will only appear after this prerequisite patch has been applied.

Use the following steps to configure the outbox processor.

Steps:

1. Ensure you have applied the IC Family Pack Q prerequisite patch TXK 2682863 TXK FND AUTOCONFIG ROLLUP C.
2. Run the AutoConfig Context Editor per the instructions in Metalink Note 165195.1, Appendix B: Context Editor.
3. In the Context Editor, change the Parameter **Email OutBox Processor** to blank from its current value (e.g. "#").

This parameter controls whether the Outbox processor servlet zone is commented out or enabled. Email Center users need it enabled, so the value must be blank.

4. Save the new configuration and run AutoConfig per the instructions in Metalink Note 165195.1.
5. Stop and restart the Apache server.

Note: Use the `$COMMON_TOP/admin/scripts/adapctl.sh` script.

6. Login to the CRM HTML Administration Console (use the CRM HTML Administration responsibility) and click **Settings > System > Advanced**.

The Advanced - Properties page appears.

7. From the list in the View field, select **IEM**.
8. In the Key column, click **iem.system.outboxprocessing.enabled**.

The Key Details page appears.

9. In the value column, change the property `iem.system.outboxprocessing.enabled` value to **Y**.

A value of **Y** enables Outbox processing.

10. Click **Update** to save the change.

Once you have completed these steps, you must stop and restart the Web (Apache) server for the changes to take effect.

To verify if setup is complete:

- Login to the Agent Console and send a test outbound message.
- After a minute or two, refresh the Home page and ensure the Pending count is 0 and the Count column has been incremented.

Starting Concurrent Programs

The concurrent processor runs events in the database.

The following Email Center concurrent programs will be available for submission:

- **Rebuild Help Search Index** - Rebuild the MES and KM index after publishing new documents to the repository.
- **Run Email Center Diagnostics Utility** - Gathers all the diagnostic data required for trouble shooting.
- **Purge Workflow Data** - Purges run-time custom workflow data until the specified date.
- **Start Email Processing** - This is the controller program that submits email processing workers (processes) based on the following parameters:

Start Date (DD-MON-YYYY HH24:MI:SS)

End Date (DD-MON-YYYY HH24:MI:SS)

Number Of Email Processing Workers

Number Of Emails Processed By Each Worker

Sleep Time Before Resubmitting Workers (Minutes)

Note: While the Number Of Email Processing Workers, Number Of Emails Processed By Each Worker, and the Sleep Time Before Resubmitting Workers (Minutes) values are site specific, Oracle recommends a sleep-time of at least 2 minutes. This will provide you enough time to remove a worker if you need to do so.

- **Reprocess Emails in Retry Folder** - Starts the "Retry" folder email processing worker controller.
- **Stop Email Processing** - Stops any email processing worker that is currently running.
- **Process Email Center Archive/Purge Requests** - Processes any pending Archiving/Purge requests. This program needs to be running in the background for the Archive /Purge request submitted via the Oracle Email Center Self Service Administration console to be completed successfully. If it is not running, those requests will display a "Scheduled" status.

Use the following steps to start the applicable concurrent programs.

Login

Self-Service Login URL

Responsibility

Email Center Concurrent Program Administrator

Prerequisites

None

Steps:

1. On the Navigator - Email Center Concurrent Program Administrator window, double-click **Run**.
The Find Requests window appears.
2. In the Find Requests window, click the All My Requests radio button and click **Submit a New Request**.
The Submit a New Request window appears.
3. On the Submit a New Request window, select **Single Request** and click **OK**.
The Submit Request window appears.
4. In the Name field of the Submit Request window, search for and select the name of the concurrent process you want to run.
The following are available for Email Center (see the beginning of this topic for descriptions of each):
 - Run Email Center Diagnostics Utility
 - Reprocess Emails in Retry Folder
 - Stop Email Processing
 - Rebuild Help Search Index
 - Purge Workflow Data
 - Start Email Processing

Note: As mentioned earlier, some of these processes require you to enter specific values. If the process you selected requires more information such as a Date or time, you will be prompted to provide that information.
5. Click **Submit**.

Installation Checkpoint: Verification

At this point all relevant applications should be installed and the Oracle Email Server configured to communicate with Email Center. To confirm that the installation steps were successful, complete the following prior to performing the rest of the Email Center implementation.

1. Access applications via both the Forms and HTML login pages.
2. Start the OES processes.
3. Bring up IM Admin and search for sample OES email accounts.
4. Access the Inbox of the "test@domainname.com" email account from any mail client such as Netscape Messenger or Outlook Express. This account should have been created automatically at the end of setup.
5. Send emails to "test@domainname.com" email account

6. Bring up IM Admin and display for sample OES email accounts.
7. Run any concurrent request.
8. Confirm the following:
 - Oracle applications have been successfully installed and can be accessed.
 - No errors in OES log files.
 - Can view inbound email in OES.
 - Successful completion of concurrent request.

Defining a Administrator for Oracle Email Center Administration

Perform the steps in the following table to create a user account for administering Oracle Email Center. The Number column indicates the step order. The Required column indicates whether a step is required. The Description column describes a high-level step and, where applicable, provides a reference to a more detailed topic in this document. The Responsibility column indicates the Oracle Applications user account responsibility required to complete the step.

Number	Required?	Description	Responsibility
Step 1	To submit concurrent programs To use MES	Create an employee. If Oracle Human Resource Management Systems is installed, see the Creating an Employee topic. If Oracle Human Resource Management Systems is <i>not</i> installed, see the Creating an Employee in Resource Manager topic.	HRMS Manager for Oracle Human Resource Management Systems OR CRM Resource Manager for Resource Manager
Step 2	Required	Create an Oracle Applications user account and assign responsibilities. See the Creating a User Account for Email Center Administration topic.	System Administration
Step 3	Required	Assign the JTF_FM_ADMIN role to the user account. See the Assigning the JTF_FM_ADMIN Role to a User Account topic.	CRM HTML Administration
Step 4	To use MES	Create a resource for the employee. See the Creating a Resource for an Employee topic.	CRM Resource Manager

Related Topics:

- Installing Oracle Email Server, page 5-1
- Creating a Default Customer, page 5-10
- Creating Oracle Email Center Agents and Administrators, page 5-31

Creating a User Account for Email Center Administration:

Use the following procedure to create a user account for administering Oracle Email Center.

Login

Self-Service Login URL

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. If you want to use this account to submit concurrent programs for Oracle Email Center, then select an employee to associate with this user account from the Person field.
6. In the Responsibilities tab, add the following responsibilities:

Responsibility	Function	Type
System Administrator	Create user accounts.	Self-Service
HRMS Manager, for example US HRMS Manager (if Oracle Human Resource Management System is installed)	Create an employee.	Self-Service
CRM Resource Manager	Create a resource.	Self-Service
Email Center Self Service Setup	Administer an Email Center.	HTML

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

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

7. From the **File** menu, choose **Save**.
You may close the Users window.

Related Topics:

- Assigning the JTF_FM_ADMIN Role to a User Account, page 5-36

Assigning the JTF_FM_ADMIN Role to a User Account:

The JTF_FM_ADMIN role provides access to the Query tab in the Oracle Email Center administration console. Use the following procedure to assign the JTF_FM_ADMIN role to a user account.

Login

HTML Login URL

Responsibility

CRM HTML Administration

Prerequisites

- The CRM HTML Administration user must have the JTF_SYSTEM_ADMIN_ROLE to access user maintenance functions.
- The CRM HTML Administration user must have the JTF_FM_ADMIN role to assign the role to another user.

Steps

1. Click the **Users** tab.
2. Click the **Registration** subtab.
3. Click the User Maintenance side panel link.
The Users page appears.
4. In the Enter Search Criteria fields, select Username, enter the user name, and then click **Go**.
The matching usernames appear.
5. Click the username hyperlink.
The User Details page appears.
6. Click Roles.
The User-Role Mapping page appears.
7. Move JTF_FM_ADMIN from the Available Roles list to the Assigned Roles list.

8. Click Update.
The User-Role Mapping page refreshes.

Related Topics:

- [Creating a User Account for Email Center Administration, page 5-35](#)

Creating a Default Customer

All interactions must be associated with a valid customer. Oracle Email Center will try to identify a customer record automatically by matching the email address of the incoming email to the ones stored in the customer schema. However if the email address match fails, then the agent is provided with the ability to search and select a valid customer record and associate the same with the email while responding to it. If the agent cannot find the matching customer and does not wish to create a new one, then the current interaction will be recorded against the "default customer" you select. You must create a customer record for this purpose and select it while setting Email Center site level profile options. Since Email Center does not provide the ability to create new customer records, you must create a customer using any other business application. All Oracle Applications including Oracle Email Center use the same Trading Community Architecture (TCA) customer model and hence a customer record created via any business application can be viewed and selected in Oracle Email Center as well. For information on creating a customer, refer to the documentation for the applicable Oracle business application. For information pertaining to setting the Email Center site level profile option, refer to the Setting Profile Options, page 5-11 section below.

Related Topics:

- [Installing Oracle Email Server, page 5-1](#)
- [Defining a Administrator for Oracle Email Center Administration, page 5-6](#)
- [Creating Oracle Email Center Agents and Administrators, page 5-31](#)

Creating a Default Resource

The Oracle Customer Interaction History schema requires a customer ID and a resource ID to create an interaction. Hence, like "default customer" Email Center also needs a "default resource" for recording interactions for all automated processing actions, such as Auto-Delete and Auto-Reply, performed by Oracle Email Center's email processing engine. All auto-processing interactions that do not involve an agent will use the resource number of the default resource you create here.

For more information on creating resources, see the [Creating a Resource for an Employee, Oracle Email Center Implementation Guide](#) topic.

Related Topics:

- [Installing Oracle Email Server, page 5-1](#)
- [Defining a Administrator for Oracle Email Center Administration, page 5-6](#)
- [Creating Oracle Email Center Agents and Administrators, page 5-31](#)

Setting Profile Options

There are three types of profile options that must be set for Email Center. The first two types consist of site profile options which are configured using the Oracle Email Center Self Service Administration console, and system profile options which are configured using Oracle Forms. The third type of profile options consist of profiles that Oracle Email Center utilizes for various processes. You should not alter the third type of profile options unless specifically instructed to do so by Oracle Development.

The following topics provide more information and steps for configuring profile options:

- Setting Email Center Site Profiles, page 5-11
- Setting Email Center System Profiles Set in Forms, page 5-13
- Setting UWQ Work Profiles, page 5-14
- System Profiles Used Internally by The Processing Engine, page 5-15
- System Profiles Used Internally by The "Outbox" Processing Engine, page 5-16
- System Profiles Used Internally by The Migration Scripts, page 5-16
- System Profiles no Longer Used, page 5-16

Setting Email Center Site Profiles:

Prior to configuring your Email Center, you must set the profile options for suggested response Knowledge Base search, email template Knowledge Base category, default customer, cache update frequency, sender name for outbound email and the default resource number.

Setting site options enables the configuration process to appropriately set Email Center system values related to the options set.

Use the steps below to set Email Center Site Profile options:

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the Profile icon.
2. From the side panel, click the **Email Center** hyperlink.
The Email Center Site Profile Options page appears.
3. Set the following profile options:

Email Template Knowledge Base Category - Prior to this release all templates had to be stored in an MES category named "Email Center Templates". However this hard coded requirement has now been eliminated, thereby providing you with the ability to choose any category within which you may have stored templates. To select a the category perform the following steps:

1. In the Email Template Knowledge Base Category field, click the flashlight icon.

The "Email Template Knowledge Base Category" window pops up displaying all the categories defined in the Marketing Encyclopedia System. You can expand any parent category to view the child (or sub) categories. You can also click on the "focus" icon next to parent if you only wish to view that particular category and its sub categories.

2. Check the radio button corresponding to the category you wish to select.
3. Click **Apply**.

The "Email Template Knowledge Base Category" window automatically closes and the "Email Template Knowledge Base Category" profile option is populated with the path of the selected category.

Default Spell Checking Dictionary - This profile option specifies the language used when spell checking your email messages. From the list, select the dictionary for the appropriate language you want to use for spell checking.

Spell Check Messages Before Sending - This profile option lets you determine whether Oracle Email Center will automatically start the spell checking process prior to sending your message. Select **Yes**, to have the spell checker automatically begin. Select **No**, to not automatically use the spell checker. If you select **No**, you can still manually check the spelling in your email messages.

Default Customer Number - As explained above, a valid customer record is required for recording interactions. Email interactions for which either a customer could not be identified automatically or selected manually by an agent will be recorded against this "Default Customer". To select a previously created customer record as the default, perform the following steps:

4. Click the flashlight icon.

The "Email Center Default Customer Search" screen pops up.

5. Select the search criteria by checking the corresponding radio button(s).
6. Enter the search criteria.
7. Click **Search**.

The customer records that match the search criteria are displayed.

8. Check the radio button of the appropriate customer record.
9. Click **Apply**.

The search window closes automatically and the Default Customer Number profile option is populated.

Cache Update Frequency - This profile option determines the frequency with which the Email Center Agent Console cache is refreshed. You can enter any number between 5 and 60, the unit of measurement being minutes.

Sender Name for Outbound Email - This profile enables you to indicate if the Account Sender Name or Agent Sender Name will be used to populate the "From" field for outgoing email messages. If the Account Sender Name is selected, the "Sender Name" value of the appropriate Email Account will be used. If the Agent Name is selected, the FIRST NAME and LAST NAME of the appropriate agent will be used.

Default Resource Number - All interactions must also be associated with a valid resource. Since Email Center includes automated processing actions

that do not involve an agent (resource), we need a resource number to record interactions for the same. Use the Resource Manager application (as explained in the "Creating Resources" section) to create or search for a resource that will be used by default. Make a note of the resource number and enter it in the "Default Resource Number" profile option.

Default SR Status Template - When you select a template in this profile option, upon creating an SR, the title of the template is displayed as a hyperlink in the Service Request container with "Insert" and "Attach" options underneath it. This enables agents to insert a predefined SR status template with a single click rather than having to browse through the Knowledge Base repository for templates. In the Default SR Status Template field, search for and select the template you want to use as your default service request template.

Reply to All - This profile option provides the ability to reply to all recipients copied on the incoming email. If an incoming email contains multiple email addresses in the "To" and "Cc" fields, then each of those addresses are automatically applied (copied) to the outbound response as well. From the list, select **Yes** or **No**.

Include Incoming Attachments when Replying - If you set this profile option to **Yes**, then the original attachments will automatically be attached to the reply being composed and the titles of the attachments will be displayed in the "Attachments" section. From the list, select **Yes** or **No**.

Setting Email Center System Profiles Set in Forms:

Email Center has some system profile options that required to be set for corresponding processing actions to be activated.

Use the following steps to set these profile options.

Login

Forms login URL

Responsibility

System Administrator

Prerequisites

None

Steps

1. In the Functions tab, double-click **Profile**.
2. Double-click **System**.
The Find System Profile Values page appears.
3. To set the profiles at the Site level, check the Site box.
4. Type IEM:% in the Profile field.
5. Click **Find**.
A list of profiles appears.

6. Set the following profiles:

IEM: Integration: TeleService Enabled - This option enables or disables an Email Center agent to create a service request for an incoming email from the Message Component. If the flag is set to "Y", then the "Service Request" bin is made available to the agent in the Message Component. If it is set to "N" then the "Service Request" bin is not displayed in the Message Component. By default this profile is set to No.

IEM: Message Component: Hide the delete button from agents - This option enables the administrator to make the "Delete" button unavailable to agents. If a vendor requires agents to either respond to an email or forward/transfer it to a supervisor, then the option to delete the email should not be provided. By default the value of this profile is set to "No", but if the administrator wishes to hide the "Delete" button in the Reply page from the agents, then he/she should set this to "Yes".

IEM: Message Component: Use full headers in reply - This profile option controls the header information attached to email replies. From the list, select **Yes** or **No**. A setting of **Yes** will include From, Sent, To, and Subject information directly below the ---- Original Message ---- text in the body of the email. By default, this profile is set to **No**.

IEM: Integration: Leads creation enabled - This option enables/disables the Leads integration with Email Center that allows agents to create Leads in the Message Component.

IEM: Message Component: Enable reason entry from the Reply/Compose Page - This option allows you to show/hide the Reason list on the Reply and Compose pages.

JTFRS: Group Update Access - This profile option enables you to create resource groups from the Resource Groups tab. This profile must be set to "All" to see the Create button on the Resource Groups page.

7. Click **File > Save**.

Setting UWQ Work Profiles:

There are two profile options that you can set for an agent to be able to acquire queued email messages and open emails in their inbox from the Universal Work Queue.

Enable Launching of Email Center Message Component from UWQ

This is an optional task. By default, you should be able to launch the Message Component from the UWQ desktop. If you cannot, then perform this task.

Login

Forms Login URL

Responsibility

System Administration

Prerequisites

None

Steps

1. From the Application menu select **Menu** to launch the "Menus' window.
2. In Query mode, search for 'CSX_CUSTOMER_SUPPORT' in the 'User Menu Name'.
3. Add a new row to the resulting set of Functions under this menu and add the **IEM_MC_LAUNCHER** function to this menu.
4. Save the record and exit.

Perform the following steps to enable email media counts being displayed in UWQ.

Enable Display of Email Media Counts in UWQ

Perform the following steps to enable email media counts being displayed in UWQ.

Login

Forms Login URL

Responsibility

System Administration

Prerequisites

None

Steps

1. From the Profile menu select **System** to launch the "Find System Profile Values' window.
2. Type **IEU%Email%** and search for matching system profiles.
3. Set the IEU: Queue: Inbound Email profile to **Yes**.

Note: Depending on your site requirements, you can set this profile at the 'Site,' 'Application,' or 'User' level.

System Profiles Used Internally by The Processing Engine:

The following system profiles are used internally by Email Center's processing engine and should not be altered unless instructed to do so by Oracle Development:

- **IEM: Application base version** - Email Center version related information.
- **IEM: Admin: Default customer party ID** - This system profile stores the PARTY_ID of the default customer.
- **IEM: Admin: Dummy resource ID** - Dummy resource ID.
- **IEM: Processing: Resource Id used for auto-processing** - This system profile defines the resource ID used for logging interactions. This sets the resource ID for the resource number in IEM_DEFAULT_RESOURCE_NUMBER profile.
- **IEM: Processing: Rerun Custom workflow** - This system profile defines whether a custom workflow needs to be rerun when an email is being re-processed due to a re-route or re-direct. Defaulted to 'Yes'. Valid values are 'Yes' or 'No'.

- **IEM: Processing: Rerun auto-processing Custom procedure** - This system profile defines whether a custom procedure needs to be rerun when an email is being re-processed due to a re-route or re-direct. Defaulted to 'Yes'. Valid values are 'Yes' or 'No'.

System Profiles Used Internally by The "Outbox" Processing Engine:

The following system profiles are used internally by Email Center's "Outbox" processing engine and should not be altered unless instructed to do so by Oracle Development:

- **IEM: Outbox Processing: Number of threads processing error queues** - This system profile sets the maximum number of threads the Outbox processing allows at one time in the error queues.
- **IEM: Outbox Processing: Times to retry a failed Outbox item** - This system profile sets the maximum number of times a failed outbox processing item is retried before processing is canceled.
- **IEM: Outbox Processing: Seconds to sleep between processing** - This system profile sets the number of seconds to sleep after processing all messages.
- **IEM: Outbox Processing: Number of threads processing the Outbox** - This system profile sets the maximum number of threads that can be processes at one time in the Outbox Processor.

System Profiles Used Internally by The Migration Scripts:

The following system profiles are used internally by the migration scripts and should not be altered unless instructed to do so by Oracle Development:

- **IEM: Migration: Intent Flag for accounts** - This system profile defines the intent flag for accounts that are being migrated. Valid values are 'Yes' or 'No'.
- **IEM: Migration: Oracle Email Server 'admin' password** - This system profile defines OES admin user username.
- **IEM: Migration: Oracle Email Server 'admin' user** - This system profile defines OES admin user password.
- **IEM: Migration: Oracle Email Server node name** - This system profile defines the email node for OES.

System Profiles no Longer Used:

The following profiles are no longer used by Oracle Email Center:

- **IEM: Admin: Default Interaction Center server-group** - This system profile was used in releases prior to 11.5.8. Now Email Center accounts and agents are independent of an Interaction Center Server Group.

Configuring Email Center

There are two options you can use to configure Email Center:

- Creating a Default Configuration, page 5-17
- Creating a Custom Configuration, page 5-19

Creating a Default Configuration:

For new installations, it is recommended that you use the Email Center Default Configuration. This configuration can be customized using the Email Center Custom Configuration. The Email Center Default Configuration will generate a server group, define the Oracle Email Server (OES) database, create the three database links between the OES and Applications database, define the IMAP and SMTP servers, and create three email accounts (acknowledgements, intent and test).

Once the Default Configuration has been executed or once an Email Center Custom Configuration has been set up, it will not be possible to access this page. To view or change a configuration, use Email Center Custom Configuration from the Administration subtab menu.

Removing a configuration (e.g., Removing all of the following: all server groups, database servers, database links, and email server entries) will enable access to the Email Center Default Configuration page.

Assumptions: The Email Center Default Configuration page is the simplest option for configuring Email Center. The following assumptions are made when generating the Default Configuration:

- OES database, protocol, IMAP, and SMTP processes are running on the same machine.
- OES install is set to **Custom** -- ensure that the setting is not **Default**.
- The default protocol setting is **TCP**.
- RT availability is set to **Yes**.
- Port number **143** must be assigned to the IMAP server.
- Port number **25** must be assigned to the SMTP server.
- The database server name will be automatically assigned to the same value as entered in the database SID entry field.
- Three accounts (acknowledgements, intent and test) will be generated under the domain that was entered in the domain name field of the Email Center Default Configuration page and will be assigned a language setting of English.
- Three database links will be created - One link from the Email Server to the Applications database (for the Apps user), and two links from the Applications database to the Email Server database (one of the OO user and one for the ORAOFFICE user).

Default Configuration Field Descriptions

Email Center Server Group

Field Name	Description
Name	The name of the Email Center Server Group that you wish to create. This should be a unique name. This server group contains your database server, database links, and SMTP and IMAP servers.

Oracle Email Server

Field Name	Description
IP Address	The IP address for OES.
Host Name	The machine name of the machine on which the OES database is running.
Database Listener Port Number	The SQL*Net port of the OES database.
Database SID	The standard system identification number for the database.
Database Global Name	The GLOBAL_NAME of the OES database. This value can be obtained from the GLOBAL_NAME table.
OO User Password	The password that was specified during your OES configuration process for the OO user.

Application Database

Field Name	Description
Host Name	The machine name of the machine on which the Applications database is running.
Database Listener Port Number	The SQL*Net port of the Applications database.
Database SID	The standard system identification number for the database.
Apps User Password	The password for the Apps user.

Email Account

Field Name	Description
Fully Qualified Domain Name	The OES domain name that you want to use for Email Center. This must be the fully qualified domain name that you created during your OES configuration process, for example: <company_name>.com.
Oracle Email Server Node Name	The name of the node that you created during your OES configuration process. The word node refers to an OES database instance.
Oracle Email Server Admin Password	The Password is for the user with administrative privileges for the OES database.
Language	The language you want to use for Oracle Email Center.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

You must have the Email Center Self Service Setup responsibility.

Steps

1. Click **Configuration**.

The Email Center Default Configuration page appears.

2. All fields are mandatory, and must be completed to ensure successful creation of the default configuration.
3. Enter values in all fields displayed.
4. Click **Create**. (Clicking **Cancel**, removes all data in their respective fields.)

The following confirmation message appears:

Email Center Configuration setup has been completed. To view or change the configuration, please go to Email Center Configuration under Administration.

Note: Before clicking **Create**, be certain that all the fields contain the correct data. Once you have successfully set up the default configuration, you cannot access the Default Configuration page to make changes; you must use the Custom Configuration menu option to make changes to the configuration.

Note: If you attempt to re-enter the Default Configuration page after creating a configuration, you will receive a message similar to this:

Note: Email Center configuration has already been set up. To view or change the configuration, use Custom Configuration under Administration.

The following accounts are created:

- Acknowledgement@companydomainname.com
- Intent@companydomainname.com
- Test@companydomainname.com

Creating a Custom Configuration:

If you choose not to use the default configuration, or you want to update the default configuration, you can use the Custom Configuration page.

When creating a custom configuration, you must do the following:

1. Creating a Server Group, page 5-20

2. Creating a Database Server, page 5-21
3. Creating a Database Link, page 5-23
4. Creating an Email Server, page 5-26

Creating a Server Group

The Email Center Server group is used to associate the Database server, OES processes (IMAP and SMTP), and email accounts with the server group.

Server group field descriptions

Field Name	Description
Group Name	This is a unique name that identifies the server group purpose for your business. The Email Center server group that is created using this name is the server group that contains your SMTP and IMAP servers, and OES database.
Group Description	Any free-form text that you want to use to describe the server group that you are creating.

Use this procedure to create a server group for Email Center.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Server Group**.
The Server Groups page appears.
3. Click **Create**.
The Create Server Group page appears.
4. In the Group Name field, type a unique name for the Email Center server group that you want to create.
5. In the Group Description field, type any free-form text that you want to use to describe the server group that you are creating.
6. If you want to save your work and create the server group, click **Create**.

7. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Creating a Database Server

In this step, you are defining a new Oracle Email Server (OES) database instance in Email Center by creating an OES database server using the Email Center custom configuration functionality of Email Center. However, you must have installed and configured the new OES database for use with Email Center before you can use it with Email Center.

Database Server Field Descriptions

Field Name	Description
Database Name	Any unique name that you want to assign to the OES database instance. This name is only used in Email Center.
Host Name	The name of the machine on which the OES database is running.
Port	The SQL*Net port of the OES database.
Protocol	The protocol for network communication, for example, TCP.
Database SID	The standard system identifier for the database (Oracle SID).
Database Global Name	The GLOBAL_NAME of the OES database. This value can be obtained from the GLOBAL_NAME table.
Database Description	Any free-form text that you want to use to describe the database.
Node Name	The name of the node that you created during your OES configuration process. The word node refers to an OES database instance.
Admin User	This name of the administrator user. Typically this would be the Admin user that was created during the OES installation and configuration process.
Admin Password	The Password is for the user with administrative privileges for the OES database.
Group Server	The Email Center server group to which this server is to be added.

Use this procedure to create a new database server.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Database Server**.
The Database Servers page appears displaying a summary of information for the database server defined in your Email Center system.
3. Click **Create**.
The Create Database Server page appears.
4. In the Database Name field, type any unique name that you want to assign to the OES database instance. This name is only used in Email Center.
5. In the Host Name field, type the name of the machine on which the OES database is running.
6. In the Port field, type the SQL*Net port of the database.
7. In the Protocol field, type the protocol for network communication, for example, TCP.
8. In the Database SID field, type the standard system identifier for the database.
9. In the Database Global Name field, type the global name of the OES database. This value can be obtained from the GLOBAL_NAME table. It is typically a combination of the database SID and the domain name. This field is not case sensitive.
10. In the Database Description field, type any free-form text that you want to use to describe the database.
11. In the Node Name field, type the name of the node that you created during your OES configuration process. The word node refers to an OES database instance.
12. In the Admin User field, type the name of the administrator user. Typically this would be the Admin user (for example "admin") that was created during the OES installation and configuration process.
13. In the Admin Password field, type the password for the Admin user you have entered in the previous step. This is the password that was specified during your OES configuration process for the Admin user.
14. From the Group Server list, select the Email Center server group to which this server is to be added.
15. If you want to save your work and create the database server, click **Create**.

16. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Creating a Database Link

Database links enable information to be exchanged and synchronized between your Oracle Email Server (OES) and Application (Apps) databases.

Note: To update a Database Link you must delete it and create a new link.

Database Link Field Descriptions

Field Name	Description
Link Name	The unique name given to the database link by the system.
Database SID	The standard system identifier for the email server database (Oracle SID).
Host Name	The name of the machine on which the email server database is running.
Port	The port number on which the email server database is running.
Service Name	The name that is used as the database service name. This is similar to a database connect string and it may possibly be the same as the database global_name.
User	These are the Apps, OO and ORAOFFICE users.

Note: All details displayed on the Database Links page relate to the Oracle Email Server database.

Database Link Create page Field Descriptions

Field Name	Description
Link to Email Server for OO User	
Database Name	Unique name assigned to the OES database instance.
Password	These are the passwords for the OO and ORAOFFICE users.
Link to Email Server for ORAOFFICE User	
Database Name	Unique name assigned to the OES database instance.
Password	These are the passwords for the OO and ORAOFFICE users.
Link to Email Server for Apps User	
Database Name	Unique name assigned to the OES database instance.
Password	These are the passwords for the Apps users.
Application Database	
Host Name	The name of the machine on which the application database is running.
Port Number	The port number on which the application database is running.
Database SID	The standard system identifier for the application database (Oracle SID).

Use this procedure to create the following three database links:

OES database to Apps database: The APPS user, specified for your Oracle applications, accesses this link to exchange information. This database link is a logical link.

Apps database to OES database (for the OO user): This database link is established with high-level privileges (APPS user privileges) and is required to synchronize passwords. The OO user, specified during your OES configuration process, accesses this link to synchronize information.

Apps database to OES database (for the ORAOFFICE user): This database link is used to exchange information between the Apps database and the OES database instances. The ORAOFFICE user, specified for your Oracle applications, accesses this link to exchange information.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Database Link**.
The Database Links page appears displaying the database links defined in your Email Center system.
3. Click **Create**.
The Create Database Link page appears.
4. To create an Apps database to OES database (for the OO user) database link, do the following.
 1. From the Database Link list, select **Link to Email Server Database for OO user**.
 2. Click **Go**.
The Create Database Link page appears.
 3. From the Database Name list, select the name of the OES database.
 4. In the Password field, type the password that was specified during your OES configuration process for the OO user.
 5. If you want to save your work and create the database link, click **Create**.
 6. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.
5. To create an OES database to Apps database link, do the following.
 1. From the Database Link list, select **Link to Application for APPS user**.
 2. Click **Go**.
The Create Database Link page appears.
 3. From the Database Name list, select the name of the OES database.
 4. In the Password field, type the password that was specified for the Apps user.
 5. In the Host Name field, type the name of the machine on which the Apps database is running.
 6. In the Port field, type the port number on which the database listener for the Apps database is running.
 7. In the Database SID field, type the standard system identifier for the Apps database, the Oracle SID.
 8. If you want to save your work and create the database link, click **Create**.

9. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.
6. To create an Apps database to OES database (for the ORAOFFICE user) database link, do the following.
 1. From the Database Link list, select **Link to Email Server Database for ORAOFFICE user**.
 2. Click **Go**.
The Create Database Link page appears.
 3. From the Database Name list, select the name of the OES database.
 4. In the Password field, type the password that was specified for the ORAOFFICE user.
 5. If you want to save your work and create the database link, click **Create**.
 6. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Creating an Email Server

In this step, you are defining new Oracle Email Server (OES) SMTP and IMAP processes for your Email Center system by using the Email Center custom configuration functionality.

Email Servers Field Descriptions

Field Name	Description
Server Name	The unique name that you want to assign to each SMTP or IMAP process.
DNS Name	This uniquely identifies a machine on a network.
IP Address	The IP address of the machine on which the process is running.
Port	The port on which the specified email server is running. For example, IMAP would typically run on 143, and SMTP on 25.
RT Availability	The run time availability from the drop down list. This field is used to convey to Email Center whether to use this server or not. It is possible to configure many IMAP & SMTP servers and turn them off & on as required. The default value of this field is Yes.
Group Server	The Email Center server group to which this server is to be added.
Server Type	The type of process (IMAP or SMTP).

Use this procedure to create a new Oracle Email Server (OES) SMTP and IMAP process.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration >Email Server**.
The Email Servers page appears displaying summary information for the Oracle Email Server (OES) SMTP and IMAP processes defined in your Email Center system.
3. Click **Create**.
The Create Email Server page appears.
4. In the Server Name field, type the unique name that you want to assign to the SMTP or IMAP process.
5. In the DNS Name field type the unique machine identifier on the network.
6. In the IP Address field, type the IP address of the machine on which the process is running.
7. In the Port field, type the port number on which the SMTP or IMAP process is running. For example, an SMTP process would typically run on port 25 and an IMAP process would typically run on port 143.
8. From the RT Availability list, select the run time availability from the drop down list. This field enables internal tracking of email processing. This field should be set to the default value of **Yes**.
9. From the Group Server list, select the server group to which this server is to be added.
10. From the Server Type list, select the type of process, SMTP or IMAP.
11. If you want to save your work and create the IMAP or SMTP process, click **Create**.
12. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Creating Email Accounts

To receive email messages in your Email Center, you must create email accounts to which your customers can send email. You can use the accounts functionality available from the Email Center Self Service Administration Console to set up and maintain these email accounts. When you create the email accounts using the Email Center accounts functionality, the necessary email accounts are created in both OES and in Email Center.

You can create email accounts for your business operations in both Oracle Email Server (OES) and Email Center using the accounts functionality of the Email Center Self Service Administration Console. Your email accounts must be created in OES and Email Center in order to be used with Email Center.

Note: Although you can create OES email accounts using the OES configuration assistant utility, the OES functionality cannot be used to create email accounts for Email Center.

Email Accounts Field Descriptions

Field Name	Description
Name	This is the account name that is displayed in the Email Center Agent Console and Message Component.
Email Account	This is a unique name that identifies the account in the system.
Domain	The domain name for the email account (e.g. emailcenter.com or Email Center.com). No validation is performed on the value input, therefore ensure that the valid OES domain name used for Email Center email processing is used.
Profile	Description of the Email Account.
Email Database Server	The Database Server (OES) that will be used for the Email Center processing.
Language	Language of the incoming emails being sent to this account. This is used to tie the email account being defined to a specific language for Intent Processing. Email Center supports Intent processing in multiple languages and this is accomplished using the assumption that an email account receives emails of same language.
Keyword Extraction Method	This field allows you to select the method by which keywords are extracted from the email messages. You can select to use themes or tokens. Intent analysis must be enabled for keyword extraction to take place.
Spell Checking Dictionary	This field allows you to determine what language your spell checking dictionary will use.
Reply To	A valid email account name (e.g. support@oracle.com) to which you wish to have 'reply' email messages sent to in response to an outgoing email sent from this account.

Field Name	Description
Sender Name	Default name representing the sender of emails from this account. See the Email Center Site Profiles section for more details on how this name is used.
Enable Customized Processing Flow	Email Center ships with default workflow called the 'Mail Pre-processing' workflow. If you are planning to implement any customizations to the out-of-the-box Email Center application, you can force the email processing to invoke your customizations by enabling this field.

In addition to the existing flag passed back from the Custom workflow that allows a site to indicate if further processing of the email should be performed or not, Email Center also enables a string to be passed back. This string can contain any value and is available to be used in the Classification and Routing Engines. A new key 'Custom Workflow Return Value' has been seeded that is available for creating classification and routing rules based on the custom workflow returned value.

Note: If you have not used and/or implemented any customized mail pre-processing workflows, we recommend that you disable this to avoid extra processing time. The customized processing flow is not available for the intent account.

Use this procedure to create email accounts.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps:

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Summary**.

The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.

3. On the Email Accounts page, click **Create**.

The Create Email Account page appears.

4. In the Name field, type a unique and descriptive name for the email account you are creating. You can enter a name using any combination of upper and lower case characters. This is used as the internal Email Center account name.
5. In the Email Account field, type the email account name that you wish to create for your business. This is the email account name such as "Support".
6. In the Domain field, type the domain name for the email account such as Emailcenter.com.

Note: The domain name must have been defined in OES.

7. In the Profile field, type the text description for the account.
8. From the Email Database Server list, select the email database server on which this email account needs to be created.
9. From the Language list, select the language in which Oracle Text processing occurs. The default value for this field is English.
10. From the Keyword Extraction Method list, select whether you want to use themes or tokens.

Intent analysis must be enabled for keyword extraction to take place.

For more information on keyword extraction, refer to the Intent Processing, page 2-21 topic.

11. From the Spell Checking Dictionary list, select the language you want your spell checking dictionary to utilize.
12. In the Reply To field, type a valid email account name, <email account name>@<Domain>, in which you want to receive responses to outgoing email messages. This must be a valid email account name. Note: Email Center does not perform validation checking on the value input in this field.
13. In the Sender Name field, type the name that you want the recipients of the outgoing email, sent from this account, to recognize as the sender name.
14. From the Enable Customized Processing Flow list, select the value of **Yes** or **No**. The default value is No. Select the value of Yes if you would like to enable customized workflow processing for your Email Center processing. Email Center is shipped with a default workflow called the Mail Preprocessing workflow, which was also provided with previous versions of Email Center. If you select the value of Yes, Email Center calls the Mail Preprocessing workflow and perform any customized processing defined within the workflow.

Note: If you have not implemented any customizations in the Mail Preprocessing workflow, you should select the No value for this field. Setting the value to No reduces Email Center processing time that would otherwise be used to call and execute the Mail Preprocessing workflow.

15. In the Password field, type the password for the email account.
16. In the Re-enter Password field, retype the password for the email account.
17. If you want to save your work and create the email account, click **Create**.

18. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Creating Oracle Email Center Agents and Administrators

If you have defined an administrator for Oracle Email Center, then that user has all of the responsibilities necessary to create an Oracle Email Center agent. See *Defining a Administrator for Oracle Email Center Administration*, page 5-6 for more information.

Oracle Email Center ships with five default responsibilities:

- Email Center Self Service Setup responsibility - enables the user to configure Email Center via the SSA console. Refer to section - Create User Accounts for Self Service Administration.
- Email Center Concurrent Program Administrator responsibility - enables the user to submit and monitor Email Center related concurrent programs.
- Email Center Agent Console responsibility - enables the user to view the email queues and their account inboxes via the Email Center Agent Console.
- Email Center Message Component responsibility - enables the user to preview emails, respond to incoming emails and compose new emails.
- Email Center Supervisor responsibility - allows access to the Supervisor tab on the Agent console. This tab provides Email Center supervisors with a set of tools to better manage Email Center activities.

Note: All Email Center Agents should be assigned both the Email Center Agent Console and Email Center Message Component responsibilities. If the agent is also a supervisor, then the agent user must also be assigned the Email Center Supervisor responsibility.

The process of setting up users with each of these responsibilities consists of several steps:

1. Creating an employee (forms application).
2. Creating an application user and assigning user responsibilities (forms application).
3. Assign the JTF_FM_ADMIN role to the user.
4. Creating Resources (forms application).

Administrators must be imported as CRM Resources and assigned a Role Type of "Marketing Encyclopedia", and a Role of "MES Administrator".

5. Creating Resource Groups and assigning Agents (Email Center Self Service Administration console).
6. Assigning Agents to Email Accounts (Email Center Self Service Administration console).

The following table depicts the six default responsibilities and indicates their required steps:

Responsibility Name	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Email Center Self Service Setup	X	X	X	X		
Interaction History Administration JSP	X	X	X	X		
Email Center Concurrent Program Administrator	X	X				
Email Center Agent Console	X	X		X	X	X
Email Center Message Component	X	X		X	X	X
Email Center Supervisor	X	X	X	X		

Creating an Employee:

You can create employees in two ways:

- Creating an Employee in Oracle Human Resource Management Systems, page 5-32
- Creating an Employee in Resource Manager, page 5-34

Note: If you have Oracle Human Resource Management Systems (HRMS) installed you **MUST** use it to create employees. If you do not have Oracle HRMS installed, you can use the Oracle Resource Manager to create employees.

Creating an Employee in Oracle Human Resource Management Systems

Note: If you do *not* have Oracle Human Resource Management Systems installed, then see Creating an Employee in Resource Manager, page 5-34.

Use this procedure to create an employee in Oracle Human Resource Management Systems (HRMS).

Login

Self-Service Login URL

Responsibility

HRMS Manager (for example, US HRMS Manager)

Prerequisites

None

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 information for the new person.
The following fields are required:

- Last (Name)
- Gender
- Type

Note: In the Type field, select **Employee**.

- Employee (Number)

Note: If the Employee field is inactive, then Oracle HRMS is set up to automatically generate the employee number when the record is saved.

Other fields may be required depending on how your enterprise has set up Oracle HRMS. In addition, when you save the record, you may receive one or more messages that explain the consequences of leaving certain fields blank.

4. From the **File** menu, choose **Save**.
You may close the People window.

Related Topics:

- Creating an Employee in Resource Manager, page 5-34
- Creating an Oracle Applications User Account for an Employee, page 5-35
- Assigning the JTF_FM_ADMIN Role, page 5-36
- Creating a Resource for an Employee, page 5-37
- Configuring Group Member Roles and Usage for an Agent, page 5-42

Creating an Employee in Resource Manager

Note: If Oracle Human Resource Management Systems is installed, then see the Creating an Employee in Oracle Human Resources Management Systems topic.

Use this procedure to create an employee when Oracle Human Resources Management Systems (HRMS) is not installed. This procedure populates the same database tables as the People window in Oracle Human Resource Management Systems.

Login

Self-Service Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Review *Oracle Foundation Concepts and Procedures*.

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 information for the new person.

The following fields are required:

- Last (Name)
- Gender
- Type

Note: In the Type field, select **Employee**.

- Employee (Number)

Note: If the Employee field is inactive, then Oracle Resource Manager is setup to automatically generate the employee number when the record is saved.

Other fields may be required depending on how your enterprise has set up Oracle Resource Manager. In addition, when you save the record, you may receive one or more messages that explain the consequences of leaving certain fields blank.

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

You may close the People window.

Related Topics:

- Creating an Employee in Oracle Human Resource Management Systems, page 5-32
- Creating an Oracle Applications User Account for an Employee, page 5-35
- Assigning the JTF_FM_ADMIN Role, page 5-36
- Creating a Resource for an Employee, page 5-37
- Configuring Group Member Roles and Usage for an Agent, page 5-42

Creating an Oracle Applications User Account for an Employee:

Use this procedure to create an Oracle Applications user and to associate an employee (created in Oracle Human Resource Management Systems or Resource Manager) with a user account.

Login

Self-Service Login URL

Responsibility

System Administrator

Prerequisites

None

Steps

1. In the Navigator window, on the Functions tab, choose **Security > User > Define**.
The Users window appears.
Use the following guidelines to define Oracle Applications usernames:
 - Use only alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
 - 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'), underscore, space, or hyphen.
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 and then press Tab to verify the password.
5. In the Person field, select an employee to associate with this user account.
6. In the Responsibilities tab, search for and add the appropriate responsibilities for this user.

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

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

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

You may close the Users window.

Related Topics:

- Creating an Employee in Oracle Human Resource Management Systems, page 5-32
- Creating an Employee in Resource Manager, page 5-34
- Assigning the JTF_FM_ADMIN Role, page 5-36
- Creating a Resource for an Employee, page 5-37
- Configuring Group Member Roles and Usage for an Agent, page 5-42

Assigning the JTF_FM_ADMIN Role:

The JTF_FM_ADMIN role provides access to the Query tab in the Oracle Email Center administration console. Use the following procedure to assign the JTF_FM_ADMIN role to a user account.

Login

HTML Login URL

Responsibility

CRM HTML Administration

Prerequisites

- The CRM HTML Administration user must have the JTF_SYSTEM_ADMIN_ROLE to access user maintenance functions.
- The CRM HTML Administration user must have the JTF_FM_ADMIN role to assign the role to another user.

Steps

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

The Users page appears.

4. In the Enter Search Criteria fields, select Username, enter the user name, and then click **Go**.
The matching usernames appear.
5. Click the username hyperlink.
The User Details page appears.
6. Click **Roles**.
The User-Role Mapping page appears.
7. Move **JTF_FM_ADMIN** from the Available Roles list to the Assigned Roles list.
8. Click **Update**.
The User=Role Mapping page refreshes.

Related Topics:

- Creating an Employee in Oracle Human Resource Management Systems, page 5-32
- Creating an Employee in Resource Manager, page 5-34
- Creating a Resource for an Employee, page 5-37
- Configuring Group Member Roles and Usage for an Agent, page 5-42

Creating a Resource for an Employee:

Use this procedure to create a resource for an employee (created in Oracle Human Resource Management Systems or Resource Manager) and assign that resource the appropriate roles.

Login

Self-Service Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Review *Oracle CRM Foundation Concepts and Procedures*.

Steps

1. In the Navigator window, on the Functions tab, choose **Maintain Resources > Import Resources**.
The Selection Criteria window appears.
2. In the Resource Category field, select **Employee**.
3. Enter any additional selection criteria.
For example, in the Name field, select the name of an employee.
4. Click **Search**.

Employees that meet the search criteria are listed in the Search Results area. The Select checkboxes for the matching employees are automatically selected.

5. Clear the Select checkboxes of the employees for whom you do not want to create a resource.

6. Click **Create Resource**.

The Default Values window appears. You can add or modify this information in the resource details later.

7. Click **OK** to accept the defaults.

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

8. Clear the Select checkboxes of the employees that you do not want to save as a resource.

9. To save the resources, click **Save Resource**.

A transaction number appears in the Transaction Number field. The transaction number is associated with each resource created during this transaction. More than one resource can have the same transaction number.

10. To view the details about a resource, select the resource and then click **Details**.

The Resource window appears. Verify the name of the resource (Name), the name of the employee (Source Name), and the user name (User Name) and note the resource number (Number).

11. In the Roles tab, assign one or more roles to the resource.

1. In the Role Type field, select a role type.
2. In the Role field, select a role.
3. For users with the Email Center Agent Console Responsibility assigned: Select **iCenter** from the drop down list for Role Type and select **Email Center Agent** from the drop down list for Roles.
4. For users with the Email Center Self Service Setup Responsibility assigned: Select **Marketing Encyclopedia** from the drop down list for Role Type and select **MES Administrator** from the drop down list for Roles.

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

You may close the Resource and Research Search Results windows.

Related Topics:

- Creating an Employee in Oracle Human Resource Management Systems, page 5-32
- Creating an Employee in Resource Manager, page 5-34
- Creating an Oracle Applications User Account for an Employee, page 5-35
- Configuring Group Member Roles and Usage for an Agent, page 5-42

Creating Resource Groups:

The Email Center Self Service Administration console allows you to create resource groups.

Use the following steps to create a resource group and assign agents to it.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

Ensure email accounts and Email Center agents have been created.

Ensure that the profile setting for JTFRS: Group Update Access has been set to **All**, or the **Create** button will not appear on the Resource groups page. For more information on configuring profiles, refer to the Setting Email Center System Profiles Set in Forms topic.

Steps

1. Click the **Resource Groups** tab.
The Groups page appears.
2. In the Groups page, click **Create**.
The Create Group page appears.
3. In the Name field, type a name for the resource group you are creating.
4. In the Start Date field, use the calendar tool to select a start date for your resource group.
5. From the list in the Usage column, select **Call Center** as the group usage.
You can assign multiple usages to the group, but the **Call Center** usage **MUST** be assigned.
6. From the list in the Category column, select **Employee**.
7. From the list in the Resource Name column, search for and select the name of the agent you want to assign to the resource group.
8. From the list in the Role Type column, select **Icenter**.
9. From the list in the Roles column, search for and select one of the following roles:
 - **Email Center Manager**
 - **Email Center Supervisor**
 - **Email Center Agent**
10. From the list in the Start Date column, use the calendar tool to select the appropriate start date.
11. Repeat steps 6 -10 for each agent you want to assign to the resource group.
12. Click **Create**.
The resource group is created and the selected agents are assigned to it.

Related Topics:

- Creating an Employee in Oracle Human Resource Management Systems, page 5-32
- Creating an Employee in Resource Manager, page 5-34
- Creating an Oracle Applications User Account for an Employee, page 5-35
- Configuring Group Member Roles and Usage for an Agent, page 5-42

Performing the Agent — Email Account Assignment:

Before an agent can begin work on an email account, the agent must be linked to the account. There are two ways you can link agents and email accounts:

Assigning Email Accounts to Agents, page 5-40

Assigning Agents to Email Accounts, page 5-41

Related Topics:

- Creating an Employee in Oracle Human Resource Management Systems, page 5-32
- Creating an Employee in Resource Manager, page 5-34
- Creating an Oracle Applications User Account for an Employee, page 5-35
- Configuring Group Member Roles and Usage for an Agent, page 5-42

Assigning Email Accounts to Agents

Use this procedure to assign one or more email accounts to an Email Center agent.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Agents** (under the Accounts section).
The Agents and Accounts Assignment page appears.
3. From the list in the Assign field, select **Accounts to Agents** and click **Go**.
4. Enter the search criteria to search for the agent(s) you want to assign to an email account.
 1. If you want to search for an agent using the agent's user name, in the Agent User Name field, type the name of the agent.
 2. If you want to search for an agent using the first name of the agent, in the First Name field, type the first name of the agent.

3. If you want to search for an agent using the last name (family name) of the agent, in the Last Name field, type the last name of the agent.
4. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.
5. If you want to search for an agent based on their assigned Email Center resource roles, from the Resource Role list, select the resource role.

5. Click **Search**.

The agent search results appears listing the agents which were found to match the given search criteria.

6. In the Select column, select the box next to the agent user name of the user you want to assign to email accounts.
7. Click **Assign Email Account**.

The Assign an Email Account to an Agent page reappears with the list of available email accounts displayed in the Available Email Account list. The Assigned Email Account list displays the list of email accounts that had previously been assigned to the agent.

Note: A number is listed in brackets next to email account names displayed in the Assigned Email Account list. This number represents the number of email messages currently in the agent's account Inbox.

8. To assign selected email accounts to the agent, do one of the following:
 1. From the Available Email Account list, double-click the email account(s) that you want to assign to the agent.
 2. From the Available Email Account list, select the account(s) that you want to assign to the agent and then click the Move icon.

Note: You can select multiple accounts by holding down the Shift key or the Ctrl key.

9. If you want to assign all available email accounts to the agent, click the Move All icon.
10. If you want to save your work and assign the email account(s) to the agent, click **Apply**.

A confirmation message appears indicating that the email account(s) has been successfully assigned to the agent.

Assigning Agents to Email Accounts

If more than one Email Center agent needs to be assigned to the same email account, the Assign Agent to an Email Account option can be used.

Use this procedure to assign an agent to an email account.

Prerequisites

Create the email account.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Agents** (under the Accounts section).
The Agents and Accounts Assignment page appears.
3. From the list in the Assign field, select **Agents to Accounts** and click **Go**.
4. From the list in the Email Account field, select the email account to which you want to assign an agent and click **Go**.

The Assign an Agent to an Email Account page refreshes with the list of available agents displayed in the Available Agents list. The Assigned Agents list displays the list of agents that had previously been assigned to the email account.

Note: A number is listed in brackets next to agent names displayed in the Assigned Agent list. This number represents the number of email messages currently in the agent's account Inbox.

5. If you want to assign selective agents to the email account, do one of the following.
 1. From the Available Agents list, double click to select the agent that you want to assign to the email account.
 2. From the Available Agents list, select the agent(s) that you want to assign to the email account and then click the Move icon.

Note: You can select multiple agents by holding down the Shift key or the Ctrl key.

6. If you want to assign all available agents to the email account, click the Move All icon.
7. If you want to save your work and assign the agent(s) to the email account, click **Apply**.

A confirmation message appears indicating that the agent(s) has been successfully assigned to the email account.

Configuring Group Member Roles and Usage for an Agent:

Resource groups are destinations for routed items. Use this procedure to configure group member roles and usage for a resource in a group.

Login

HTML Login URL

Responsibility

CRM Resource Manager

Prerequisites

- Create an employee.
- Create an Oracle Applications user account for the employee.
- Create a resource for the employee.
- Review *Oracle CRM Foundation Implementation Guide*.
- Review *Oracle TeleSales Implementation Guide*.

Steps

1. In the Navigator window, on the Functions tab, choose **Resource Manager > Maintain Resources > Groups**.

The Define Groups window appears.

2. Find a group or create a group by entering a group name.
3. In the Members tab, add a resource to the group.

1. In the Category field, enter **Employee**.

2. In the Number field, enter the resource number or, in the Name field, enter the name of the resource.

3. Click **Member Roles**.

The Member Roles window appears.

4. In the Role Type field, select a role type.

Note: Only the roles assigned to the resource in the Resource window Roles tab will be available for selection in the Member Roles window for a group member.

5. In the Role field, select a role.
6. Click **OK**.
4. In the Usages tab, enter one or more usages for the group.

The following table lists the minimum usages required to access application or media work in Oracle Universal Work Queue. Additional usages may be required to enable additional functionality in the business application. For more information, consult the implementation guide for the business application.

To use this application or feature...	Select this usage...
Oracle TeleSales	Sales and TeleSales
Oracle TeleService	No usage requirement.
Oracle Advanced Inbound, Oracle Advanced Outbound, Email Center	Call Center

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

You may close the Define Groups window.

Note: Enter an End Date only if you want to terminate the group. Use extreme caution when utilizing this feature.

Related Topics:

- Creating an Employee, page 5-32
- Creating an Oracle Applications User Account for an Employee, page 5-35
- Assigning the JTF_FM_ADMIN Role, page 5-36
- Creating a Resource for an Employee, page 5-37

Configuration Checkpoint: Verification

At this point a basic Email Center configuration, multiple email accounts and one or more user accounts created. Complete the following steps prior to performing the Rules Module steps, in order to confirm that the Configuration steps were successful.

1. Execute a SQL statement to test each Database Link, for example, "select instance_name from v\$instance@<dblinkname>"
2. Ensure intent processing is disabled. By default, intent processing is disabled for all accounts. However, at this point, we recommend you test your configuration with the intent processing disabled. If you require intent processing as part of your implementation, a later step will allow you to enable the Intent Processing. To verify intent processing is disabled, perform the following:
 1. Login to the HTML Login URL and select the Email Center Self Service Setup responsibility.
 2. Click the **Administration** subtab.
 3. From the side panel, click **Intents**.
 4. Click **Options**.
 5. Ensure all email accounts are listed in the Disabled Email Accounts field.
 6. If one or more email accounts appears in the Enabled Email Accounts field, click **Remove All**.
 7. Click **Apply**.
3. Submit the concurrent program request to run Start Email Processing.
Submitting request to run Start Email Processing:
 1. Log in to the self-service (forms) Login URL and select the Email Center Concurrent Program Administrator responsibility.
The Navigator-Email Center Concurrent Program Administrator window appears, displaying a list of functions.
 2. Double click **Run**.
The Submit a New Request box appears.
 3. Select the **Single Request** option.

4. Click **OK**.
The Submit Request page appears.
5. From the list in the Name field, select **Start Email Processing**.
6. Click **OK** to accept default parameters or enter the relevant parameters.
7. For example:

Example

Start Date (DD-MON-YYYY HH24:MI:SS) 6-MAR-2003 10:31:38

Example

End Date (DD-MON-YYYY HH24:MI:SS)

Example

Sleep Time Before Resubmitting Workers (Minutes) 5

Example

Number of Email Processing Workers 2

Example

Number of Emails Processed by Each Worker 100

8. Click **Submit**.
Note: There are 6 other concurrent programs also used for Email Center:

- Rebuild Help Search Index
- Reprocess Emails in Retry Folder
- Purge Workflow Data
- Stop Email Processing
- Run Email Center Diagnostics Utility
- Process Email Center Archive/Purge Requests

1. Send a sample email to one or more email accounts created in the Self Service Administration console.
2. Log in to the HTML Login URL and select the Email Center Agent Console responsibility.
3. Get Message and Respond to Email.
4. Confirm the following:
 - Each Database Link between the Application and Oracle Email Server Databases is functional.
 - No errors in Concurrent process log files for Email Center.
 - No emails in the OES Retry/Admin folders.
 - Successful access to Email Center Agent Console.
 - Email counts visible in Home Page
 - Able to Get Messages and respond to an email

- Customer search successful
- Receipt of sent email

Configuring Processing Rules

This section covers the steps required to do the following:

- Creating Classifications and Associating Them With Accounts, page 5-46
- Creating Auto-Delete Rules and Associating Them With Accounts, page 5-49
- Creating Auto-Acknowledge Rules and Associating Them With Accounts, page 5-51
- Creating Auto-Processing Rules and Associating Them With Accounts, page 5-54
- Creating Auto-Redirect Rules and Associating Them With Accounts, page 5-57
- Creating Auto-Reply Rules and Associating Them With Accounts, page 5-60
- Creating Document Retrieval Rules and Associating Them With Accounts, page 5-62
- Creating Routing Rules and Associating Them With Accounts, page 5-65

Creating Classifications and Associating Them With Accounts:

Classifications are user-defined categories or queues that emails are placed in depending upon their properties and content. For example, classifications could be used to define various service levels, distinguish between customers, etc. Classifications can also be used by the other types of processing rules as one of the criteria upon which an email is delivered to a group of agents.

For incoming emails addressed to a specific account to be assigned to the respective queue, one or more classifications must be associated to that email account. The Account Association page enables classifications to be associated with an email account. This account association must be enabled in order for a classification to be executed. Classifications that are not enabled will not be executed. Classification priorities are used to determine the order in which each classification and its rules are executed. The priority of each classification is unique; the priority can be changed; and, in doing so, it will affect the values of other classification priorities. By default, newly defined classifications are assigned the lowest priority among the existing classifications.

The process of creating classifications involves two tasks:

Creating Classifications, page 5-46

Associating Classifications With Accounts, page 5-48

Creating Classifications

Use the steps below to create a classification.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.

The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.

The Create Classification page appears.
4. In the Classification Name field, type a name for the classification you are creating.
5. Optionally, in the Description field, type a short description for the classification.
6. From the list in the Classification Type field, select **Static** or **Dynamic** and click **Go**.

Static classifications classify based on specific criteria you designate using conditions (key/operator/value).

Dynamic classifications classify based on criteria Email Center does not know out of the box. For example: if you wanted to classify incoming emails as "Gold" based on revenue statistics which exist in some customized table or external system, you can write a procedure that determines the value parameter by which the email would be classified as "Gold" or not.
7. If you selected **Static**, the Create Classification page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
 1. From the list in the Key field, select a key for the classification rule you are creating.
 2. From the list in the Operator field, select an operator for the classification rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the classification rule you are creating.
8. If you selected **Dynamic**, the Create Classification page refreshes to display a procedure area where you can define the procedure name and variables you want to use.

Note: When creating dynamic classification rules, please follow the TIP guidelines on what kind of procedures can be used. The procedure will fail if the procedure does not follow the criteria specified in the TIP.

 1. In the procedure Name field, type a name for the procedure you will use for your dynamic classification.

2. In the list in the OUT Parameter Type field, select the data type you want to use for your classification.
 3. From the list in the Operator field, select an operator for the classification rule you are creating.
 4. From the list in the Value field, search for and select, or type a value for the classification rule you are creating.
9. Click **Create**.

The Email Processing Rules page refreshes and the new classification rule is displayed in the summary view table.

Associating Classifications With Accounts

Use the following steps to associate a classification rule with an email account.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Accounts > Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the classification rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Classification Name column, select the classification rule you want to associate to the email account.
7. Click **Apply**.

The selected classification rule is added to the summary view table and its name is displayed as a hyperlink in the Classification Name column. You can view the components of or update the classification by clicking the hyperlinked name in the Classification Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second classification rule is associated to the email account.

8. If you are associating additional classification rules to an email account, use the Priority list to determine a hierarchy among the classification rules.

Note: Rules cannot share the same priority level. In general, you should assign a high priority to more specific rules and a low priority to generic rules.

9. Ensure the Enabled box is checked for each classification rule you want to use.
10. Click **Apply**.

Creating Auto-Delete Rules and Associating Them With Accounts:

Auto-delete rules allow the automatic deletion of inbound emails without processing them. If the criteria in an auto-delete rule is met by an incoming email message, further processing of the email is terminated and the email is delivered to the Delete folder for the particular account with which the rule is associated. This type of rule will prevent the processing of junk email such as bounced messages and spam.

The process of creating auto-delete rules involves two tasks:

Creating Auto-Delete Rules, page 5-49

Associating Auto-Delete Rules With Email Accounts, page 5-50

Creating Auto-Delete Rules

Use the following steps to create an auto-delete rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.

The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.

3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Delete.
The Create Auto-Delete Rule page appears.
4. In the Name field, type a name for the auto-delete rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-delete rule.
6. From the list in the Key field, select a key for the auto-delete rule you are creating.
7. From the list in the Operator field, select an operator for the auto-delete rule you are creating.
8. From the list in the Value field, search for and select, or type a value for the auto-delete rule you are creating.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

Note: If **And** is selected, every condition defined must be evaluated as true in order for the rule to be used. If **Or** is selected, the rule will be applied if any of the conditions contained in it are evaluated as true. Conditions are evaluated in the order that they are listed.

10. Repeat steps 6-8 for each condition you want to add to the rule.
11. Click **Create**.

The Email Processing Rules page refreshes and the new auto-delete rule is displayed in the summary view table.

Associating Auto-Delete Rules With Email Accounts

Use the following steps to associate an auto-delete rule with an email account.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Accounts > Processing Rules**.

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.

3. From the list in the Email Account field, select the email account to which you want to assign the auto-delete rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Delete.

The Account Association page appears.

5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-delete rule you want to associate with the selected email account.
7. Click **Apply**.

The selected auto-delete rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-delete rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-delete rule is associated to the email account.

8. If you are associating additional auto-delete rules to an email account, use the Priority list to determine a hierarchy among the auto-delete rules.

Note: Rules cannot share the same priority level. In general, you should assign a high priority to more specific rules and a low priority to generic rules.

9. Ensure the Enabled box is checked for each auto-delete rule you want to use.
10. Click **Apply**.

Creating Auto-Acknowledge Rules and Associating Them With Accounts:

Auto-acknowledgements are confirmation emails that are sent for every incoming email received by an email account. These emails simply confirm receipt of the incoming email and may provide some indication of when the customer can expect a response. Auto-acknowledgements do not contain any content that is used to respond to a customer enquiry.

An "All emails" option is provided. In most cases you may want to send an acknowledgment to all emails received apart from the ones that get automatically deleted. You can easily do so by checking the "All Emails" box.

Note: If you check the All Emails box, you do not need to provide conditions for the auto-acknowledge rule. If the All Emails box is checked, any conditions for that rule will be ignored.

If you want to be more specific as to which incoming emails receive an auto-acknowledgement, you can use the provided key/operator/value combinations to set specific conditions for when an auto-acknowledgement will be sent out. Additionally

this also enables you to select a different acknowledgement template for email accounts and different classifications within the same email account.

Since the only action possible for the auto-acknowledge rule type is to send out an email acknowledgement, you can select the MES category and the specific template from the provided lists.

Upon successful execution of the auto-acknowledge rule, Email Center will ignore other auto-acknowledge rules of a lower priority and continue processing the email.

Once you have created auto-acknowledgement documents in MES to use (for more information on creating MES documents, refer to the *Creating Documents, Oracle Email Center Implementation Guide* topic), the process of creating auto-acknowledge rules involves two tasks:

Creating Auto-Acknowledge Rules, page 5-52

Associating Auto-Acknowledge Rules With Email Accounts, page 5-53

Creating Auto-Acknowledge Rules

Use the following steps to create an auto-acknowledge rule.

Prerequisites

Auto-acknowledge templates must already have been created in MES.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Acknowledge.
The Create Auto-Acknowledge Rule page appears.
4. In the Name field, type a name for the auto-acknowledge rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-acknowledge rule.
6. If you want to send an auto-acknowledgement to all emails coming into the email account to which this rule is associated, click the **All Emails** box.

Note: If you check the All Emails box, you do not need to provide conditions for the auto-acknowledge rule. If the All Emails box is checked, any conditions for that rule will be ignored.

7. If you do not want auto-acknowledgements to go out to all emails, use the Key, Operator, and Value fields to specify the conditions when an auto-acknowledgement should be sent to an incoming email.
 1. From the list in the Key field, select a key for the auto-acknowledge rule you are creating.
 2. From the list in the Operator field, select an operator for the auto-acknowledge rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the auto-acknowledge rule you are creating.
8. Repeat step 7 for each condition you want to add to the rule.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

Note: If **And** is selected, every condition defined must be evaluated as true in order for the rule to be used. If **Or** is selected, the rule will be applied if any of the conditions contained in it are evaluated as true. Conditions are evaluated in the order that they are listed.

10. From the list in the Category field, select the template category that contains the template you want to use for your auto-acknowledgement.
11. From the Template field, select the template you want to use for your auto-acknowledgement.
12. Click **Create**.

The Email Processing Rules page refreshes and the new auto-acknowledge rule is displayed in the summary view table.

Associating Auto-Acknowledge Rules With Accounts

Use the following steps to associate an auto-acknowledge rule with an email account.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Accounts > Processing Rules**.

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.

3. From the list in the Email Account field, select the email account to which you want to assign the auto-acknowledge rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Acknowledge.

The Account Association page appears.

5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-acknowledge rule you want to associate to the selected email account.
7. Click **Apply**.

The selected auto-acknowledge rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-acknowledge rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-acknowledge rule is associated to the email account.

8. If you are associating additional auto-acknowledge rules to an email account, use the Priority list to determine a hierarchy among the auto-acknowledge rules.

Note: Rules cannot share the same priority level. In general, you should assign a high priority to more specific rules and a low priority to generic rules.

9. Ensure the Enabled box is checked for each auto-acknowledge rule you want to use.
10. Click **Apply**.

Creating Auto-Processing Rules and Associating Them With Accounts:

Auto-processing rules define the processing actions that are automatically performed on incoming emails. Such actions include updating service requests or executing a custom procedure.

Note: When creating auto-processing rules, you have two choices:

- **Update Service Request** - A seeded auto-processing action that will be performed if SR number tag is found in the email. When defining a rule of this type, you must also select a valid status code.
- **Execute Custom Procedure/Workflow** - Ability to call any custom PL/SQL procedure that will be executed as part of email processing. All header and tag values extracted from the email are available as input parameters. The custom procedure however can

only return "Y" (to further continue email processing) or "N" (to discontinue email processing) as the output parameter.

The process of creating auto-processing rules involves two tasks:

Creating Auto-Processing Rules, page 5-55

Associating Auto-Processing Rules With Email Accounts, page 5-56

Creating Auto-Processing Rules

Use the following steps to create an auto-processing rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Processing.
The Create Auto-Processing Rule page appears.
4. In the Name field, type a name for the auto-processing rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-processing rule.
6. If you want the auto-processing rule to apply to all incoming emails, click the All Emails box.

Note: If you check the All Emails box, you do not need to provide conditions for the auto-processing rule. If the All Emails box is checked, any conditions for that rule will be ignored.

7. If you want your auto-processing rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-processing rule should be applied to an incoming email.
 1. From the list in the Key field, select a key for the auto-processing rule you are creating.

2. From the list in the Operator field, select an operator for the auto-processing rule you are creating.
3. From the list in the Value field, search for and select, or type a value for the auto-processing rule you are creating.
8. Optionally, repeat steps 7 for each condition you want to add to the rule.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

Note: If **And** is selected, every condition defined must be evaluated as true in order for the rule to be used. If **Or** is selected, the rule will be applied if any of the conditions contained in it are evaluated as true. Conditions are evaluated in the order that they are listed.

10. From the list in the Action field, select the action you would like your auto-processing rule to perform.
11. The parameter value depends on the action you have selected in step above.
 1. If you selected **Auto Update SR** as the action in the step above, then select a status code from the drop-down list available.
 2. If you selected **Execute Custom Procedure/Workflow** as the action in the step above, then enter the name of a valid pre-defined PL/SQL procedure.
12. Click **Create**.

The Email Processing Rules page refreshes and the new auto-processing rule is displayed in the summary view table.

Associating Auto-Processing Rules With Accounts

Use the following steps to associate an auto-processing rule with an email account.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Accounts > Processing Rules**.

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.

3. From the list in the Email Account field, select the email account to which you want to assign the auto-processing rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Processing.

The Account Association page appears.

5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-processing rule you want to associate to the selected email account.
7. Click **Apply**.

The selected auto-processing rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-processing rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-processing rule is associated to the email account.

8. If you are associating additional auto-processing rules to an email account, use the Priority list to determine a hierarchy among the auto-processing rules.

Note: Rules cannot share the same priority level. In general, you should assign a high priority to more specific rules and a low priority to generic rules.

9. Ensure the Enabled box is checked for each auto-processing rule you want to use.
10. Click **Apply**.

Creating Auto-Redirect Rules and Associating Them With Accounts:

Auto-redirect rules enable you to redirect the incoming email to another Oracle Email Center account or an external email address.

The process of creating auto-redirect rules involves two tasks:

Creating Auto-Redirect Rules, page 5-57

Associating Auto-Redirect Rules With Email Accounts, page 5-59

Creating Auto-Redirect Rules

Use the following steps to create auto-redirect rules.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Redirect.
The Create Auto-Redirect Rule page appears.
4. In the Name field, type a name for the auto-redirect rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-redirect rule.
6. From the Action list, select whether you want to redirect emails to an internal or external address, and click **Go**.
7. If you want the auto-redirect rule to apply to all incoming emails, click the All Emails box.
Note: If you check the All Emails box, you do not need to provide conditions for the auto-redirect rule. If the All Emails box is checked, any conditions for that rule will be ignored.
8. If you want your auto-redirect rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-redirect rule should be applied to an incoming email.
 1. From the list in the Key field, select a key for the auto-redirect rule you are creating.
 2. From the list in the Operator field, select an operator for the auto-redirect rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the auto-redirect rule you are creating.
9. Optionally, repeat the previous step for each condition you want to add to the rule.
Be sure to select how you want the conditions joined together from the Rule Chaining list.
10. For redirects to external accounts:
 1. In the Email Address field, type the address to which you want to redirect incoming email.

2. From the **Category** list, select the template category containing the template to be used as the message body for the redirected email message.
3. From the **Template** list, select the template you want to use as the message body for the redirected email message.
11. For redirects to internal accounts, from the **Email Address** list, select the account to which you want to redirect the message.
12. Click **Create**.

The **Email Processing Rules** page refreshes and the new auto-redirect rule is displayed in the summary view table.

Associating Auto-Redirect Rules With Accounts

Use the following steps to associate an auto-redirect rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the **Accounts** section, click **Processing Rules**.
The **Assign Email Processing Rules** page appears, displaying a summary view table of all email processing rule types.
3. From the list in the **Email Account** field, select the email account to which you want to assign the auto-redirect rule(s) and click **Go**.
The summary view table on the **Assign Email Processing Rules** page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the **Email Processing Rules by Type** column.
4. In the **Add/Delete** column, click the add icon (plus sign) corresponding to **Auto-Redirect**.
The **Account Association** page appears.
5. Ensure that the correct email account is displayed in the **Email Account** field.
6. From the list in the **Rule Name** column, select the auto-redirect rule you want to associate to the selected email account.
7. Click **Apply**.

The selected auto-redirect rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-redirect rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-redirect rule is associated to the email account.

8. If you are associating additional auto-redirect rules to an email account, use the Priority list to determine a hierarchy among the auto-redirect rules.

Note: Rules cannot share the same priority level.

9. Ensure the Enabled box is checked for each auto-redirect rule you want to use.
10. Click **Apply**.

Creating Auto-Reply Rules and Associating Them With Accounts:

Auto-reply rules allow you to determine whether you want to automatically reply to an incoming email using the specified set of documents and templates.

The process of creating auto-reply rules involves two tasks:

Creating Auto-Reply Rules, page 5-60

Associating Auto-Reply Rules With Email Accounts, page 5-61

Creating Auto-Reply Rules

Use the following steps to create an auto-reply rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Reply.
The Create Auto-Reply Rule page appears.
4. In the Name field, type a name for the auto-reply rule you are creating.

5. Optionally, in the Description field, type a short description for the auto-reply rule.
6. If you want the auto-reply rule to apply to all incoming emails, click the All Emails box.

Note: If you check the All Emails box, you do not need to provide conditions for the auto-reply rule. If the All Emails box is checked, any conditions for that rule will be ignored.

7. If you want your auto-reply rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-reply rule should be applied to an incoming email.
 1. From the list in the Key field, select a key for the auto-reply rule you are creating.
 2. From the list in the Operator field, select an operator for the auto-reply rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the auto-reply rule you are creating.
8. In the Action area, use the Category, Document, and Insert/Attach fields to specify the category and document you want to include, as well as how the document should be included with the reply.
 1. From the list in the Category field, select the MES category that contains the document you want to use.
 2. From the list in the Document field, select the document you want to use for your auto-reply.
 3. From the list in the Insert/Attach field, select whether you want to insert the document into the body of the reply, or attach it to the reply.

Note: The order in which you select your documents will be the order in which they are inserted into or attached to the response.

9. Click **Create**.

The Email Processing Rules page refreshes and the new auto-reply rule is displayed in the summary view table.

Associating Auto-Reply Rules With Accounts

Use the following steps to associate an auto-reply rule with an email account.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Accounts > Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the auto-reply rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Reply.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-reply rule you want to associate to the selected email account.
7. Click **Apply**.
The selected auto-reply rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-reply rule by clicking the hyperlinked name in the Rule Name column.
A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-reply rule is associated to the email account.
8. If you are associating additional auto-reply rules to an email account, use the Priority list to determine a hierarchy among the auto-reply rules.
Note: Rules cannot share the same priority level. In general, you should assign a high priority to more specific rules and a low priority to generic rules.
9. Ensure the Enabled box is checked for each auto-reply rule you want to use.
10. Click **Apply**.

Creating Document Retrieval Rules and Associating Them With Accounts:

The Document Retrieval processing rule enables administrators to select a method for retrieving documents from the Knowledge Base. They can choose to use the old keyword matching method, or the new MES Category Mapping method.

This new method maps incoming email to a specific category in Marketing Encyclopedia System (MES). Different categories can be selected for different conditions defined using

the rules engine. Documents in the category selected are displayed in the descending order of their usage.

The process of creating routes involves two tasks:

Creating Document Retrieval Rules, page 5-63

Associating Document Retrieval Rules With Email Accounts, page 5-64

Creating Document Retrieval Rules

Use the following steps to create a document retrieval rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.
The Create Document Retrieval Rule page appears.
4. In the Name field, type a name for the document retrieval rule you are creating.
5. Optionally, in the Description field, type a short description for the document retrieval rule.
6. From the Retrieval Method list, select the method by which you want to retrieve documents and click **Go**.
7. If you want the document retrieval rule to apply to all incoming emails, click the All Emails box.
Note: If you check the All Emails box, you do not need to provide conditions for the document retrieval rule. If the All Emails box is checked, any conditions for that rule will be ignored.
8. If you want your document retrieval rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the document retrieval rule should be applied to an incoming email.

1. From the list in the Key field, select a key for the document retrieval rule you are creating.
 2. From the list in the Operator field, select an operator for the document retrieval rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the document retrieval rule you are creating.
9. If you selected **Keyword Matching** as your retrieval method:
1. Select the repository you want to search.
You can select to search MES, Knowledge Management, or both.
 2. Select to search all categories within the chosen repository, or search for and select individual categories within the chosen repository.

Note: The All Categories option refers ONLY to all MES categories. It does not apply to categories in the Knowledge Management system.

10. If you selected **MES Category Mapping** as your retrieval method:
1. Search for and select the appropriate MES Category.
 2. Click **Apply**.
11. Click **Create**.

The Email Processing Rules page refreshes and the new document retrieval rule is displayed in the summary view table.

Associating Document Retrieval Rules With Accounts

Use the following steps to associate a document retrieval rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule. When using keyword matching rules, intent processing must be enabled for the account to which you are associating the rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.

3. From the list in the Email Account field, select the email account to which you want to assign the document retrieval rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

4. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.

The Account Association page appears.

5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the document retrieval rule you want to associate to the selected email account.
7. Click **Apply**.

The selected document retrieval rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the document retrieval rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second document retrieval rule is associated to the email account.

8. If you are associating additional document retrieval rules to an email account, use the Priority list to determine a hierarchy among the document retrieval rules.

Note: Rules cannot share the same priority level.

9. Ensure the Enabled box is checked for each document retrieval rule you want to use.
10. Click **Apply**.

Creating Routing Rules and Associating Them With Accounts:

Oracle Email Center automatically routes incoming emails to an agent group based on user-defined rules. There are two types of routes:

- **Static** - The rules for static routes are constructed using key value pairs extracted from the properties and content of the email.
- **Dynamic** - Dynamic Routes allow the use of PL/SQL procedures to access any data in the database and use as the basis for routing.

Administrators can define any number of static or dynamic routing rules and these routing rules are executed in priority order once the routing rule is assigned to an email account. Emails are routed to an agent group and not to the individual agent. An agent (resource) group is only valid if it contains at least one resource, which is assigned to an email account and has one of the Email Center Agent or Email Center Supervisor role assigned to it. If none of the routing rules are satisfied, the email is routed to all agents belonging to that account.

One or more routing rules can be associated to an email account, for incoming emails addressed to that account to be routed to the respective destination group of agents.

The Account Association page enables routing rules to be associated with an email account. This Account Association must be enabled in order for that routing rule to be executed. Routing rules that are not enabled will not be executed. If you want to route an email back to the original agent, you can select **Original Agent**, from the list of resource groups in the Primary Destinations field.

Routing rule priorities perform the same function as classification priorities; they are used to determine the order in which the routing rules are executed. The priority of each routing rule is unique; the priority can be changed; and, in doing so, will affect the values of other routing rule priorities. By default, newly defined routing rules are assigned the lowest priority among existing routes.

The routing engine evaluates routes in order of priority, starting with 1. The first route, whose rules are satisfied, will determine the routing destination. At the end of the email processing, an email will have ONE and ONLY ONE destination (resource) group assigned to it. The routing engine will check the validity of a destination group before routing an email to that group; if the group does not contain a valid set of resources, the email is routed to the default destination group. If the default destination group does not contain a valid set of resources, the email is routed to all agents assigned to the email account. If the routes have been setup, but none are valid for the email being processed, the emails are routed to all agents assigned to the email account. If there are no routes setup, emails are routed to all agents assigned to the email account.

The process of creating routes involves two tasks:

Creating Routing Rules, page 5-66

Associating Routing Rules With Accounts, page 5-68

Creating Routing Rules

Use the following steps to create a route.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

None

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Routing.

The Create Route page appears.

4. In the Name field, type the name of the route you are creating.
5. In the Description field, type a short description for the route you are creating.
6. From the Route Type list, select the route type, and click **Go**.
7. If you selected **Static**, the Create Route page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
 1. If you are going to utilize multiple rules, from the Rule Chaining list, select how you want those rules joined together.

For any route, all rules can be chained using either AND or OR, but not both.
 2. From the list in the Key field, select a key for the routing rule you are creating.
 3. From the list in the Operator field, select an operator for the routing rule you are creating.
 4. From the list in the Value field, search for and select, or type a value for the routing rule you are creating.
 5. If you want the routing rule to apply to all emails, select the All Emails option.
8. If you selected **Dynamic**, the Create Route page refreshes to display a procedure area where you can define the procedure name and variables you want to use.

Note: When creating dynamic routing rules, please follow the TIP guidelines on what kind of procedures can be used. The procedure will fail if the procedure does not follow the criteria specified in the TIP.

1. In the Procedure Name field, type a name for the procedure you will use for your dynamic route.
 2. In the list in the OUT Parameter Type field, select the data type you want to use for your route.
 3. From the list in the Operator field, select an operator for the routing rule you are creating.
 4. From the list in the Value field, search for and select, or type a value for the routing rule you are creating.
9. Click **Create**.

The routing rule is created and appears in the summary view table under Routing on the Email Processing Rules page.

To update an existing route, click the route name hyperlink in the Email Processing Rules by Type column. The Update Route page appears, allowing you to update the description, the static rule keys, operators and values, or the procedure details.

To remove a route, click the delete icon (trash can) in the Add/Delete column for the routing rule you want to remove.

Associating Routing Rules With Accounts

Use the steps below to associate a route with an email account.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

You must have at least one resource group, that contains a resource (agent) who has been assigned to the email account and has one of the Email Center roles assigned, in order to use that resource group when routing an email.

Steps

1. Click the **Administration** subtab.
2. From the side panel (under Accounts), click **Processing Rules**.
The Assign Email Processing Rules page appears.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Routing.
The Account Associations page appears.
4. From the Email Account field, select the email account to which you want to associate the routing rule, and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account.
The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
5. From the list in the Name column, select the routing rule you want to associate to the selected email account.
6. From the list of resource groups in the Primary Destination field, select the group to which you want to route email.
Note: If you want to route the email back to the original agent, select **Original Agent**, from the list.
7. From the list or resource groups in the Default Destination field, select the group to which you want to route the email.
Note: The routing engine will check the validity of a Destination group before routing an email to that group; if the group does not contain a valid set of resources, the email is routed to the Default Destination Group. If the Default Destination Group does not contain a valid set of resources, the email is routed to all agents assigned to the email account.

Note: You can select **All Groups** if you want to route the message to all groups.

8. Click the Enabled box to enable the rule.
9. Click **Apply**.

The selected routing rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the routing rule by clicking the hyperlinked name in the Name column.

10. Repeat steps 5-9 to associate another route with the same email account <optional>.

To remove a route account association, click the appropriate box in the Select column, and click **Delete**. Click **Apply** to save the changes.

Rules Checkpoint: Verification

At this point a set of rules for email processing purposes should have been created for Email Center. Complete the following steps prior to performing the Business Data Module steps, in order to confirm that the Rules steps were successful.

1. Send one or more emails to each account matching the classification, auto-delete, auto-redirect, auto-reply, auto-acknowledge, and routing rules.
2. Log in as Email Center Agents belonging to different routing groups.
3. Confirm the following:
 - Agents can view all appropriate classifications.
 - Email counts are consistent with processing rules for each agent.
 - Inbound emails are routed to the correct classifications.
 - Emails you want automatically deleted (out of office notifications, etc.) are moved to the deleted folder according to your auto-delete rules.
 - Emails you want automatically redirected to another account are redirected according to your auto-redirect rules.
 - Automatic replies are generated for appropriate emails according to your auto-reply rules.
4. Verify that the sending email account receives the correct auto-acknowledgement.

Configuring Business Data

This section covers the steps required to perform the following:

- Creating and Configuring Intents, page 5-70
- Creating Categories and Hierarchies in MES, page 5-75
- Creating Documents, page 5-76
- Creating Queries, page 5-87
- Creating Custom Tags, page 5-89

Creating and Configuring Intents:

To enable the Email Center intent engine, you must create intents. The recommended way to do this is to send sample email messages and sample responses to the intent account. However, you can view, transfer, and delete intents using the Email Center Self Service Administration Console intent functionality.

Oracle recommends that an intent be created by sending multiple sample question and sample response emails to the "intent" account and only using the SSA "Intent" pages to remove an undesirable keyword.

Follow the guidelines listed below for defining intents and sample question and response emails:

- The intent name can be up to 50 characters long. It can consist of multiple words separated by a blank space.
- Intents should be mutually exclusive and should encompass the complete spectrum of questions that an organization expects to receive.

For example, a hardware company would have the following intents: Accessories, Service, Product Information, Installation whereas a medical company will have very different intents, e.g. claims, insurance, and doctors.

The following tasks are involved in the intent creation process:

- Creating Intents, page 5-70
- Verifying Intents, page 5-71
- Updating Intents, page 5-72
- Updating Keywords, page 5-73
- Removing Keywords, page 5-73
- Setting Intent Options, page 5-74

Creating Intents

Intent creation tips:

Think about the key words that you want to be associated with the Intent:

- Consider the variations on these words/phrases that customers may use.
- Consider the words or phrases that distinguishes one intent from another.
- Avoid including signature files in the sample question and response emails as the contents will be processed and Keywords that are irrelevant to the Intent may be generated.
- Do not "forward" sample emails and sample responses to the Intent account.
- Avoid Company names, logos, acronyms, etc. in the sample question and response emails.
- Do not include Greetings (e.g. Dear Sir) and Signatures (e.g. Best Regards, Joe Smith) in the sample question and response emails.
- Do not include specific codes or numbers, for example: product codes, sizes, telephone numbers, order numbers unless they uniquely identify an intent.

- Send multiple versions of the sample question and response emails repeating the important keywords and phrases. This will enable the system to increase the scores of the keywords.

Use the steps below to create intents.

Note: We recommend that multiple sample question emails (type <Q>) and multiple sample response emails (type <R>) should be sent for each Intent.

Prerequisite

An "intent" email account should already exist.

Steps

1. Identify a list of Intents.
2. Identify a list of commonly asked questions by subject area and prepare into sample question email messages.

For example:

To: intent@domain.com

Enter data in the subject line. The Subject of the email should conform to the following format: <Intent name><email account><Q>

(e.g., <Water Heating Service><support@emailcenter.com><Q>).

Note: The letter "Q" must be represented in upper case.

3. Identify a list of typical responses to these commonly asked questions and prepare into sample response email messages.

For example:

To: intent@domain.com

Enter data in the subject line. The Subject of the email should conform to the following format: <Intent name><email account><R>

(e.g., <Water Heating Service><support@emailcenter.com><R>)

Note: The letter "R" must be represented in upper case.

Verifying Intents

Use the steps below to verify the creation of your intents.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Intents**.
3. From the list in the Email Account field, select the email account to which you sent the intent.
4. In the Keyword column, click the keyword icon (eyeglasses) to view the list of keywords has been generated.

Updating Intents

You can update the name of an intent or update the email account associations of an intent. You update the account associations of an intent by transferring an intent from one email account to another email account. However, if you want the same intent across multiple accounts, you must send the intent email to each account.

Use this procedure to update intents.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents**.
The Intents page appears.
3. From the list in the Email Account field, select the email account for which you want to modify intents and click **Go**.
The Intents page refreshes to display the existing intents that are associated with the selected email account.
4. In the Name column, click the intent name hyperlink of the intent you want to update.
The Update Intent page appears.
5. If you want to update the name of the intent, in the Name field, type the new name for the intent.
6. If you want to update the email account association for the intent, from the Email Account list, select the email account to which you want to transfer the intent.

Note: Only email accounts with the same language are displayed in the drop-down list.

7. If you want to save your work and update the intent, click **Update**.
8. If you do not want to save your work and want to reset all the field values to the last saved values, click **Restore**.

Updating Keywords

The Email Center Self Service Administration console provides the ability to view and remove the keywords (type and score) associated with an intent. If you want to manipulate the results of the Intent Processing by adding keywords or changing the score of existing keywords, you should send additional sample Question <Q> and Response <R> email messages to the Intent account.

With every additional email processed, Email Center recalculates the scores within intents so that the keywords in that intent get re-organized according to their importance.

The scores of the existing keywords that appear again in additional sample emails are recalculated and are likely to increase with each occurrence or email. The score of keywords that exist for more than one Intent will be reduced. The total of keyword scores for an intent is 1, so as some scores are increased others will decrease and vice versa.

Removing Keywords

Use this procedure to remove keywords for an intent.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents**.
The Intents page appears.
3. From the list in the Email Account field, select the email account containing the intent from which you want to remove keywords and click **Go**.
The Intents page refreshes to display the existing intents that are associated with the selected email account.
4. In the Keyword column, click the keywords icon (glasses).
The Keywords page appears, displaying a list of all the keywords for the selected email account and intent.
5. In the Select column, select the box(es) for the keyword(s) you want to delete.
6. If you want to delete all of the intents, click the **Select All** hyperlink.

7. If you want to deselect the selected boxes, do one of the following.

- Click **Restore**
- Click the **Select None** hyperlink

Note: After you click **Delete** to delete the selected keywords, you can not restore the keywords by clicking **Restore**.

8. Click **Delete**.

The selected keywords are removed from the intent.

Setting Intent Options

You can set the number of intents with pre-fetched responses (the number of intents for which suggested responses will be fetched as part of the email processing) and enable or disable the use of Oracle Text in analyzing the content of incoming email messages sent to your email accounts. If you do not wish to have the Email Center intent processing performed on the incoming email messages for a particular email account, you can disable the intent analysis processing for that email account.

Note: By default, intent processing is disabled for all email accounts.

Use this procedure to set intent processing options.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents > Options**.
The Options page appears.
3. If you want to set the number of intents with pre-fetched responses, from the list in the Number of Intents with pre-fetched responses field, select a number between 1 and 10. Oracle recommends that you start with three.
4. If you want to enable intent processing for an email account, do one of the following.
 1. From the list in the Disabled Email Accounts field, double click to select the account(s) that you want to enable.
 2. From the Disabled Email Accounts list, select the account(s) that you want to enable and then click **Move**.

Note: You can select multiple account by holding down the Shift key or the Ctrl key as you click each account.

5. If you want to enable intent processing for all disabled email accounts, click **Move All**.
6. If you want to disable intent processing for an email account, from the Enabled Email Accounts list, select the account(s) that you want to disable and then click **Remove**.

Note: You can select multiple account by holding down the Shift key or the Ctrl key as you click each account.

7. If you want to disable intent processing for all enabled email accounts, click **Remove All**.
8. Click **Apply**.

Creating Categories and Hierarchies in MES:

Oracle Email Center (Email Center) uses the Marketing Encyclopedia System (MES) as its document repository. These documents are organized into categories for which a hierarchy can be defined.

MES provides you with the capability to organize documents into various categories (or folders). The MES repository is shared by all CRM applications and hence may contain documents not pertaining to Email Center.

Email templates or style sheets provided to an agent while composing new emails must be stored in MES. You can use these processes to create the categories under which you want to store these templates and then create a hierarchy among these categories.

This process involves the following tasks:

Creating Categories in MES, page 5-75

Defining a Hierarchy Among the Categories, page 5-76

Creating Categories in MES

Use the steps below to add new MES categories.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the Knowledge Base subtab. If you are logging in with the Email Center

Supervisor responsibility, click the Supervisor tab then click the Knowledge Base subtab.

2. From the side panel, click **Document > Categories**.
The Category Manager page appears.
3. If no blank rows are available, click **Add Row(s)** and, when prompted, type the number of new rows you want to add and click **OK**.
4. In the provided fields, type the name of the new category, a description of it, and select its parent category.
5. Click **Update**.

Guidelines

Read the content of the latest Oracle Email Center About Doc for important information about new features, post installation steps and other changes introduced with the release.

Defining a Hierarchy Among the Categories

Use the steps below to create a hierarchy of MES categories.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Categories**.
The Category Manager page appears, displaying a list of categories.
3. In the Category Name column find the category that you want to become the sub-category.
4. From the list in the Parent Category column for that row, select the desired parent category.
5. Click **Update**.

Creating Documents:

MES stores documents of any file type. Thus, documents stored in MES can be created using any third party software or Email Center's Template Editor. Through the SSA

Console Template Editor, you can only create HTML type documents, although the content may be in HTML or plain text.

Any document, regardless of its file type can be attached to an outbound email. However an agent will only be able to insert the content of HTML or text file type documents into the body of an outbound email.

When composing a new message or replying to customer email, the Email Center agent has the option to use a Plain Text editor or a Rich Text editor. The latter provides the ability to change font, size, color and format of the text and insert images into the response. Hence, if the response document is an HTML document inserted into the body of the email contains embedded images (for logo etc.) then the original format of the response will only be retained if the agent is using the Rich Text editor.

Email Center agents can also manually browse through the MES categories or search for a specific document using the Knowledge Base tab.

Merge Fields

The use of merge fields in a document enables its content to be dynamic. Email Center recognizes dynamic merge fields only in HTML or text file type documents. You can create highly personalized response documents through the use of merge fields. To include merge fields in a document, they must be enclosed within a special set of tags.

- For a required merge field: ((* *))
- For an optional merge field: ((? ?))

In the following example:

- Dear ((*CP_TITLE*)) ((?CP_FIRST_NAME?)) ((*CP_LAST_NAME*))

At the time an agent selects a document either for inserting or attaching into outbound email, values for merge fields CP_TITLE and CP_LAST_NAME will be required, whereas a value for CP_FIRST_NAME will be optional.

Email Center supports three types of merge fields:

1. Standard Merge Fields - These are pre-defined in Email Center. Standard merge fields are automatically populated with customer, email account and message information. These merge fields can be inserted directly into a response document or template and do not require a query for extracting the data. These merge fields can also be used as bind variables in a SQL query.

Following is the complete list of Standard Merge fields provided by Oracle Email Center for creating dynamic documents:

Customer Data Available from Customer Detail Page

Code	Description	Note
CP_LAST_NAME	Customer Last Name	PERSON_LAST_NAME from HZ_PARTIES table
CP_FIRST_NAME	Customer First Name	PERSON_FIRST_NAME from HZ_PARTIES table
CP_MIDDLE_NAME	Customer Middle Name	PERSON_MIDDLE_NAME from HZ_PARTIES table

Code	Description	Note
CP_PREFERRED_NAME	Customer Preferred Name	KNOWN_AS from HZ_PARTIES table
CP_TITLE	Customer Title	PERSON_TITLE from HZ_PARTIES table
CP_2ND_TITLE	Customer Second Title	PERSON_ACADEMIC_TITLE from HZ_PARTIES table
CP_SUFFIX	Customer Suffix	PERSON_NAME_SUFFIX from HZ_PARTIES table
CP_EMAIL_ADDRESS	Customer Email Address	EMAIL_ADDRESS from HZ_PARTIES table
CP_PRIMARY_EMAIL	Customer Primary Email Address	Data from HZ_PARTIES table
CP_PRIMARY_PHONE	Customer Primary Phone Number	Data from HZ_PARTIES table
CP_HOME_PHONE	Customer Home Phone Number	Data from HZ_PARTIES table
CP_WORK_PHONE	Customer Office Phone Number	Data from HZ_PARTIES table
CP_ADDRESS	Customer Address	Data from HZ_PARTIES table
CP_ADDR_LINE1	Customer Address Line 1	ADDRESS1 from HZ_PARTIES table
CP_ADDR_LINE2	Customer Address Line 2	ADDRESS2 from HZ_PARTIES table
CP_CITY	Customer Address City	CITY from HZ_PARTIES table
CP_STATE	Customer Address State	STATE from HZ_PARTIES table
CP_PROVINCE	Customer Address Province	PROVINCE from HZ_PARTIES table
CP_POSTAL_CODE	Customer Address Postal Code	POSTAL_CODE from HZ_PARTIES table
CP_COUNTY	Customer Address County	COUNTY from HZ_PARTIES table
CP_COUNTRY	Customer Address Country	COUNTRY from HZ_PARTIES table
CP_ORGANIZATION	Customer Organization	Data from HZ_PARTIES table

Code	Description	Note
CP_PARTY_ID	Party ID for the Customer	PARTY_ID from HZ_PARTIES table
CP_PARTY_NUMBER	Party Number for the Customer	PARTY_NUMBER from HZ_PARTIES table

Contact Data Available from Contact Detail Page

Code	Description	Note
CON_LAST_NAME	Contact Last Name	Contact Data from HZ_PART IES table
CON_FIRST_NAME	Contact First Name	
CON_MIDDLE_NAME	Contact Middle Name	
CON_PREFERRED_NAME	Contact Preferred Name	
CON_TITLE	Contact Title	
CON_2ND_TITLE	Contact Second Title	
CON_SUFFIX	Contact Suffix	
CON_EMAIL_ADDRESS	Contact Email Address	
CON_PRIMARY_EMAIL	Contact Primary Email Address	
CON_PRIMARY_PHONE	Contact Primary Phone Number	
CON_HOME_PHONE	Contact Home Phone Number	
CON_WORK_PHONE	Contact Office Phone Number	
CON_ADDRESS	Contact Address	
CON_ADDR_LINE1	Contact Address Line 1	
CON_ADDR_LINE2	Contact Address Line 2	
CON_CITY	Contact Address City	
CON_STATE	Contact Address State	
CON_PROVINCE	Contact Address Province	
CON_POSTAL_CODE	Contact Address Postal Code	
CON_COUNTY	Contact Address County	
CON_COUNTRY	Contact Address Country	
CON_ORGANIZATION	Contact Organization	
CON_PARTY_ID	Party ID for the Contact	
CON_PARTY_NUMBER	Party Number for the Contact	

Note: For standard merge field values containing customer and contact data to be automatically populated, the agent must ensure the Customer

bin is populated (e.g. the customer lookup for an incoming email has been successful or the agent manually searches for and selects a customer), prior to inserting a document or template.

Agent Data Available from JTF

Code	Description	Note
AD_USER_NAME	Agent User Name	This is the FND_USER.USER_NAME (e.g. MRABATIN)
AD_USER_FULL_NAME	Agent Full Name	Concatenation of Agent's First Name and Last Name

Miscellaneous Data

Code	Description	Note
MD_CURR_DATE	Current Date	Current System Date
MD_CURR_TIME	Current Time	Current System Time

Current Account Data

Code	Description
ACCT_REPLY_TO	Current Account Reply To Address
ACCT_FROM_NAME	Current Account From Name
ACCT_FROM_ADDRESS	Current Account From Email Address
ACCT_SIG	Current Account Signature

Current Inbound Message Data

Code	Description
INB_EMAIL_ADDRESS	Inbound Message From Address
INB_SUBJECT	Inbound Message Subject
INB_TO	Inbound Message To Address List
INB_CC	Inbound Message Carbon Copy Address List
INB_SENT_DATE	Inbound Message Sent Date
INB_CLASSIFICATION	Inbound message classification

Auto Acknowledgement Merge Field Data

Code	Description
ACK_SENDER_NAME	Auto Acknowledgment - Full Name of the Sender
ACK_SUBJECT	Auto Acknowledgment - Subject of the Inbound Email
ACK_RECEIVED_DATE	Auto Acknowledgment - Email received Date
ACK_ACCT_EMAIL_ADDRESS	Auto Acknowledgment - Account email address
ACK_ACCT_FROM_NAME	Auto Acknowledgment - Full Name of the Account

1. Custom Merge Fields - These merge fields are defined by the administrator. A value for each custom merge field must be manually entered by the agent before inserting or attaching the associated document into an outbound email. At the time when a document is inserted or attached the custom merge field placeholder(s) will be dynamically replaced with the data entered by the agent for each one respectively.
2. SQL Merge Fields - These merge fields are defined by the administrator. SQL merge fields are automatically populated with information resulting from the execution of a document's associated SQL Query. All SQL merge fields used in a document should correspond to column aliases of the Select statement portion of the document's associated SQL query. If bind variables are present in the Where clause of the SQL statement, the agent will be asked to enter valid values for them prior to executing the SQL query and, subsequently, auto-populating the document's SQL merge fields.

Bind variables do not require the use of merge field tags ((* *)) or ((? ?)).

For example, a document may contain? the following two SQL merge fields: ((*Product)) and ((*Date*)):

Dear customer,

Thank you for your interest in ((*PRODUCT*)). This product will be released on ((*DATE*)).

The query to populate these fields would have the following SELECT statement:

```
SELECT
PRODUCT_NAME "((*PRODUCT*))",
RELEASE_DATE "((*DATE*))"
FROM ...
WHERE ...
```

Note: Ensure that the SQL query is written such that a default value is returned if the query returns no data, otherwise the template/response document cannot be used.

Note: The alias for the column names in the Select clause, should match the name of the merge fields in the document. Do not end the query with a semicolon (;) or forward slash (/).

For the SQL merge fields to be auto-populated after the agent inserts or attaches the document into an outbound email, Email Center requires the selected document to be physically associated with the SQL Query.

This association occurs automatically when the dynamic document is created and published to MES via Email Center's Template Editor. If the dynamic document is not created using Email Center Template Editor, manual association of the document with SQL Query is required.

Note: If you enter a SQL Merge Field in a document, but fail to associate the document with a SQL query, Email Center assumes the merge field is a custom merge field and expects the agent to manually enter a value.

Auto-Acknowledge Templates

To utilize the Auto-Acknowledge features Oracle Email Center provides, you must first create auto-acknowledge templates in MES. These templates should be created as plain text documents or HTML documents, and stored in MES. A small number of "Auto Acknowledge" merge fields should be made available to be used in auto-acknowledge templates. These merge fields relate to the information available in the incoming email header:

Merge Field Name	Description	Example
ACK_FROM_NAME	From Name	e.g. From field contains: "Joe. Smith"joe.smith@oracle.com" From Name = Joe Smith. If there is no name, this will default to "Customer"
ACK_RECEIVED_DATE	Incoming email received date	
ACK_REPLY_TO	Master Email Account Reply To value	
ACK_SENDER_NAME	Master Email Account Sender Name value	
ACK_SUBJECT	Incoming email subject	

You can perform the following tasks:

Creating and Publishing Documents, page 5-84

Uploading and Publishing Documents, page 5-85

Verifying the Document Was Successfully Published, page 5-86

Deleting Published Documents, page 5-86

Creating and Publishing Documents

Use the steps below to create and publish a document for MES by using the template editor.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

If you are going to use a custom merge field, then you must have first created and named that custom merge field on the Create Query page.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Document > Editor**.
The Create Document page appears.
3. In the Title field, type a name for your document.
4. In the Description field, provide a short description of the document.
5. In the Category field, search for and select the appropriate MES category in which you want to create your document.
6. In the Query Name field, you can search for and associate a query to the document.
7. Use the provided fields to select the type of merge field you want to use:
 1. If you want to use a standard merge field, from the list in the Standard Merge Field field, select the option you want to use, and click **Insert**.
 2. If you want to use a custom merge field, type the name of the custom merge field in the Custom Merge Field field, and click **Insert**.
8. Click the hypertext link above the Template Body field to switch from plain text mode to rich text mode.
Rich text mode allows you to format the font of the email, and include an image or hyperlink in the email.
9. In the Template Body field, type the desired document content. Optionally, you can include the following in the document's content:
 - One or more standard merge fields by selecting a value from the Standard Merge Field list and clicking **Insert**.

- One or more custom merge fields by entering a value in the Custom Merge Field text field and clicking **Insert**.

10. To preview the document before you publish it, click **Preview**.

11. Click **Publish**.

A conformation message appears, stating that you successfully published the document.

Uploading and Publishing Documents

Use the steps below to import and publish a document for MES.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. On the side panel, click **Document > Publish**.
The Publish Document page appears.
3. In the Title field, type a title for the document you are going to upload.
4. In the Description field, provide a short description of the document.
5. In the Category field, search for and select the appropriate MES category for your document.
6. Click **Upload File**.
The Upload File browse box appears.
7. In the Upload File browse box, click **Browse**, search for and select the file you want to upload.
8. Click **Upload**.
The Publish Document page refreshes and the selected file appears in the Files field.
9. Click **Publish**.
A confirmation message is displayed, stating that the new document has been published.

Note: If the documents loaded into MES will be used as suggested responses, a concurrent process needs to be run in order to rebuild the Oracle Text index for MES. Log in as the Email Center Concurrent Program Administrator user in the forms application, and submit a request to run the Rebuild Help Search Index concurrent process (refer to the Business Data Checkpoint section).

To publish another document you must start by clicking Publish hyperlink in the side panel again. Do not try to use (re-cycle) data entered for a previous file.

Verifying a Document Was Successfully Published

MES provides a Category page for displaying categories and the documents published under each category. You can verify that a document has been successfully published (via Publish option or via Template Editor) by navigating to the category under which the document was published and viewing the document.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. Click the **Knowledge Base** tab.
2. From the side panel (under **Document**), click **Browse**.
The Browse Documents page appears.
3. In the View column, click the View icon for the desired MES category.
The Browse Documents page refreshes to display all the documents in the selected MES Category.
4. In the Title column, click the title of the desired document and the contents of the selected document appear in a separate pop-up window.

Guidelines

Read the content of the latest Oracle Email Center About Document for important information about new features, post installation steps and other changes introduced with the release.

Deleting Published Documents

Use the steps below to remove a MES document you published.

Note: You can only delete documents that you published. You cannot delete documents that have been published by other user names.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the Knowledge Base subtab. If you are logging in with the Email Center Supervisor responsibility, click the Supervisor tab then click the Knowledge Base subtab.
2. Search or browse for the document you want to remove by clicking **Document > Search** or clicking **Document > Browse** from the side panel.
3. In the Select column of the table, select the box for the document you want to remove.
4. Click **Remove**.

The page refreshes to display a confirmation message stating that the selected document was deleted.

Guidelines

Read the content of the latest Oracle Email Center About Document for important information about new features, post installation steps and other changes introduced with the release.

Creating Queries:

Use this procedure to create a query.

Prerequisites

You must be assigned the JTF_FM_ADMIN role to create queries.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the Side panel, click **Query**.
The Queries page appears.
3. From the side panel, click **Create**.
The Create Query page appears.
4. In the Query Title field, type a unique name for the query that you want to create.
5. In the Query Description field, type any free-form text that you want to use to describe the query that you are creating.
6. In the Query String field, type the SELECT statement for the query.

Note: The alias for each column used in the SELECT statement must match the merge field name and must be enclosed within the valid merge field delimiters. To assist in this process, Email Center allows you to insert SQL merge fields. Do not end the query with a semicolon (;) or slash (/).

For example, if the document had following merge fields:

Dear ((*FIRST_NAME*)) ((*LAST_NAME*)),

Thank you for your interest in ((*PRODUCT*)). This product will be released on ((*DATE*)).

The query to populate these fields would have the following SELECT statement:

```
SELECT CUSTOMER_FIRST_NAME "((*FIRST_NAME*))",  
CUSTOMER_LAST_NAME "((*LAST_NAME*)) ",  
PRODUCT_NAME "((*PRODUCT*)) ",  
RELEASE_DATE "((*DATE*)) "  
FROM ...  
WHERE ...
```

Note: Ensure that the SQL query is written such that a default value is returned if the query returns no data, otherwise the template/response document cannot be used.

7. In the SQL Merge Field field, type the name of the merge field and click **Insert**.
An alias name for the column that matches the merge field is inserted at the end of the text in the Query String Editor.

Note: When typing a SQL merge field, you must use all capital letters. While no white spaces are allowed, you can use numerals and underscores (_).

Note: Since the functionality to insert merge fields cannot recognize the current cursor position in the Query String editor, the merge field always gets inserted at the end of the statement. Therefore, Oracle recommends that you insert the merge fields immediately after typing the corresponding column name.

When the user selects a document that includes SQL merge fields, he/she will be prompted to enter values for the bind variables entered in the WHERE clause unless the bind variable is a "standard" merge field itself. In which case the bind variable will be populated automatically. The SQL query will get executed using the value for the bind variable when the associated document is previewed, inserted or attached.

8. Click **Validate SQL**.

You will be prompted to enter a value for the bind variables used in the query.

9. Enter a random numeric or varchar value (depending on the data type of the corresponding column) for the bind variable, and click **Validate SQL**.

You receive a confirmation messages stating that the validation was successful and the prompt you created in the Query String field is added.

10. If you want to save your work and create the query, click **Create**.

11. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Creating Custom Tags:

A "tag" can be defined as a container of valuable information that can be passed between a vendor and a customer using email as the communication channel. The process of appending such system or customer related data to the outbound email and extracting from an incoming email is referred to as "tagging". The data extracted can then be used for classifying and routing an email or automatically performing a processing action based on the content of the "tag". The ability to tag emails enhances the integration of Oracle Email Center with other E-Business Suite applications, whereby a specified action can be performed based on the presence, absence or value of a specific tag. For example, the outbound email could contain a service request number, a lead ID or a marketing campaign ID based on whether the email was generated from - Oracle TeleService, Oracle TeleSales or Oracle Marketing applications.

Tags fall into two categories:

- System - System tags are seeded key value pairs, which are maintained and processed by the Email Center server processing engine. The following system tags are available:

- INTERACTION_ID - Interaction ID for the outbound email
- AGENT_ID - The Resource ID for the agent who is sending the email
- CUSTOMER_ID - The PARTY ID for the selected customer

The above data will be appended to every outbound email by default. Additionally, other business applications integrated with Email Center can pass a key-value pair relevant to their business using the tag listed below.

- BIZ_KEY_VAL - This is a variable key that enables business applications integrating with Email Center to pass values pertaining to their business. For

e.g., the TeleService application may want to append the Service Request number whereas the TeleSales application may want to append the Lead ID.

- Custom - Custom tags are defined by the administrator. These tags are not appended to the email by default but have to explicitly associated with each email account. The custom tags could be of the following types:
 - Fixed - These keys have a fixed value.
 - Query - These keys have a SQL call for retrieving the value at run-time.
 - Procedure - These keys have a valid PL/SQL procedure call that generates the value of the key at run time.

Once a custom tag is associated with an email account, every outbound email sent from that account will automatically include this tag.

Examples of custom tags:

- All outgoing emails sent from a particular account should be flagged as a Priority, so a fixed tag "PRIORITYMAIL" is created with a value of "Priority". When an email is sent from this account it will include this tag. When a customer responds, the tag will be extracted and the incoming email will be classified as a "Priority" email based on the value of the tag and presented accordingly to the agent.
- A special offer is included with every outgoing email. This offer is only valid for 10 days after the email is sent out. A query tag "TENDAYOFFER" is created with a value of "select trunc(sysdate) from dual". When an email is sent from this account the SQL query is executed and the resulting value included in the tag. When a customer responds, the tag is extracted and the incoming email routed to the appropriate group of agents depending on whether the reply is within the 10 days.
- The ID of the Customer associated with the email message is used to look up sales volume for last month. A procedure tag "SALESVOL" is created with a value of "LOOKUP_UP.SALES_VOLUME". When an email is sent from this account the procedure is executed and the resulting value included in the tag. When a customer responds, the tag is extracted and based on the tag value the email is classified. If the value is >10000 then classify as "Premier Customer", if >5000 and <10000 then "Gold Customer", otherwise "Silver Customer".

Email Center will create a tag for each outbound email comprising of the system tags and custom tags associated with that account and generate a unique encrypted ID. This unique encrypted ID is then enclosed within predefined tag markers and appended to the subject of the outgoing email as shown below:

- "Re: Please assist with my issue [REF: 1005218040]".

When a customer replies back, Email Center identifies the tag markers in the subject of the email and extracts the tag ID enclosed within. This tag ID is then decrypted and the corresponding key-value pairs made available to the processing engine for validating the processing rules.

Tag administration involves the following tasks:

- Creating Tags, page 5-91
- Associating Tags With Accounts, page 5-91
- Updating Tags, page 5-92
- Deleting Tags, page 5-93

Creating Tags

Use the steps below to create tags for Email Center.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

None

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Tag**.
The Tag Summary page appears.
3. Click **Create Tag**.
The Create Tag page appears.
4. Enter values for:
 - **Tag ID** - Any combination of alphanumeric characters a-z and A- Z, up to 26 characters in length.
 - **Tag Name** - Any combination of alphanumeric characters other than double quote ("), less than (<) and greater than (>), up to 50 characters in length.
 - **Type** - Select **Fixed**, **Procedure**, or **Query** from the list.
 - **Value** - The value depends on the type selected above.

For Fixed type tags any alphanumeric character up to 256 characters is allowed. For Procedure type tags a valid procedure name should be entered in the "package_name.procedure_name" format. For Query type tags, a valid query should be entered without a semi-colon (;) or a slash (/) at the end.
5. Click **Create**.

The Account Association page appears. Follow the steps in the Associating Tags With Accounts, page 5-91 topic to associate this new tag with various email accounts.

Associating Tags With Accounts

Use the steps below to associate tags with an email account.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

The tag you are deleting must not be associated with any email accounts, or processing rules.

Steps

1. Click the **Administration** subtab.
2. From the side panel (under **Accounts**), click **Tags**.
The Account Association page appears.
3. In the Email Account field, select the account name from the list and click **Go**.
All tags already associated with that account are displayed on the right side and all the remaining tags are displayed on the left.
4. Select a tag from the "Available Tags" list.
5. Click the "Move" (>) icon to associate the selected tag.
6. To associate all the available tags, click on the "Move All" (>>) icon.
7. To remove a tag - account association, select a tag from the "Associated Tags" list and click on "Remove" (<) icon.
8. To remove all tag - account associations click on "Remove All" (<<) icon.
9. Click **Apply** to save changes.

Updating Tags

Use the steps below to update tags.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

None

Steps

1. Click the **Administration** subtab.
2. From the side panel, click on **Tag**.
The Tag Summary page appears.
3. In the Name column, click the hyperlinked name of the tag you wish to update.

The tag details (ID, Name, Type, and Value fields) are displayed on Update Tag page.

4. Update the Name, Type or Value fields as necessary.
5. Click **Update** to save changes or **Restore** to undo the changes.

Deleting Tags

Use the steps below to delete tags.

Login

Email Center Self Service Administrator

Responsibility

Email Center Self Service Setup

Prerequisites

The Tag to be deleted should NOT be associated with any email accounts.

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Tag**.
The Tag Summary page appears.
3. Check the boxes corresponding to the tags you want to delete.

Note: If you realize you have clicked unwanted boxes, you can click **Restore** to uncheck all boxes. The Restore button does not rollback the delete operation. In other words the deleted tags cannot be undeleted by clicking **Restore**.

4. Click **Delete** to delete the selected tags.

Note: A custom tag can only be deleted if it is not associated with any email accounts.

Business Checkpoint: Verification

At this point the basic Email Center implementation and configuration should be complete.

Complete the following steps in order to confirm that the business data steps were successful.

Login

Forms Login URL

HTML Login URL

Responsibility

Email Center Concurrent Program Administrator

Email Center Agent Console

Email Center Message Component

Prerequisites

None

Steps:

1. Use the Forms login URL and select the Email Center Concurrent Program Administrator responsibility. Submit a request to run the Rebuild Help Search Index concurrent process:
 1. From the list of functions, double click **Email Center Concurrent Program Administrator**.
 2. Double click **Requests**.
 3. Double click **Run**.
The Submit a New Request box appears.
 4. Select the **Single Request** option.
 5. Click **OK**.
The Submit Request page appears.
 6. Click the drop-down list in the Name field.
 7. Select **Rebuild Help Search Index**.
The Parameters dialog box appears.
 8. Type your APPLSYS schema name and your APPS schema name in the provided fields and click **OK**.
 9. Click **Submit**.
2. Send one of the sample emails you used to create intents to one of the email accounts you defined.
3. Log in to the HTML Login URL as an Email Center agent (Email Center Agent Console responsibility) and fetch the email.
 1. Verify that the Intent and Suggested Responses relate to the email.
 2. Respond to the email using suggested response document.
 3. Compose a new email using a template stored in the Knowledge Base.
 4. Search for documents in the Knowledge Base and insert into the email.
 5. Send the email and confirm receipt.
 6. Confirm the following:
 - No emails in the OES Retry/Admin folders.
 - Suggested responses presented in Reply page.

- Customer details displayed in Customer bin (successful customer lookup using email address).
- Intents/Suggested Responses and confidence scores available.
- Merge fields populated or prompt for entry and successfully inserted into email.
- Able to insert/attach suggested response.
- Template shown in bin on Compose page.
- Merge fields populated.
- Categories, hierarchies and documents visible.
- Search for documents successful.
- Able to insert/attach document from Knowledge Base Tab.
- UWQ Inbound Email queues show correct counts.
- UWQ Acquired Email queue shows correct counts and email details.
- Auto acknowledgement email received.
- Outbound Emails contain tag reference in the subject.

Administration Tasks

This chapter covers the following topics:

- Email Center Introduction
- Email Center Custom Configuration
- Email Center Site Profile Options
- Email Center Default Configuration
- Email Center Outbox Processing Console
- Email Accounts
- Processing Rules
- Intents
- Tags
- Custom Dictionary
- Archive/Purge
- Documents
- Queries
- Resource Groups

Email Center Introduction

The Introduction subtab provides a brief overview of the Oracle Email Center Self Service Administration console, and introductory explanations for each subtab within the Self Service Setup console. As well, a Helpful Hints page in the Introduction subtab provides useful information about Oracle Email Center prerequisites, configuration, and profile options.

Email Center Custom Configuration

Use the Email Center Custom Configuration to view and modify your Email Center configuration.

Tasks

You can perform the following tasks:

- Managing Email Center Server Groups, page 6-2
- Managing Database Servers, page 6-4
- Managing Database Links, page 6-8
- Managing Email Servers, page 6-11

Managing Email Center Server Groups:

Topics include:

- Creating an Email Center Server Group, page 6-2
- Modifying an Email Center Server Group, page 6-3
- Deleting an Email Center Server Group, page 6-4

Related Topics:

- Managing Database Servers, page 6-4
- Managing Database Links, page 6-8
- Managing Email Servers, page 6-11

Creating an Email Center Server Group

You can create a new Email Center server group to contain your SMTP and IMAP processes, and OES database server.

Use this procedure to create a new Email Center server group.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Server Group**.
The Server Groups page appears.
3. Click **Create**.
The Create Server Group page appears.
4. In the Group Name field, type a unique name for the Email Center server group that you want to create.
5. In the Group Description field, type any free-form text that you want to use to describe the server group that you are creating.

6. If you want to save your work and create the server group, click **Create**.
7. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Related Topics:

- Modifying an Email Center Server Group, page 6-3
- Deleting an Email Center Server Group, page 6-4

Modifying an Email Center Server Group

You can customize and maintain the Email Center server group information that you have defined in your Email Center system. The Email Center server group is the server group that contains your SMTP and IMAP processes, and OES database server, and is used to associate the OES processes (IMAP and SMTP) and email accounts with the server group.

Use this procedure to update your Email Center server group information.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Server Group**.
The Server Groups page appears.
3. In the Group Name column, click the server group name hyperlink for the server group you want to update.
The Update Server Group page appears displaying the current information for the server group.
4. If you want to change the name of the existing Email Center server group, in the Group Name field, type the new name for the Email Center server group.
5. If you want to update the description of the existing Email Center server group, in the Group Description field, type the new text description for the server group that you are updating.
6. If you want to save your work and update the server group information, click **Update**.
7. If you do not want to save your work and want to reset all the field values to the last saved values, click **Cancel**.

Related Topics:

- [Creating an Email Center Server Group](#), page 6-2
- [Deleting an Email Center Server Group](#), page 6-4

Deleting an Email Center Server Group

You can delete an Email Center server group and would do so if you want to delete the existing server group and replace it with a new server group. However, you must create a new Email Center server group before using Email Center to process email.

Use this procedure to delete an Email Center server group.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Server Group**.
The Server Groups page appears.
3. If you want to individually select the Email Center server group(s) to delete, in the Select column, select the box(es) next to the server group(s) you want to delete.
4. If you want to delete all of the Email Center server groups, click the **Select All** hyperlink.
5. If you want to delete the selected server group(s), click **Delete**.
6. If you want to deselect the selected boxes, click the **Select None** hyperlink

Related Topics:

- [Creating an Email Center Server Group](#), page 6-2
- [Modifying an Email Center Server Group](#), page 6-3

Managing Database Servers:

Topics include:

- [Creating a Database Server](#), page 6-5
- [Modifying a Database Server](#), page 6-6
- [Deleting a Database Server](#), page 6-7

Related Topics:

- Managing Email Center Server Groups, page 6-2
- Managing Database Links, page 6-8
- Managing Email Servers, page 6-11

Creating a Database Server

You can define a new Oracle Email Server (OES) database instance in Email Center by creating an OES database server using the Email Center custom configuration functionality of Email Center. However, you must have installed and configured the new OES database for use with Email Center before you can use it with Email Center.

Use this procedure to create a new database server.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Database Server**.
The Database Servers page appears displaying a summary of information for the database server defined in your Email Center system.
3. Click **Create**.
The Create Database Server page appears.
4. In the Database Name field, type any unique name that you want to assign to the OES database instance. This name is only used in Email Center.
5. In the Host Name field, type the name of the machine on which the OES database is running.
6. In the Port field, type the SQL*Net port of the database.
7. In the Protocol field, type the protocol for network communication, for example, TCP.
8. In the Database SID field, type the standard system identifier for the database.
9. In the Database Global Name field, type the global name of the OES database. This value can be obtained from the GLOBAL_NAME table. It is typically a combination of the database SID and the domain name. This field is not case sensitive.
10. In the Database Description field, type any free-form text that you want to use to describe the database.

11. In the Node Name field, type the name of the node that you created during your OES configuration process. The word node refers to an OES database instance.
12. In the Admin User field, type the name of the administrator user. Typically this would be the Admin user (for example "admin") that was created during the OES installation and configuration process.
13. In the Admin Password field, type the password for the Admin user you have entered in the previous step. This is the password that was specified during your OES configuration process for the Admin user.
14. From the Group Server list, select the Email Center server group to which this server is to be added.
15. If you want to save your work and create the database server, click **Create**.
16. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Related Topics:

- [Modifying a Database Server, page 6-6](#)
- [Deleting a Database Server, page 6-7](#)

Modifying a Database Server

You can customize and maintain the database server information that you have defined in your Email Center system. The database server is the Oracle Email Server (OES) that you have installed and configured for use with Email Center.

Use this procedure to update your database server information.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Database Server**.
The Database Servers page appears displaying a summary of information for the database server defined in your Email Center system.
3. In the Database Name column, click the database server name hyperlink of the database server you want to update.
The Update Database Servers page appears displaying the current information for the database server.

4. If you want to change the name of the existing database server, in the Database Name field, type any unique name that you now want to assign to the OES database instance. This name is only used in Email Center.
5. If you want to update the host name of the existing database server, in the Host Name field, type the new name of the machine on which the OES database is running.
6. If you want to update the SQL*Net port information, in the Port field, type the SQL*Net port of the database.
7. If you want to update the protocol information, in the Protocol field, type the protocol for network communication, for example, TCP.
8. If you want to update the standard system identifier for the database, in the Database SID field, type the standard system identifier for the database.
9. If you want to update the database global name, in the Database Global Name field, type the global name of the OES database. This value can be obtained from the GLOBAL_NAME table. It is typically a combination of the database SID and the domain name. This field is not case sensitive.
10. If you want to update the description of the database, in the Database Description field, type any free-form text that you want to use to describe the database.
11. If you want to update the name of the node that you created during your OES configuration process, in the Node Name field, type the name of the node that you created during your OES configuration process. The word node refers to an OES database instance.
12. If you want to update the name of the administrator user, in the Admin User field, type the new name of the administrator user. Typically this would be the Admin user (for example "admin") that was created during the OES installation and configuration process.
13. If you want to update the administrator user's password, in the Admin Password field, type the new password for the Admin user. This password must match the password defined in OES for the Admin user.
14. If you want to update the Email Center server group to which this database server is to be added, from the Group Server list, select the Email Center server group to which this server is to be added.
15. If you want to save your work and update the database server information, click **Update**.
16. If you do not want to save your work and want to reset all the field values to the last saved values, click **Cancel**.

Related Topics:

- Creating a Database Server, page 6-5
- Deleting a Database Server, page 6-7

Deleting a Database Server

You can delete a database server and would do so if you want to delete the existing database server and replace it with a new database server. However, you must have installed and configured a new OES database for use with Email Center and

have created a new database server using the Email Center custom configuration functionality before using Email Center to process email.

Use this procedure to delete a database server.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Database Server**.
The Database Servers page appears displaying a summary of information for the database server defined in your Email Center system.
3. If you want to individually select the database server(s) to delete, in the Select column, select the box(es) next to the database server(s) you want to delete.
4. If you want to delete all of the database servers, click the **Select All** hyperlink.
5. If you want to delete the selected database server(s), click **Delete**.
6. If you want to deselect the selected boxes, click the **Select None** hyperlink

Related Topics:

- Creating a Database Server, page 6-5
- Modifying a Database Server, page 6-6

Managing Database Links:

Topics include:

- Creating a Database Link, page 6-8
- Deleting a Database Link, page 6-10

Related Topics:

- Managing Email Center Server Groups, page 6-2
- Managing Database Servers, page 6-4
- Managing Email Servers, page 6-11

Creating a Database Link

You can create a database link for your Email Center system using the Email Center custom configuration functionality of Email Center. Database links enable

information to be exchanged and synchronized between your Oracle Email Server (OES) and Application (Apps) databases.

Use this procedure to create the following three database links:

Apps database to OES database (to the OO user): This database link is established with high-level privileges (APPS user privileges) and is required to synchronize passwords and create email accounts.

OES database to Apps database: This link is used for server-side rule execution on the Oracle Email Server to exchange email metadata.

Apps database to OES database (to the ORAOFFICE user): This database link is used to exchange information between the Apps database and the OES database instances.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Database Link**.
The Database Links page appears displaying the database links defined in your Email Center system.
3. Click **Create**.
The Create Database Link page appears.
4. To create an Apps database to OES database (for the OO user) database link, do the following.
 1. From the Database Link list, select **Link to Email Server Database for OO user**.
 2. Click **Go**.
The Create Database Link page appears.
 3. From the Database Name list, select the name of the OES database.
 4. In the Password field, type the password that was specified during your OES configuration process for the OO user.
 5. If you want to save your work and create the database link, click **Create**.
 6. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.
5. To create an OES database to Apps database link, do the following.

1. From the Database Link list, select **Link to Application for APPS user**.
 2. Click **Go**.
The Create Database Link page appears.
 3. From the Database Name list, select the name of the OES database.
 4. In the Password field, type the password that was specified for the Apps user.
 5. In the Host Name field, type the name of the machine on which the Apps database is running.
 6. In the Port field, type the port number on which the database listener for the Apps database is running.
 7. In the Database SID field, type the standard system identifier for the Apps database, the Oracle SID.
 8. If you want to save your work and create the database link, click **Create**.
 9. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.
6. To create an Apps database to OES database (for the ORAOFFICE user) database link, do the following.
1. From the Database Link list, select **Link to Email Server Database for ORAOFFICE user**.
 2. Click **Go**.
The Create Database Link page appears.
 3. From the Database Name list, select the name of the OES database.
 4. In the Password field, type the password that was specified for the ORAOFFICE user.
 5. If you want to save your work and create the database link, click **Create**.
 6. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Related Topics:

- Deleting a Database Link, page 6-10

Deleting a Database Link

You can delete a database link and would do so if you want to delete an existing database link and replace it with a new database link. However, remember that all database links must exist and be operational before using Email Center to process email.

Use this procedure to delete a database link.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Database Link**.
The Database Links page appears displaying the database links defined in your Email Center system.
3. If you want to individually select the database link(s) to delete, in the Select column, select the box(es) next to the database link(s) you want to delete.
4. If you want to delete all of the database links, click the **Select All** hyperlink.
5. If you want to delete the selected database link(s), click **Delete**.
6. If you want to deselect the selected boxes, click the **Select None** hyperlink

Related Topics:

- [Creating a Database Link, page 6-8](#)

Managing Email Servers:

Topics include:

- [Creating an Email Server, page 6-11](#)
- [Modifying an Email Server, page 6-12](#)
- [Deleting an Email Server, page 6-14](#)

Related Topics:

- [Managing Email Center Server Groups, page 6-2](#)
- [Managing Database Servers, page 6-4](#)
- [Managing Database Links, page 6-8](#)

Creating an Email Server

You can define new Oracle Email Server (OES) SMTP and IMAP processes for your Email Center system by using the Email Center custom configuration functionality.

Use this procedure to create a new Oracle Email Server (OES) SMTP and IMAP process.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration >Email Server**.
The Email Servers page appears displaying summary information for the Oracle Email Server (OES) SMTP and IMAP processes defined in your Email Center system.
3. Click **Create**.
The Create Email Server page appears.
4. In the Server Name field, type the unique name that you want to assign to the SMTP or IMAP process.
5. In the DNS Name field type the unique machine identifier on the network.
6. In the IP Address field, type the IP address of the machine on which the process is running.
7. In the Port field, type the port number on which the SMTP or IMAP process is running. For example, an SMTP process would typically run on port 25 and an IMAP process would typically run on port 143.
8. From the RT Availability list, select the run time availability from the drop down list. This field enables internal tracking of email processing. This field should be set to the default value of **Yes**.
9. From the Group Server list, select the server group to which this server is to be added.
10. From the Server Type list, select the type of process, SMTP or IMAP.
11. If you want to save your work and create the IMAP or SMTP process, click **Create**.
12. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Related Topics:

- Modifying an Email Server, page 6-12
- Deleting an Email Server, page 6-14

Modifying an Email Server

You can customize and maintain the Oracle Email Server (OES) SMTP and IMAP processes that you have defined for your Email Center system.

Use this procedure to update your Oracle Email Server information.

Note: Before any changes you make to the email server will take affect, you must restart (bounce) the web (apache) server.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Email Server**.
The Email Servers page appears displaying summary information for the Oracle Email Server (OES) SMTP and IMAP processes defined in your Email Center system.
3. If you want to update the IMAP or SMTP process information, in the Server Name column, click the server name hyperlink for the IMAP or SMTP server type process that you want to update.
The Update Email Server page appears displaying the current information for the OES IMAP process server.
4. If you want to update the server name, in the Server Name field, type the unique name that you want to assign to the SMTP or IMAP process.
5. If you want to update the machine identifier on the network, in the DNS Name field type the unique machine identifier on the network.
6. If you want to update the IP address of the machine on which the process is running, in the IP Address field, type the IP address of the machine on which the process is running.
7. If you want to update the port number on which the process is running, in the Port field, type the port number on which the SMTP or IMAP process is running. For example, an SMTP process would typically run on port 25 and an IMAP process would typically run on port 143.
8. If you want to update the run time availability, from the RT Availability list, select the run time availability from the drop down list. This field enables internal tracking of email processing. This field should be set to the default value of Yes.
9. If you want to update the group server to which this server process is to be added, from the Group Server list, select the server group to which this server is to be added.
10. If you want to update the type of process, from the Server Type list, select the type of process, SMTP or IMAP.

11. If you want to save your work and update the IMAP or SMTP process information, click **Update**.
12. If you do not want to save your work and want to reset all the field values to the last saved values, click **Cancel**.

Related Topics:

- Creating an Email Server, page 6-11
- Deleting an Email Server, page 6-14

Deleting an Email Server

You can delete an Oracle Email Server (OES) SMTP and IMAP processes from your Email Center system by using the Email Center custom configuration functionality. However, you must create new Oracle Email Server (OES) SMTP and IMAP processes for your Email Center system before using Email Center to process email.

Use this procedure to delete an Oracle Email Server (OES) SMTP and IMAP process.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
2. In the side panel, click **Custom Configuration > Email Server**.
The Email Servers page appears displaying summary information for the Oracle Email Server (OES) SMTP and IMAP processes defined in your Email Center system.
3. If you want to individually select the OES process(es) to delete, in the Select column, select the box(es) next to the server name(s) of the processes you want to delete.
4. If you want to delete all of the OES SMTP and IMAP processes, click the **Select All** hyperlink.
5. If you want to delete the selected OES SMTP and IMAP process(es), click **Delete**.
6. If you want to deselect the selected boxes, click the **Select None** hyperlink.

Related Topics:

- Creating an Email Server, page 6-11

- Modifying an Email Server, page 6-12

Email Center Site Profile Options

Use the Profile hyperlink to set the Email Center Site Profile Options.

Tasks

You can perform the following tasks:

- Setting Email Center Site Profile Options, page 6-15

Setting Email Center Site Profile Options:

Setting site options enables the configuration process to appropriately set Email Center system values related to the options set.

Use this procedure to update your Email Center server group information.

Prerequisites

Initially configure Email Center, meaning that an Email Center default configuration must exist.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Profile** icon.
2. In the side panel, click **Email Center**.
The Email Center Site Profile Options page appears.
3. In the Email Template Knowledge Base Category field, search for and select the MES category to which you want to publish templates.
4. From the Default Spell Checking Dictionary list, select the dictionary for the appropriate language you want to use for spell checking.
5. From the Spell Check Message before sending list, select **Yes** or **No**.
6. In the Default Customer Number field, search for and select the party or customer number of the customer you want to use as the Email Center default customer. This customer can be of type Person, Organization and Party Relationship.
7. In the Cache Update Frequency field, type a numeric value between 5 and 60. This value represents number of minutes after which the Email Center Agent Console cache is re-validated.
8. From the Sender Name For Outbound Email list, select either **Account Sender Name** or **Agent Sender Name**. If you select **Account Sender Name**, the sender name value

of the appropriate email account will be used, such as Support@company.com. If you select **Agent Sender Name**, the first name and last name of the appropriate agent will be used.

9. In the Default Resource Number field, search for and select the resource number for the Oracle Apps resource who is associated with the Interaction automatically created by Email Center when performing any of the auto-processing actions, such as: auto-delete, auto-reply, etc..
10. In the Default SR Status Template field, search for and select the template you want to use as your default service request template.

When you select a template in this profile option, upon creating an SR, the title of the template is displayed as a hyperlink in the Service Request container with "Insert" and "Attach" options underneath it. This enables agents to insert a predefined SR status template with a single click rather than having to browse through the Knowledge Base repository for templates.

11. From the Reply To All list, select **Yes** or **No**. This profile option provides the ability to reply to all recipients copied on the incoming email. If an incoming email contains multiple email addresses in the "To" and "Cc" fields, then each of those addresses are automatically applied (copied) to the outbound response as well.
12. From the Include Incoming Attachments when Replying list, select **Yes** or **No**. If you sets this profile option to **Yes**, then the original attachments will automatically be attached to the reply being composed and the titles of the attachments will be displayed in the "Attachments" section.
13. If you want to save your work, click **Update**.
14. If you do not want to save your work and want to reset all the field values to the last saved values, click **Restore**.

Email Center Default Configuration

Use the Default Configuration subtab to identify the configuration of Email Center servers and databases after a *fresh* installation of Email Center. A fresh installation of Email Center is the installation of Email Center in an environment that does not contain a previous version of Email Center.

For new installations, it is recommended that you use the Email Center Default Configuration. This configuration can be customized using the Email Center Custom Configuration. The Email Center Default Configuration will generate a server group, define the Oracle Email Server (OES) database, create the three database links between the OES and Applications database, define the IMAP and SMTP servers, and create three email accounts (acknowledgements, intent and test).

Once the Default Configuration has been executed or an Email Center Custom Configuration set up, it will not be possible to access the Custom Configuration page. To view or change a configuration, use Email Center Custom Configuration from the Configuration subtab menu.

Removing a configuration (for example: all server groups, email accounts, database servers, database links, and email server entries) will enable access to the Email Center Default Configuration page.

Tasks

You can perform the following tasks:

- Configuring Email Center Servers and Databases, page 6-17

Configuring eMail Center Servers and Databases:

Use this procedure to identify the configuration of Email Center servers and databases after a *fresh* installation of Email Center.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
The Email Center Server Groups page appears.
2. From the side panel, click **Default Configuration**.
3. In the Email Center Server Group Name field, in the Email Center Server Group section, type a unique name for the Email Center server group that you want to create. This server group contains your SMTP and IMAP servers.
4. In the Oracle Email Server section, input your Oracle Email Server configuration information.
 1. In the IP Address field, type the IP address of the machine on which the Oracle Email Server process is running.
 2. In the Host Name field, type the name of the machine on which the Oracle Email Server database is running.
 3. In the Database Listener Port Number field, type the port number on which the database listener for the Oracle Email Server database is running.
 4. In the Database SID field, type the standard system identifier for the database, the Oracle SID.
 5. In the Database Global Name field, type the global name of the Oracle Email Server database. This value can be obtained from the GLOBAL_NAME table. It is typically a combination of the database SID and the domain name.
 6. In the OO User Password field, type the password that was specified during your Oracle Email Server configuration process for the OO user.
5. In the Application Server section, input the configuration information for your applications database (Apps database).

1. In the Host Name field, type the name of the machine on which the Apps database is running.
2. In the Port Number field, type the port number on which the database listener for the Apps database is running.
3. In the Database SID field, type the standard system identifier for the Apps database, the Oracle SID.
4. In the Apps Password field, type the password that was specified for the Apps user.
6. In the Email Account section, input the configuration information for your email accounts.
 1. In the Fully Qualified Domain Name field, type the Oracle Email Server domain name that you want to use for Email Center. This must be the fully qualified domain name that you created during your Oracle Email Server configuration process, for example: <company_name>.com.
 2. In the Oracle Email Server Node Name field, type the name of the node that you created during your Oracle Email Server configuration process. The word node refers to an Oracle Email Server database instance.
 3. In the Oracle Email Server Admin Password field, type the password that was specified during your Oracle Email Server configuration process for the Admin user.
 4. From the Language list, select the language in which most of the emails coming into the email accounts will be written. The default value for this field is 'English'.
7. If you want to clear all of the input fields, click **Clear**.
8. If you want to save your work, click **Create**.

Email Center Outbox Processing Console

The outbox processing console provides you with a means of viewing a summary of outbox processor activity, viewing the current outbox processor status, viewing emails that are "stuck" in the outbox, reprocessing stuck email messages, or purging stuck emails from the system.

Tasks

You can perform the following tasks:

- Viewing a Summary of Outbox Processor Activity, page 6-19
- Viewing the Current Outbox Processor Status, page 6-19
- Viewing Items That Failed Processing, page 6-20
- Viewing the Original Message, page 6-21
- Reprocessing Failed Items, page 6-22
- Purging Failed Items, page 6-23

Viewing a Summary of Outbox Processor Activity:

The Summary page displays the two processing queues that comprise the outbox processor:

- New Items
- Errored Items

For each queue, administrators can see how many items of each processing type are in queue. Administrators can then use this information to determine if there are any items that have errored out or to determine where the backlog of messages is located.

Use the following steps to view a summary of your outbox processor activity.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
The Server Groups page appears.
2. From the side panel, click **Outbox processing Console > Summary**.
The Outbox Processor Summary page appears, displaying a summary view table of activity by processing type (sent, deleted, transferred, etc.).

Related Topics:

- Viewing the Current Outbox Processor Status, page 6-19
- Viewing Items That Failed Processing, page 6-20
- Viewing the Original Message, page 6-21
- Reprocessing Failed Items, page 6-22
- Purging Failed Items, page 6-23

Viewing the Current Outbox Processor Status:

The Status page displays current run-time JVM (Java Virtual Machine) information. For each Controller running (one per JVM), you can see the Workers that are processing each of the queues. The Controller is responsible for starting and stopping the Workers and is tied to the running server host and port, Jserv ID and Jserv port. The Last Updated timestamp indicates the last time this object updated the database. A running count of messages that were processed by each worker is maintained for the life of the worker

Use the following steps to view the current status of your outbox processor activity.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
The Server Groups page appears.
2. From the side panel, click **Outbox processing Console > Status**.
The Outbox Processor Status page appears, displaying a summary view table.
3. Use the summary table to view the current Java Virtual Machine information.

Related Topics:

- Viewing a Summary of Outbox Processor Activity, page 6-19
- Viewing Items That Failed Processing, page 6-20
- Viewing the Original Message, page 6-21
- Reprocessing Failed Items, page 6-22
- Purging Failed Items, page 6-23

Viewing Items That Failed Processing:

The Errors page displays information pertaining to problems processing an Outbox item. Each message that is submitted to the Outbox is assigned a message id that is used to identify the message in the Outbox.

The table provides summary information about:

- Action - The purpose the item was put into the Outbox
- Agent - The FND_USER_ID of the agent that submitted the item
- Summary - The Email Center coded description of the Outbox error
- Detail - The first few lines of the Java stack trace
- Create Date - The first time the message was submitted to the Outbox

Use the following steps to view items that failed outbox processing.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
The Server Groups page appears.
2. From the side panel, click **Outbox processing Console > Errors**.
The Outbox processing Errors page appears, displaying a summary view table of all items that failed outbox processing.
3. In the Message ID column, click the appropriate message ID hyperlink to view detailed information about the error.
The Error Details page appears.

By clicking the message ID link for a particular item, you see all the details related to the errored Outbox item. This detailed information can be used to send to development, thereby helping them determine why a message cannot be processed.

Related Topics:

- Viewing a Summary of Outbox Processor Activity, page 6-19
- Viewing the Current Outbox Processor Status, page 6-19
- Viewing the Original Message, page 6-21
- Reprocessing Failed Items, page 6-22
- Purging Failed Items, page 6-23

Viewing the Original Message:

Use the following steps to view the original message.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Email Center Message Component

Steps

1. Click the **Configuration** subtab.
The Server Groups page appears.
2. From the side panel, click **Outbox processing Console > Errors**.
The Outbox processing Errors page appears, displaying a summary view table of all items that failed outbox processing.
3. In the Message ID column, click the appropriate message ID hyperlink to view detailed information about the error.
The Error Details page appears.
By clicking the message ID link for a particular item, you see all the details related to the errored Outbox item. This detailed information can be used to send to development, thereby helping them determine why a message cannot be processed.
4. From the Error Details page, click **View Message** to view the original message.
The Message Component opens to display the original message.

Related Topics:

- Viewing a Summary of Outbox Processor Activity, page 6-19
- Viewing the Current Outbox Processor Status, page 6-19
- Viewing Items That Failed Processing, page 6-20
- Reprocessing Failed Items, page 6-22
- Purging Failed Items, page 6-23

Reprocessing Failed Items:

There are two options for messages in the Error queue Reprocess and Purge. Before attempting to Reprocess or Purge, you should first attempt to discover what the problem is.

In some cases, a message may have failed processing due to an environmental condition. For example:

- The SMTP or IMAP server is down
- The Oracle Customer Interaction History Database objects are invalid
- The database is down

In these cases, there is no problem with the message. Once the environmental issue has been corrected, the message should be successfully processed.

For such messages clicking **Reprocess** will remove the error rows from the database and the Outbox processor will attempt to reprocess these messages

Use the steps below to reprocess messages stuck in the outbox.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
The Server Groups page appears.
2. From the side panel, click **Outbox processing Console > Errors**.
The Outbox processing Errors page appears, displaying a summary view table of all items that failed outbox processing.
3. To reprocess an individual message from the main Outbox processing Errors page:
 1. In the Select column, select the email message you want to reprocess.
 2. Click **Reprocess**.
Processing begins on the selected message.
4. To reprocess all messages from the main Outbox processing Errors page:
 1. Click **Reprocess All**.
Processing begins on all messages stuck in the Outbox Processor.
5. To reprocess an individual message from the Error Details page:
 1. In the Message ID column, click the message ID hyperlink for the message you want to reprocess.
The Error Details page appears.
 2. From the Error Details page, click **Reprocess**.
Processing begins on the message.

Related Topics:

- Viewing a Summary of Outbox Processor Activity, page 6-19
- Viewing the Current Outbox Processor Status, page 6-19
- Viewing Items That Failed Processing, page 6-20
- Viewing the Original Message, page 6-21
- Purging Failed Items, page 6-23

Purging Failed Items:

There are two options for messages in the Error queue Reprocess and Purge. Before attempting to Reprocess or Purge, you should first attempt to discover what the problem is.

In some cases, there may be problems processing a message due to insufficient or inaccurate data associated to the item. For examples:

- A malformed email address.
- A deleted attachment document.
- A coding problem.

If you are experiencing a code problem, you can either file a TAR or bug (providing a View Source of the Error Detail page), or you can simple purge the message.

Purged messages are either deleted from the system or pushed back to the submitter (agent).

Deleting the message from the system deletes all information associated to the submitted item. Deleting should be used only after you have determined that the message is cannot be salvaged or lost.

A pushed back message will re-appear in the Agent's Inbox and the Note entered on the Purge page will be available for the agent's review

Use the steps below to purge a message from the Outbox processing Console

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Configuration** subtab.
The Server Groups page appears.
2. From the side panel, click **Outbox processing Console > Errors**.
The Outbox processing Errors page appears, displaying a summary view table of all items that failed outbox processing.
3. To purge an individual message from the main Outbox processing Errors page:
 1. In the Select column, select the email message you want to purge.
 2. Click **Purge**.
The Purge page appears.
 3. Optionally, in the Push Back Note field, type a note explaining situation to the original agent.
 4. Click **Apply**.
4. To purge all messages from the main Outbox processing Errors page:
 1. Click **Delete All**.
 2. Optionally, in the Push Back Note field, type a note explaining situation to the original agent(s).

3. Click **Apply**.
5. To purge an individual message from the Error Details page:
 1. In the Message ID column, click the message ID hyperlink for the message you want to purge.

The Error Details page appears.
 2. From the Error Details page, click **Purge**.

The Purge page appears.
 3. Optionally, in the Push Back Note field, type a note explaining situation to the original agent.
 4. Click **Apply**.

Related Topics:

- Viewing a Summary of Outbox Processor Activity, page 6-19
- Viewing the Current Outbox Processor Status, page 6-19
- Viewing Items That Failed Processing, page 6-20
- Viewing the Original Message, page 6-21
- Reprocessing Failed Items, page 6-22

Email Accounts

In order for you to receive email messages in your Email Center, you must create email accounts to which your customers can send email. You can use the accounts functionality available from the Email Center Self Service Administration Console to set up and maintain these email accounts. When you create the email accounts using the Email Center accounts functionality, the necessary email accounts are created in both OES and in Email Center.

Use the **Account** hyperlink to manage email accounts.

Tasks

You can perform the following tasks:

- Managing Email Accounts, page 6-25
- Managing Agents and Email Accounts, page 6-30
- Assigning Processing Rules to Email Accounts, page 6-36
- Assigning Tags to Email Accounts, page 6-51

Managing Email Accounts:

Topics include:

- Creating an Email Account, page 6-26
- Modifying an Email Account, page 6-27
- Deleting an Email Account, page 6-29

Creating an Email Account

You can create email accounts for your business operations in both Oracle Email Server (OES) and Email Center using the accounts functionality of the Email Center Self Service Administration Console. Your email accounts must be created in OES and Email Center in order to be used with Email Center.

Note: Although you can create OES email accounts using the OES configuration assistant utility, the OES functionality cannot be used to create email accounts for Email Center.

Use this procedure to create email accounts.

Prerequisites

Oracle Email Center default configuration must be completed before you can create email accounts.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Summary**.
The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.
3. On the Email Accounts page, click **Create**.
The Create Email Account page appears.
4. In the Name field, type name for the email account you are creating. You can enter a name using any combination of upper and lower case characters. This is used as the internal Email Center account name.
5. In the Email Account field, type a unique and descriptive email account name that you wish to create for your business. This is the email account name such as "Support".
6. In the Domain field, type the domain name for the email account such as Emailcenter.com.
Note: The domain name must have been defined in OES.
7. In the Profile field, type the text description for the account.
8. From the Email Database Server list, select the email database server on which this email account needs to be created.

9. From the Language list, select the language in which Oracle Text processing occurs. The default value for this field is English.
10. From the Keyword Extraction Method list, select whether you want to use themes or tokens.

Intent analysis must be enabled for keyword extraction to take place.

For more information on keyword extraction, refer to the Intent Processing, page 2-21 topic.
11. From the Spell Checking Dictionary list, select the language you want your spell checking dictionary to utilize.
12. In the Reply To field, type a valid email account name, <email account name>@<Domain>, in which you want to receive responses to outgoing email messages. This must be a valid email account name. Note: Email Center does not perform validation checking on the value input in this field.
13. In the Sender Name field, type the name that you want the recipients of the outgoing email, sent from this account, to recognize as the sender name.
14. From the Enable Customized Processing Flow list, select the value of **Yes** or **No**. The default value is No. Select the value of Yes if you would like to enable customized workflow processing for your Email Center processing. Email Center is shipped with a default workflow called the Mail Preprocessing workflow, which was also provided with previous versions of Email Center. If you select the value of Yes, Email Center calls the Mail Preprocessing workflow and perform any customized processing defined within the workflow.

Note: If you have not implemented any customizations in the Mail Preprocessing workflow, you should select the No value for this field. Setting the value to No reduces Email Center processing time that would otherwise be used to call and execute the Mail Preprocessing workflow.
15. In the Password field, type the password for the email account.
16. In the Re-enter Password field, retype the password for the email account.
17. If you want to save your work and create the email account, click **Create**.
18. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Related Topics:

- [Modifying an Email Account, page 6-27](#)
- [Deleting an Email Account, page 6-29](#)

Modifying an Email Account

You can maintain email accounts for your business operations by using the accounts functionality of the Email Center Self Service Administration Console. When you update the email accounts the changes are recorded in both Oracle Email Server (OES) and Email Center.

Note: You cannot update the email account name or the domain name. To change these, you must first delete the account and create a new one with the correct email account name and domain.

Use this procedure to update your email accounts.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Summary**.
The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.
3. In the Email Account column, click the email account name hyperlink for the account that you want to update.
The Update Email Account page appears displaying the current information for the email account.
4. If you want to update the text description for the account, in the Profile field, type the text description for the account.
5. If you want to update the language in which Oracle Text processing occurs, from the Language list, select the language in which Oracle Text processing occurs.
6. If you want to update the keyword extraction type, from the Keyword Extraction list, select the appropriate method.
Intent analysis must be enabled for keyword extraction to take place.
For more information on keyword extraction, refer to the Intent Processing, page 2-21 topic.
7. If you want to change the spell checking dictionary language, from the Spell Checking Dictionary list, select a different language.
8. If you want to update the email account in which you want to receive responses to outgoing email messages, in the Reply To field, type a valid email account name, <email account name>@<Domain>, in which you want to receive responses to outgoing email messages. This must be a valid email account name.

Note: Email Center does not perform validation checking on the value input in this field.

9. If you want to update the name that you want the recipients of the outgoing email to recognize as the sender name, in the Sender Name field, type the name that you want the recipients of the outgoing email, sent from this account, to recognize as the sender name.
10. If you want to enable or disable customized workflow processing for your Email Center processing, from the Enable Customized Processing Flow list, select the value of Yes or No.
11. If you want to change the password for this email account, in the Password field, type the new password for the email account.
12. If you want to change the password for this email account, in the Re-enter Password field, retype the password for the email account.
13. If you want to save your work and update the IMAP or SMTP process information, click **Update**.
14. If you do not want to save your work and want to reset all the field values to the last saved values, click **Cancel**.

Related Topics:

- Creating an Email Account, page 6-26
- Deleting an Email Account, page 6-29

Deleting an Email Account

You can delete email accounts by using the accounts functionality of the Email Center Self Service Administration Console.

Email accounts cannot be deleted if:

- Email messages exist that were composed as responses to an email message sent to the email account, and which have not been sent.
- Agents are associated with the email account.
- Email messages have been received but have not yet been processed. *Note:* Refer to the appendix on Process Flows for more detailed information about this topic.
- Email messages exist in the queues for the email account or email messages exist in the classification folder for the email account.

When email accounts are deleted, the following items are also deleted:

- The associations of Email Center classifications and the email account
- Classifications folders on OES for the email account
- The associations of Email Center routes and the email account
- The associations of the email processing rules and the email account
- The associations of custom tags and the email account
- The associations to MES document search categories and the email account
- The OES rule related to the email account
- Intents and keywords related to the email account

Use this procedure to delete email accounts.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Summary**.
The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.
3. If you want to individually select the email account(s) to delete, in the Select column, select the box(es) next to the email account name(s) of the accounts you want to delete.
4. If you want to delete all of the email accounts, click the **Select All** hyperlink.
5. If you want to delete the selected email account(s), click **Delete**.
6. If you want to deselect the selected boxes, click the **Select None** hyperlink

Related Topics:

- Creating an Email Account, page 6-26
- Modifying an Email Account, page 6-27

Managing Agents and Email Accounts:

Topics include:

- Assigning Agents to Email Accounts, page 6-30
- Removing Agents from Email Accounts, page 6-31
- Assigning Email Accounts to Agents, page 6-33
- Removing Email Accounts From Agents, page 6-34

Assigning Agents to Email Accounts

Use this procedure to assign an agent to an email account.

Prerequisites

Create the email account.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Agents**.
The Agents and Accounts Assignment page appears.
3. From the Assign list, select **Agents to Accounts** and click **Go**.

4. From the list in the Email Account field, select the email account to which you want to assign an agent and click **Go**.

The Assign an Agent to an Email Account page refreshes with the list of available agents displayed in the Available Agents list. The Assigned Agents list displays the list of agents that had previously been assigned to the email account.

Note: A number is listed in brackets next to agent names displayed in the Assigned Agent list. This number represents the number of email messages that are currently in the agent's Inbox for the account.

5. If you want to assign selective agents to the email account, do one of the following.
 1. From the Available Agents list, double click to select the agent that you want to assign to the email account.
 2. From the Available Agents list, select the agent(s) that you want to assign to the email account and then click the Move icon.

Note: You can select multiple agents by holding down the Shift key or the Ctrl key.

6. If you want to assign all available agents to the email account, click the Move All icon.
7. If you want to save your work and assign the agent(s) to the email account, click **Apply**.

A confirmation message appears indicating that the agent(s) has been successfully assigned to the email account.

Related Topics:

- Removing Agents from Email Accounts, page 6-31
- Assigning Email Accounts to Agents, page 6-33
- Removing Assigned Email Accounts From Agents, page 6-34

Removing Agents from Email Accounts

You can remove agents from email accounts so that they will not be able to access email messages sent to the account. However, agents can only be removed (unassigned) if there are no fetched email messages for that agent.

Use this procedure to remove assigned agents from an email account.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Agents**.
The Agents and Accounts Assignment page appears.
3. From the Assign list, select **Agents to Accounts** and click **Go**.
The Assign an Agent to an Email Account page reappears with the list of available agents displayed in the Available Agents list. The Assigned Agents list displays the list of agents that had previously been assigned to the email account.
Note: A number is listed in brackets next to agent names displayed in the Assigned Agent list. This number represents the number of email messages that are currently in the agent's Inbox for the account.
4. If you want to remove selective agents from the email account, from the Assigned Agents list, select the agent(s) that you want to remove from the email account and then click the Remove icon.
Note: You can select multiple agents by holding down the Shift key or the Ctrl key.
Note: Agents can only be removed (unassigned) if there are no fetched email messages for that agent, meaning that the number in brackets, after the agent name, is zero (0).
5. If you want to remove all assigned agents from the email account, click the Remove All icon.
6. If you want to save your work and remove the assigned agent(s) from the email account, click **Apply**.
A confirmation message appears indicating that the agent(s) has been successfully removed (unassigned) from the email account.

Related Topics:

- Assigning Agents to Email Accounts, page 6-30

- Assigning Email Accounts to Agents, page 6-33
- Removing Assigned Email Accounts From Agents, page 6-34

Assigning Email Accounts to Agents

Use this procedure to assign email accounts to an Agent.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Agents**.
The Agents and Accounts Assignment page appears.
3. From the list in the Assign field, select **Accounts to Agents** and click **Go**.
4. Enter the search criteria to search for the agent(s) you want to assign to an email account.
 1. If you want to search for an agent using the agent's user name, in the Agent User Name field, type the name of the agent.
 2. If you want to search for an agent using the first name of the agent, in the First Name field, type the first name of the agent.
 3. If you want to search for an agent using the last name (family name) of the agent, in the Last Name field, type the last name of the agent.
 4. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.
 5. If you want to search for an agent based on their assigned Email Center resource roles, from the Resource Role list, select the resource role.
5. Click **Search**.
The agent search results appears listing the agents which were found to match the given search criteria.
6. In the Select column, select the agent you want to assign to email accounts.
7. Click **Assign Email Account**.
The Agents and Accounts Assignment page refreshes with the list of available email accounts displayed in the Available Email Account list. The Assigned Email Account list displays the list of email accounts that had previously been assigned to the agent.

Note: A number is listed in brackets next to email account names displayed in the Assigned Email Account list. This number represents the number of email messages that are currently in the agent's Inbox for the account.

8. If you want to assign selective email accounts to the agent, do one of the following.
 1. From the Available Email Accounts list, double click to select the email account that you want to assign to the agent.
 2. From the Available Email Account list, select the account(s) that you want to assign to the agent and then click the Move icon.

Note: You can select multiple accounts by holding down the Shift key or the Ctrl key.

9. If you want to assign all available email accounts to the agent, click the Move All icon.
10. If you want to save your work and assign the email account(s) to the agent, click **Apply**.

A confirmation message appears indicating that the email account(s) has been successfully assigned to the agent.

Related Topics:

- Assigning Agents to email Accounts, page 6-30
- Removing Agents from email Accounts, page 6-31
- Removing Assigned email Accounts From Agents, page 6-34

Removing Email Accounts from Agents

Use this procedure to remove assigned email accounts from an Agent.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel under the Accounts section, click **Agents**.
The Agents and Accounts Assignment page appears.

3. From the list in the Assign field, select **Accounts to Agents** and click **Go**.
4. Enter the search criteria to search for the agent(s) for whom you want to remove an assigned email account.
 1. If you want to search for an agent using the agent's user name, in the Agent User Name field, type the name of the agent.
 2. If you want to search for an agent using the first name of the agent, in the First Name field, type the first name of the agent.
 3. If you want to search for an agent using the last name (family name) of the agent, in the Last Name field, type the last name of the agent.
 4. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.
 5. If you want to search for an agent based on their assigned Email Center resource roles, from the Resource Role list, select the resource role.

5. Click **Search**.

The agent search results appears listing the agents which were found to match the given search criteria.

6. In the Select column, select the box next to the agent user name of the user for whom you want to remove assigned email accounts.

7. Click **Assign Email Account**.

The Agents and Accounts Assignment page refreshes with the list of available email accounts displayed in the Available Email Account area. The Assigned Email Account list displays the list of email accounts that are currently assigned to the agent.

Note: A number is listed in brackets next to email account names displayed in the Assigned Email Account list. This number represents the number of email messages that are currently in the agent's Inbox for the account.

8. If you want to remove selective email accounts from an agent, from the Assigned Email Account list, select the account(s) that you want to remove from the agent and then click the Remove icon.

Note: You can select multiple accounts by holding down the Shift key or the Ctrl key.

Note: Accounts can only be removed (unassigned) if there are no fetched email messages for that agent, meaning that the number in brackets, after the email account name, is zero (0).

9. If you want to remove all assigned email accounts from the agent, click the Remove All icon.
10. If you want to save your work and remove the assigned email account(s) from the agent, click **Apply**.

A confirmation message appears indicating that the email account(s) has been successfully removed (unassigned) from the agent.

Related Topics:

- Assigning Agents to Email Accounts, page 6-30
- Removing Agents from Email Accounts, page 6-31
- Assigning Email Accounts to Agents, page 6-33

Assigning Processing Rules to Email Accounts:

The Email Center Self Service Administration console provides an interface where you can associate existing processing rules to existing accounts. This interface also provides a single comprehensive view of all processing rules associated with a selected email account.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

- Topics include:
- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Classification Rules

For incoming emails addressed to a specific account to be assigned to the respective queue, one or more classifications must be associated to that email account. This account association must be enabled in order for a classification to be executed. A classification must be associated to an account before the classification folder (bearing the same name as the classification rule) appears for that account. Classifications that are not enabled will not be executed. Classification priorities are used to determine the order in which each classification and its rules are executed. The priority of each classification is unique; the priority can be changed; and, in doing so, it will affect the values of other classification priorities. By default, newly defined classifications are assigned the lowest priority among the existing classifications.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate a classification rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the classification rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Classification Name column, select the classification rule you want to associate to the email account.
7. Click **Apply**.
The selected classification rule is added to the summary view table and it's name is displayed as a hyperlink in the Classification Name column. You can view the

components of or update the classification by clicking the hyperlinked name in the Classification Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second classification rule is associated to the email account.

8. If you are associating additional classification rules to an email account, use the Priority list to determine a hierarchy among the classification rules.

Note: Rules cannot share the same priority level.

9. Ensure the Enabled box is checked for each classification rule you want to use.
10. Click **Apply**.

Related Topics:

- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Auto-Delete Rules

Auto-delete rules allow you to control the automatic deletion of inbound emails without processing them. If the criteria in an auto-delete rule is met by an incoming email message, further processing of the email is terminated and the email is delivered to the Delete folder for the particular account with which the rule is associated. This type of rule will prevent the processing of junk email such as bounced messages and spam.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate an auto-delete rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the auto-delete rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Delete.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-delete rule you want to associate to the selected email account.
7. Click **Apply**.
The selected auto-delete rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-delete rule by clicking the hyperlinked name in the Rule Name column.
A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-delete rule is associated to the email account.
8. If you are associating additional auto-delete rules to an email account, use the Priority list to determine a hierarchy among the auto-delete rules.
Note: Rules cannot share the same priority level.
9. Ensure the Enabled box is checked for each auto-delete rule you want to use.
10. Click **Apply**.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Auto-Acknowledge Rules

Auto-acknowledgements are confirmation emails that are sent for every incoming email received by an email account. These emails simply confirm receipt of the incoming email and may provide some indication of when the customer can expect a response. Auto-acknowledgements do not contain any content that is used to respond to a customer enquiry.

Upon successful execution of the auto-acknowledge rule, Email Center will ignore other auto-acknowledge rules of a lower priority and continue processing the email.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate an auto-acknowledge rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.

3. From the list in the Email Account field, select the email account to which you want to assign the auto-acknowledge rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Acknowledge.

The Account Association page appears.

5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-acknowledge rule you want to associate to the selected email account.
7. Click **Apply**.

The selected auto-acknowledge rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-acknowledge rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-acknowledge rule is associated to the email account.

8. If you are associating additional auto-acknowledge rules to an email account, use the Priority list to determine a hierarchy among the auto-acknowledge rules.

Note: Rules cannot share the same priority level.

9. Ensure the Enabled box is checked for each auto-acknowledge rule you want to use.
10. Click **Apply**.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Auto-Processing Rules

Auto-processing rules define the processing actions that are automatically performed on incoming emails. Such actions include creating service requests, creating leads, or executing a custom procedure.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate an auto-processing rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the auto-processing rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Processing.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-processing rule you want to associate to the selected email account.

7. Click **Apply**.

The selected auto-processing rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-processing rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-processing rule is associated to the email account.

8. If you are associating additional auto-processing rules to an email account, use the Priority list to determine a hierarchy among the auto-processing rules.

Note: Rules cannot share the same priority level.

9. Ensure the Enabled box is checked for each auto-processing rule you want to use.
10. Click **Apply**.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Auto-Redirect Rules

Auto-redirect rules enable you to redirect the incoming email to another Oracle Email Center account or an external email address. Oracle Customer Interaction History will be recorded in both cases.

If an old email address or account is terminated then a “Auto Redirect” rule can reroute emails received for that old account to a new account. When an email is rerouted to another Oracle Email Center account, the email will be reprocessed based on rules defined for that account.

Auto Redirect to an external email address enables incoming emails to be redirected to an agent’s external email address if the agent currently cannot log into the Oracle Email Center application

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate an auto-redirect rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the auto-redirect rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Redirect.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-redirect rule you want to associate to the selected email account.
7. Click **Apply**.
The selected auto-redirect rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-redirect rule by clicking the hyperlinked name in the Rule Name column.
A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-redirect rule is associated to the email account.
8. If you are associating additional auto-redirect rules to an email account, use the Priority list to determine a hierarchy among the auto-redirect rules.

Note: Rules cannot share the same priority level.

9. Ensure the Enabled box is checked for each auto-redirect rule you want to use.
10. Click **Apply**.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Auto-Reply Rules

Auto-reply rules allow you to determine whether you want to automatically reply to an incoming email using a specified document.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate an auto-reply rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.

2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the auto-reply rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Reply.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the auto-reply rule you want to associate to the selected email account.
7. Click **Apply**.
The selected auto-reply rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the auto-reply rule by clicking the hyperlinked name in the Rule Name column.
A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-reply rule is associated to the email account.
8. If you are associating additional auto-reply rules to an email account, use the Priority list to determine a hierarchy among the auto-reply rules.
Note: Rules cannot share the same priority level.
9. Ensure the Enabled box is checked for each auto-reply rule you want to use.
10. Click **Apply**.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Document Retrieval Rules

Document retrieval rules allow you to determine whether you want the response document retrieval process to be based on matching keywords extracted from the incoming email to the keywords in documents stored in the Knowledge Base repositories, or based on a mapping of the incoming email to a specific category in Marketing Encyclopedia System (MES).

Different categories can be selected for different conditions defined using the rules engine.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate a document retrieval rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule. When using keyword matching rules, intent processing must be enabled for the account to which you are associating the rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the document retrieval rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.

The Account Association page appears.

5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Rule Name column, select the document retrieval rule you want to associate to the selected email account.
7. Click **Apply**.

The selected document retrieval rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the document retrieval rule by clicking the hyperlinked name in the Rule Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second document retrieval rule is associated to the email account.

8. If you are associating additional document retrieval rules to an email account, use the Priority list to determine a hierarchy among the document retrieval rules.

Note: Rules cannot share the same priority level.

9. Ensure the Enabled box is checked for each document retrieval rule you want to use.
10. Click **Apply**.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Routing Rules, page 6-48
- Deleting Processing Rule Assignments, page 6-50

Assigning Routing Rules

Routing rules allow you to designate rules for routing incoming emails to the original agent, or a specified group of agents.

By assigning routing rules to accounts, you are assigning primary and default destinations to which you want the email to be routed. Remember that "Original Agent" is available as a choice for Primary destination and "All Groups" is available as a choice in Default destination. If the route is satisfied, the primary destination is the first choice; however, if the primary destination is not valid for any reason, the email will be routed to the default destination. If the default destination is also not valid, then the email will be routed to "All Groups".

To ensure that every email is processed, by default an email will get routed to all agents assigned to that email account if:

- The administrator does not associate any routing rule to that email account OR
- All the routing rules assigned to that account fail.

Note: This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

Note: See the Processing Rules, page 6-53 topic for information on creating Processing Rules.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the following steps to associate a routing rule with an email account.

Prerequisites

Before you can assign a processing rule to an email account, you must first create the processing rule.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account to which you want to assign the routing rule(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Routing.
The Account Association page appears.
5. Ensure that the correct email account is displayed in the Email Account field.
6. From the list in the Name column, select the routing rule you want to associate to the selected email account.

7. From the list in the Primary Destination column, select the primary routing destination you want to use.
8. From the list in the Default Destination column, select the default destination you want to use.

Note: If the route is satisfied, the primary destination is the first choice; however, if the primary destination is not valid for any reason, the email will be routed to the default destination. If the default destination is also not valid, then the email will be routed to "All Groups".

9. Click **Apply**.

The selected routing rule is added to the summary view table and its name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the routing rule by clicking the hyperlinked name in the Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second routing rule is associated to the email account.

10. If you are associating additional routing rules to an email account, use the Priority list to determine a hierarchy among the routing rules.

Note: Rules cannot share the same priority level.

11. Ensure the Enabled box is checked for each routing rule you want to use.
12. Click **Apply**.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Deleting Processing Rule Assignments, page 6-50

Deleting Processing Rule Assignments

If you decide you do not want a particular processing rule assigned to an email account, the Email Center Self Service Administration console allows you to delete its assignment to that account.

Use the steps below to delete a processing rule assignment to an email account.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Processing Rules**.
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. From the list in the Email Account field, select the email account from which you want to delete the processing rule assignment(s) and click **Go**.
The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
4. In the Email Processing Rules by Type column, click the + sign icon for the rule type containing the processing rule assignment you want to delete.
The summary view table expands to display all processing rules of the selected type that are associated to the selected email account.
Note: You must expand the rule type before you can delete its rule assignments.
5. In the Add/Delete column, click the trash can icon corresponding to the rule association you to delete.
The association is deleted and you receive a confirmation note stating that the rule and email account association has been removed successfully.

Related Topics:

- Assigning Classification Rules, page 6-36
- Assigning Auto-Delete Rules, page 6-38
- Assigning Auto-Acknowledge Rules, page 6-40
- Assigning Auto-Processing Rules, page 6-42
- Assigning Auto-Redirect Rules, page 6-43
- Assigning Auto-Reply Rules, page 6-45
- Assigning Document Retrieval Rules, page 6-47
- Assigning Routing Rules, page 6-48

Associating Tags to Email Accounts:

Email Center utilizes two categories of tags:

- System - System tags are seeded key value pairs, which are maintained and processed by the Email Center server processing engine.
- Custom - Custom tags are defined by the administrator. These tags are not appended to the email by default but have to explicitly associated with each email account.

Once a custom tag is associated with an email account, every outbound email sent from that account will automatically include this tag.

Note: This page only allows you to assign existing custom tags to existing accounts. Both the custom tag you want to assign and the account to which you want to assign the tag, must already exist.

Note: See the Email Tags , page 6-75topic for information on creating custom tags.

Note: See the Managing Email Accounts, page 6-25 topic for information on creating email accounts.

Use the steps below to associate custom tags to email accounts.

Prerequisites

Before you can assign a tag to an email account, you must first create the tag.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel under the Accounts section, click **Tags**.
The Account Association page appears.
3. From the list in the Email Account field, select the email account to which you want to associate a custom tag and click **Go**.
The Available Tags list refreshes to display all the custom tags available for association to the selected email account and the Associated Tags list refreshes to display all custom tags that are currently associated to the selected account.
4. If you want to assign selective tags to the email account, do one of the following.
 1. From the Available Tags list, double-click to select each tag that you want to associate to the email account.
 2. From the Available Tags list, select the tag(s) that you want to associate to the email account, then click **Move**.

Note: You can select multiple tags by holding down the Shift key or the Ctrl key.

5. If you want to associate all available tags to the email account, click **Move All**.
6. Click **Apply**.

The selected tags are associated to the email account and the Account Association page refreshes to display a confirmation message stating that the association of tags with email account has been updated successfully.

Processing Rules

The Email Center Self Service Administration console provides an interface where you can define rules for all processing and automated processing actions, including:

- **Classification** - This rule type is defined to determine the classification or category of an email. For each classification associated to an email account, a folder of same name will be created for that account.
- **Auto-Delete** - This type of rule pertains to automatically deleting incoming emails such as bounced messages or spam without processing it.
- **Auto-Acknowledge** - This type of rule pertains to sending an auto-acknowledgement to the sender of the email.
- **Auto-Processing** - This type of rule pertains to processing actions that will be performed automatically on the incoming email such as update the status of an existing service request, create a lead, or execute a custom procedure.
- **Auto-Redirect** - This type of rule pertains to automatically redirecting emails to different accounts.
- **Auto-Reply** - This rule type pertains to either automatically replying to an incoming email using specified documents.
- **Document Retrieval** - This rule pertains to retrieving probable response documents.
- **Routing** - This rule type pertains to routing an email to an agent or resource group of agents.

Tasks

You can perform the following tasks.

- Creating Classification Rules, page 6-54
- Creating Auto-Delete Rules, page 6-56
- Creating Auto-Acknowledge Rules, page 6-57
- Creating Auto-Processing Rules, page 6-59
- Creating Auto-Redirect Rules, page 6-61
- Creating Auto-Reply Rules, page 6-62
- Creating Document Retrieval Rules, page 6-64
- Creating Routing Rules, page 6-66
- Modifying Processing Rules, page 6-67

- Deleting Processing Rules, page 6-68

Creating Classification Rules:

Classifications are user-defined categories or queues that emails are placed in depending upon their properties and content. For example, classifications could be used to define various service levels, distinguish between customers, etc. Classifications can also be used by the routing engine as one of the criteria upon which an email is delivered to a group of agents. You define a classification rule to determine the classification or category of an email. A rule is composed of a set to keys, operators, and values. Many rules can be combined, using rule chaining, to create a complex classification rule.

A classification must be associated to an account before the classification folder (bearing the same name as the classification rule) appears for that account.

Use the following steps to create a classification rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.
The Create Classification page appears.
4. In the Classification Name field, type a name for the classification you are creating.
5. Optionally, in the Description field, type a short description for the classification.
6. From the list in the Classification Type field, select **Static** or **Dynamic** and click **Go**.
Static classifications classify based on specific criteria you designate using conditions (key/operator/value).
Dynamic classifications classify based on criteria Email Center does not know out of the box. For example: if you wanted to classify incoming emails as "Gold" based on revenue statistics which exist in some customized table or external system, you can write a procedure that determines the value parameter by which the email would be classified as "Gold" or not.

7. If you selected **Static**, the Create Classification page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
 1. From the list in the Key field, select a key for the classification rule you are creating.
 2. From the list in the Operator field, select an operator for the classification rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the classification rule you are creating.
8. If you selected **Dynamic**, the Create Classification page refreshes to display a procedure area where you can define the procedure name and variables you want to use.

Note: When creating dynamic classification rules, please follow the TIP guidelines on what kind of procedures can be used. The procedure will fail if the procedure does not follow the criteria specified in the TIP.

1. In the Procedure Name field, type a name for the procedure you will use for your dynamic classification.
 2. In the list in the OUT Parameter Type field, select the data type you want to use for your classification.
 3. From the list in the Operator field, select an operator for the classification rule you are creating.
 4. From the list in the Value field, search for and select, or type a value for the classification rule you are creating.
9. Click **Create**.

The Email Processing Rules page refreshes and the new classification rule is displayed in the summary view table.

Related Topics:

- [Creating Auto-Delete Rules, page 6-56](#)
- [Creating Auto-Acknowledge Rules, page 6-57](#)
- [Creating Auto-Processing Rules, page 6-59](#)
- [Creating Auto-Redirect Rules, page 6-61](#)
- [Creating Auto-Reply Rules, page 6-62](#)
- [Creating Document Retrieval Rules, page 6-64](#)
- [Creating Routing Rules, page 6-66](#)
- [Modifying Processing Rules, page 6-67](#)
- [Deleting Processing Rules, page 6-68](#)

Creating Auto-Delete Rules:

Auto-delete rules allow the automatic deletion of inbound emails without processing them. If the criteria in an auto-delete rule is met by an incoming email message, further processing of the email is terminated and the email is delivered to the Delete folder for the particular account with which the rule is associated. This type of rule will prevent the processing of junk email such as bounced messages and spam.

Use the following steps to create an auto-delete rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Delete.
The Create Auto-Delete Rule page appears.
4. In the Name field, type a name for the auto-delete rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-delete rule.
6. From the list in the Key field, select a key for the auto-delete rule you are creating.
7. From the list in the Operator field, select an operator for the auto-delete rule you are creating.
8. From the list in the Value field, search for and select, or type a value for the auto-delete rule you are creating.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.
Note: If **And** is selected, every condition defined must be evaluated as true in order for the rule to be used. If **Or** is selected, the rule will be applied if any of the conditions contained in it are evaluated as true. Conditions are evaluated in the order that they are listed.
10. Repeat steps 6-8 for each condition you want to add to the rule.
11. Click **Create**.

The Email Processing Rules page refreshes and the new auto-delete rule is displayed in the summary view table.

Related Topics:

- Creating Classification Rules, page 6-54
- Creating Auto-Acknowledge Rules, page 6-57
- Creating Auto-Processing Rules, page 6-59
- Creating Auto-Redirect Rules, page 6-61
- Creating Auto-Reply Rules, page 6-62
- Creating Document Retrieval Rules, page 6-64
- Creating Routing Rules, page 6-66
- Modifying Processing Rules, page 6-67
- Deleting Processing Rules, page 6-68

Creating Auto-Acknowledge Rules:

Auto-acknowledgements are confirmation emails that are sent for every incoming email received by an email account. These emails simply confirm receipt of the incoming email and may provide some indication of when the customer can expect a response. Auto-acknowledgements do not contain any content that is used to respond to a customer enquiry.

An "All emails" option is provided. In most cases you may want to send an acknowledgment to all emails received apart from the ones that get automatically deleted. You can easily do so by checking the "All Emails" box.

Note: If you check the All Emails box, you do not need to provide conditions for the auto-acknowledge rule. If the All Emails box is checked, any conditions for that rule will be ignored.

If you want to be more specific as to which incoming emails receive an auto-acknowledgement, you can use the provided key/operator/value combinations to set specific conditions for when an auto-acknowledgement will be sent out.

Since the only action possible for the auto-acknowledge rule type is to send out an email acknowledgement, you can select the MES category and the specific template from the provided lists.

Upon successful execution of the auto-acknowledge rule, Email Center will ignore other auto-acknowledge rules of a lower priority and continue processing the email.

Use the following steps to create an auto-acknowledge rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Acknowledge.
The Create Auto-Acknowledge Rule page appears.
4. In the Name field, type a name for the auto-acknowledge rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-acknowledge rule.
6. If you want to send an auto-acknowledgement to all emails coming into the email account to which this rule is associated, click the **All Emails** box.
Note: If you check the All Emails box, you do not need to provide conditions for the auto-acknowledge rule. If the All Emails box is checked, any conditions for that rule will be ignored.
7. If you do not want auto-acknowledgements to go out to all emails, use the Key, Operator, and Value fields to specify the conditions when an auto-acknowledgement should be sent to an incoming email.
 1. From the list in the Key field, select a key for the auto-acknowledge rule you are creating.
 2. From the list in the Operator field, select an operator for the auto-acknowledge rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the auto-acknowledge rule you are creating.
8. Repeat step 7 for each condition you want to add to the rule.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.
Note: If **And** is selected, every condition defined must be evaluated as true in order for the rule to be used. If **Or** is selected, the rule will be applied if any of the conditions contained in it are evaluated as true. Conditions are evaluated in the order that they are listed.
10. From the list in the Category field, select the template category that contains the template you want to use for your auto-acknowledgement.
11. From the Template field, select the template you want to use for your auto-acknowledgement.
12. Click **Create**.

The Email Processing Rules page refreshes and the new auto-acknowledge rule is displayed in the summary view table.

Related Topics:

- Creating Classification Rules, page 6-54
- Creating Auto-Delete Rules, page 6-56
- Creating Auto-Processing Rules, page 6-59
- Creating Auto-Redirect Rules, page 6-61
- Creating Auto-Reply Rules, page 6-62
- Creating Document Retrieval Rules, page 6-64
- Creating Routing Rules, page 6-66
- Modifying Processing Rules, page 6-67
- Deleting Processing Rules, page 6-68

Creating Auto-Processing Rules:

Auto-processing rules define the processing actions that are automatically performed on incoming emails. Such actions include creating service requests, creating leads, or executing a custom procedure.

Use the following steps to create an auto-processing rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Processing.
The Create Auto-Processing Rule page appears.
4. In the Name field, type a name for the auto-processing rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-processing rule.

6. If you want the auto-processing rule to apply to all incoming emails, click the All Emails box.
7. If you want your auto-processing rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-processing rule should be applied to an incoming email.
 1. From the list in the Key field, select a key for the auto-processing rule you are creating.
 2. From the list in the Operator field, select an operator for the auto-processing rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the auto-processing rule you are creating.
8. From the list in the Action field, select the action you would like your auto-processing rule to perform.

Note: Each action other than "Execute Custom Workflow/Procedure" can only be selected once. For example, you can execute multiple customized procedures, but you cannot create a service request twice.

9. From the list in the Parameter field, select or input the parameter you want to use with your previously selected action.
10. Optionally, repeat steps 7-9 for each condition you want to add to the rule.
11. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

Note: If **And** is selected, every condition defined must be evaluated as true in order for the rule to be used. If **Or** is selected, the rule will be applied if any of the conditions contained in it are evaluated as true. Conditions are evaluated in the order that they are listed.

12. Click **Create**.

The Email Processing Rules page refreshes and the new auto-processing rule is displayed in the summary view table.

Related Topics:

- Creating Classification Rules, page 6-54
- Creating Auto-Delete Rules, page 6-56
- Creating Auto-Acknowledge Rules, page 6-57
- Creating Auto-Redirect Rules, page 6-61
- Creating Auto-Reply Rules, page 6-62
- Creating Document Retrieval Rules, page 6-64
- Creating Routing Rules, page 6-66
- Modifying Processing Rules, page 6-67

- Deleting Processing Rules, page 6-68

Creating Auto-Redirect Rules:

Auto-redirect rules enable you to redirect the incoming email to another Oracle Email Center account or an external email address.

Use the following steps to create auto-redirect rules.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Redirect.
The Create Auto-Redirect Rule page appears.
4. In the Name field, type a name for the auto-redirect rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-redirect rule.
6. From the Action list, select whether you want to redirect emails to an internal or external address, and click **Go**.
7. If you want the auto-redirect rule to apply to all incoming emails, click the All Emails box.

Note: If you check the All Emails box, you do not need to provide conditions for the auto-redirect rule. If the All Emails box is checked, any conditions for that rule will be ignored.

8. If you want your auto-redirect rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-redirect rule should be applied to an incoming email.
 1. From the list in the Key field, select a key for the auto-redirect rule you are creating.
 2. From the list in the Operator field, select an operator for the auto-redirect rule you are creating.

3. From the list in the Value field, search for and select, or type a value for the auto-redirect rule you are creating.
9. Optionally, repeat the previous step for each condition you want to add to the rule.
Be sure to select how you want the conditions joined together from the Rule Chaining list.
10. For redirects to external accounts:
 1. In the Email Address field, type the address to which you want to redirect incoming email.
 2. From the Category list, select the template category containing the template to be used as the message body for the redirected email message.
 3. From the Template list, select the template you want to use as the message body for the redirected email message.
11. For redirects to internal accounts, from the Email Address list, select the account to which you want to redirect the message.
12. Click **Create**.
The Email Processing Rules page refreshes and the new auto-redirect rule is displayed in the summary view table.

Related Topics:

- [Creating Classification Rules, page 6-54](#)
- [Creating Auto-Delete Rules, page 6-56](#)
- [Creating Auto-Acknowledge Rules, page 6-57](#)
- [Creating Auto-Processing Rules, page 6-59](#)
- [Creating Auto-Reply Rules, page 6-62](#)
- [Creating Document Retrieval Rules, page 6-64](#)
- [Creating Routing Rules, page 6-66](#)
- [Modifying Processing Rules, page 6-67](#)
- [Deleting Processing Rules, page 6-68](#)

Creating Auto-Reply Rules:

Auto-reply rules allow you to determine whether you want to automatically reply to an incoming email using a specified document.

Use the following steps to create an auto-reply rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.

The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Reply.

The Create Auto-Reply Rule page appears.
4. In the Name field, type a name for the auto-reply rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-reply rule.
6. If you want the auto-reply rule to apply to all incoming emails, click the All Emails box.

Note: If you check the All Emails box, you do not need to provide conditions for the auto-reply rule. If the All Emails box is checked, any conditions for that rule will be ignored.
7. If you want your auto-reply rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-reply rule should be applied to an incoming email.
 1. From the list in the Key field, select a key for the auto-reply rule you are creating.
 2. From the list in the Operator field, select an operator for the auto-reply rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the auto-reply rule you are creating.
8. In the Action area, use the Category, Document, and Insert/Attach fields to specify the category and document you want to include, as well as how the document should be included with the reply.
 1. From the list in the Category field, select the MES category that contains the document you want to use.
 2. From the list in the Document field, select the document you want to use for your auto-reply.
 3. From the list in the Insert/Attach field, select whether you want to insert the document into the body of the reply, or attach it to the reply.
9. Click **Create**.

The Email Processing Rules page refreshes and the new auto-reply rule is displayed in the summary view table.

Related Topics:

- Creating Classification Rules, page 6-54

- Creating Auto-Delete Rules, page 6-56
- Creating Auto-Acknowledge Rules, page 6-57
- Creating Auto-Processing Rules, page 6-59
- Creating Auto-Redirect Rules, page 6-61
- Creating Document Retrieval Rules, page 6-64
- Creating Routing Rules, page 6-66
- Modifying Processing Rules, page 6-67
- Deleting Processing Rules, page 6-68

Creating Document Retrieval Rules:

Document retrieval rules allow you to determine whether you want the response document retrieval process to be based on matching keywords extracted from the incoming email to the keywords in documents stored in the Knowledge Base repositories, or based on a mapping of the incoming email to a specific category in Marketing Encyclopedia System (MES).

Use the following steps to create a document retrieval rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.
The Create Document Retrieval Rule page appears.
4. In the Name field, type a name for the document retrieval rule you are creating.
5. Optionally, in the Description field, type a short description for the document retrieval rule.
6. From the Retrieval Method list, select the method by which you want to retrieve documents and click **Go**.
7. If you want the document retrieval rule to apply to all incoming emails, click the All Emails box.

Note: If you check the All Emails box, you do not need to provide conditions for the document retrieval rule. If the All Emails box is checked, any conditions for that rule will be ignored.

8. If you want your document retrieval rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the document retrieval rule should be applied to an incoming email.
 1. From the list in the Key field, select a key for the document retrieval rule you are creating.
 2. From the list in the Operator field, select an operator for the document retrieval rule you are creating.
 3. From the list in the Value field, search for and select, or type a value for the document retrieval rule you are creating.
9. If you selected **Keyword Matching** as your retrieval method:
 1. Select the repository you want to search.

You can select to search MES, Knowledge Management, or both.
 2. Select to search all categories within the chosen repository, or search for and select individual categories within the chosen repository.

Note: The All Categories option refers ONLY to all MES categories. It does not apply to categories in the Knowledge Management system.

10. If you selected **MES Category Mapping** as your retrieval method:
 1. Search for and select the appropriate MES Category.
 2. Click **Apply**.
11. Click **Create**.

The Email Processing Rules page refreshes and the new document retrieval rule is displayed in the summary view table.

Related Topics:

- Creating Classification Rules, page 6-54
- Creating Auto-Delete Rules, page 6-56
- Creating Auto-Acknowledge Rules, page 6-57
- Creating Auto-Processing Rules, page 6-59
- Creating Auto-Redirect Rules, page 6-61
- Creating Auto-Reply Rules, page 6-62
- Creating Routing Rules, page 6-66
- Modifying Processing Rules, page 6-67
- Deleting Processing Rules, page 6-68

Creating Routing Rules:

Routing rules allow you to designate rules for routing incoming emails to the original agent, or a specified group of agents.

To ensure that every email is processed, by default an email will get routed to all agents assigned to that email account if:

- The administrator does not associate any routing rule to that email account OR
- All the routing rules assigned to that account fail.

Use the following steps to create a routing rule.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the + sign icon corresponding to Routing.
The Create Route page appears.
4. In the Name field, type a name for the routing rule you are creating.
5. Optionally, in the Description field, type a short description for the routing rule.
6. From the Route Type list, select **Static** or **Dynamic**, and click **Go**.
Static routes are based on specific criteria you designate using conditions (key/operator/value).
Dynamic routes are based on criteria Email Center does not know out of the box. For example: if you wanted to route incoming emails to a "Gold" account based on revenue statistics which exist in some customized table or external system, you can write a procedure that determines the value parameter by which the email would be routed to the "Gold" account or not.
7. If you selected **Static**, the Create Route page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
 1. If you want the routing rule to apply to all incoming emails, click the All Emails box.

Note: If you check the All Emails box, you do not need to provide conditions for the routing rule. If the All Emails box is checked, any conditions for that rule will be ignored.

2. If you want your routing rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the routing rule should be applied to an incoming email.
8. If you selected **Dynamic**, the Create Route page refreshes to display a procedure area where you can define the procedure name and variables you want to use.
 1. In the procedure Name field, type a name for the procedure you will use for your routing rule.
 2. In the list in the OUT Parameter Type field, select the data type you want to use for your routing rule.
 3. From the list in the Operator field, select an operator for the routing rule you are creating.
 4. From the list in the Value field, search for and select, or type a value for the routing rule you are creating.
9. Click **Create**.

Related Topics:

- [Creating Classification Rules, page 6-54](#)
- [Creating Auto-Delete Rules, page 6-56](#)
- [Creating Auto-Acknowledge Rules, page 6-57](#)
- [Creating Auto-Processing Rules, page 6-59](#)
- [Creating Auto-Redirect Rules, page 6-61](#)
- [Creating Auto-Reply Rules, page 6-62](#)
- [Creating Document Retrieval Rules, page 6-64](#)
- [Modifying Processing Rules, page 6-67](#)
- [Deleting Processing Rules, page 6-68](#)

Modifying Processing Rules:

Use the following steps to modify a processing rule in Email Center.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Email Processing Rules by Type column, click the expand icon for the rule type containing the rule you want to modify.
The summary view table refreshes to display all existing rules for the selected type.
4. In the Email Processing Rules by Type column, click the rule name for the specific rule you want to modify.
The Update page appears for the selected rule.
5. Modify the information in the provided fields as appropriate.
6. Click **Update**.
The modifications to the selected rule are saved.

Related Topics:

- [Creating Classification Rules](#), page 6-54
- [Creating Auto-Delete Rules](#), page 6-56
- [Creating Auto-Acknowledge Rules](#), page 6-57
- [Creating Auto-Processing Rules](#), page 6-59
- [Creating Auto-Redirect Rules](#), page 6-61
- [Creating Auto-Reply Rules](#), page 6-62
- [Creating Document Retrieval Rules](#), page 6-64
- [Creating Routing Rules](#), page 6-66
- [Deleting Processing Rules](#), page 6-68

Deleting Processing Rules:

Use the following steps to delete a processing rule in Email Center.

Note: Deleting a rule will automatically remove any associations to email accounts that rule may have.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. From the side panel, click **Processing Rules**.
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Email Processing Rules by Type column, click the expand icon for the rule type containing the rule you want to delete.
4. In the Add/Delete column, click the trash can icon for the rule you want to delete.
The selected rule is deleted and you receive a confirmation note stating that the rule has been deleted successfully.

Related Topics:

- [Creating Classification Rules](#), page 6-54
- [Creating Auto-Delete Rules](#), page 6-56
- [Creating Auto-Acknowledge Rules](#), page 6-57
- [Creating Auto-Processing Rules](#), page 6-59
- [Creating Auto-Redirect Rules](#), page 6-61
- [Creating Auto-Reply Rules](#), page 6-62
- [Creating Document Retrieval Rules](#), page 6-64
- [Creating Routing Rules](#), page 6-66
- [Modifying Processing Rules](#), page 6-67

Intents

The Intent pages allows you to turn intent processing on or off for each account, and view the existing intents for each account.

Oracle Email Center utilizes strings of keywords extracted from incoming emails to decipher the intent of the email message or the broad area pertaining to the email and assists the agent in the selection of appropriate responses.

The keywords extracted from every incoming email are matched with keywords stored in the Email Center schema to identify the intent of the email and fetch corresponding responses. Every intent and suggested response document is assigned a score (percentage) based on the scores of the keywords identified in the incoming email. Oracle Email Center can identify multiple intents in an email and multiple responses for each intent, thereby enabling Email Center Agent to handle multi-issue emails in a single response.

To enable the Email Center Intent engine, you must create "intents" pertaining to the business. You should gather sample question and response emails for each of the intents. To train or build the intent engine, you then simply send the sample emails to the "intent" account.

Keywords are extracted from these sample messages, scored and stored in the Email Center schema for the specified intent. The scoring of important keywords has been improved such that keywords that are unique to an intent and occur most frequently will

be assigned the highest scores. Equally, if a keyword appears across multiple intents or is not used frequently, will have a lower score.

Intent creation tips:

Think about the key words that you want to be associated with the Intent:

- Consider the variations on these words/phrases that customers may use.
- Consider the words or phrases that distinguishes one intent from another.
- Avoid including signature files in the sample question and response emails as the contents will be processed and Keywords that are irrelevant to the Intent may be generated.
- Do not "forward" sample emails and sample responses to the Intent account.
- Avoid Company names, logos, acronyms, etc. in the sample question and response emails.
- Do not include Greetings (e.g. Dear Sir) and Signatures (e.g. Best Regards, Joe Smith) in the sample question and response emails.
- Do not include specific codes or numbers, for example: product codes, sizes, telephone numbers, order numbers unless they uniquely identify an intent.
- Send multiple versions of the sample question and response emails repeating the important keywords and phrases. This will enable the system to increase the scores of the keywords.
- Try to create multiple intent with smaller sets of keywords as compared to creating only a few intents with a large number of keywords.

Tasks

You can perform the following tasks:

- Viewing Intent Details, page 6-70
- Modifying an Intent Name or Email Account, page 6-71
- Deleting an Intent, page 6-73
- Deleting an Intent Keyword, page 6-72
- Setting Intent Processing Options, page 6-74

Viewing Intent Details:

Use this procedure to view Email Center intent details and their keywords and scores.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents**.

The Intents page appears.

3. From the list in the Email Account field, select the email account for which you want to view intents and click **Go**.

The Intents page refreshes to display the existing intents that are associated with the selected email account.

The Invalid Keywords column indicates that there are no keywords of Question and Response type with positive scores.

If a red check box appears with the intent name, this is an indication that the intent contains sets of invalid keywords. There can be several reasons why an intent becomes invalid. Such as:

1. Only one set of keywords (Query or Response) is created for the intent. To make intent processing work, you should have a set of keywords for both query and for response.
2. All keyword from either group (query or response) has score <0. Intent processing require at least one keyword in the group with score >0.
4. If you want to view the keywords and scores for the intent, in the Keyword column, click the keywords icon (glasses).

The Keywords page appears, displaying a list of all the keywords for the selected email account and intent.

Related Topics:

- Modifying an Intent Name or Email Account, page 6-71
- Deleting an Intent, page 6-73
- Deleting an Intent Keyword, page 6-72
- Setting Intent Processing Options, page 6-74

Modifying an Intent Name or Email Account:

You can update the name of an intent or update the email account associations of an intent. You update the account associations of an intent by transferring an intent from one email account to another email account. However, if you want the same intent across multiple accounts, you must send the intent email to each account.

Use this procedure to update intents.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents**.
The Intents page appears.
3. From the list in the Email Account field, select the email account for which you want to modify intents and click **Go**.
The Intents page refreshes to display the existing intents that are associated with the selected email account.
4. In the Name column, click the intent name hyperlink of the intent you want to update.
The Update Intent page appears.
5. If you want to update the name of the intent, in the Name field, type the new name for the intent.
6. If you want to update the email account association for the intent, from the Email Account list, select the email account to which you want to transfer the intent.
Note: Only email accounts with the same language are displayed in the drop-down list.
7. If you want to save your work and update the intent, click **Update**.
8. If you do not want to save your work and want to reset all the field values to the last saved values, click **Cancel**.

Related Topics:

- Viewing Intent Details, page 6-70
- Deleting an Intent, page 6-73
- Deleting an Intent Keyword, page 6-72
- Setting Intent Processing Options, page 6-74

Deleting Keywords From an Intent:

Use this procedure to remove keywords for an intent.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents**.
The Intents page appears.
3. From the list in the Email Account field, select the email account containing the intent from which you want to remove keywords and click **Go**.
The Intents page refreshes to display the existing intents that are associated with the selected email account.
4. In the Keyword column, click the keywords icon (glasses).
The Keywords page appears, displaying a list of all the keywords for the selected email account and intent.
5. In the Select column, select the box(es) for the keyword(s) you want to delete.
6. If you want to delete all of the intents, click the **Select All** hyperlink.
7. If you want to deselect the selected boxes, click the **Select None** hyperlink.
8. Click **Delete**.
The selected keywords are removed from the intent.

Related Topics:

- Viewing Intent Details, page 6-70
- Modifying an Intent Name or email Account, page 6-71
- Deleting an Intent, page 6-73
- Setting Intent Processing Options, page 6-74

Deleting an Intent:

Use this procedure to delete intents.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents**.
The Intents page appears.
3. From the list in the Email Account field, select the email account to which the intent you want to delete is associated and click **Go**.
The Intents page refreshes to display the existing intents that are associated with the selected email account.
4. If you want to individually select the intent(s) to delete, in the Select column, select the box(es) next to the intent(s) you want to delete.
5. If you want to delete all of the intents, click the **Select All** hyperlink.
6. If you want to deselect the selected boxes, click the **Select None** hyperlink
7. Click **Delete**.

Related Topics:

- Viewing Intent Details, page 6-70
- Modifying an Intent Name or email Account, page 6-71
- Deleting an Intent Keyword, page 6-72
- Setting Intent Processing Options, page 6-74

Setting Intent Processing Options:

You can set the number of intents with pre-fetched responses (the number of intents for which suggested responses will be fetched as part of the email processing) and enable or disable the use of Oracle Text in analyzing the content of incoming email messages sent to your email accounts. If you do not wish to have the Email Center intent processing performed on the incoming email messages for a particular email account, you can disable the intent analysis processing for that email account. If intent analysis processing does not occur, your agents are not automatically presented with suggested response documents when responding to email messages.

Note: By default, intent processing is disabled for all email accounts.

Use this procedure to set intent processing options.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Intents > Options**.
The Options page appears.
3. If you want to set the number of intents with pre-fetched responses, from the list in the Number of Intents with pre-fetched responses field, select a number between 1 and 10. Oracle recommends that you start with 3.
4. If you want to enable intent processing for an email account, do one of the following.
 1. From the list in the Disabled Email Accounts field, double click to select the account(s) that you want to enable.
 2. From the Disabled Email Accounts list, select the account(s) that you want to enable and then click **Move**.
Note: You can select multiple account by holding down the Shift key or the Ctrl key as you click each account.
5. If you want to enable intent processing for all disabled email accounts, click **Move All**.
6. If you want to disable intent processing for an email account, from the Enabled Email Accounts list, select the account(s) that you want to disable and then click **Remove**.
Note: You can select multiple account by holding down the Shift key or the Ctrl key as you click each account.
7. If you want to disable intent processing for all enabled email accounts, click **Remove All**.
8. Click **Apply**.

Related Topics:

- Viewing Intent Details, page 6-70
- Modifying an Intent Name or email Account, page 6-71
- Deleting an Intent, page 6-73
- Deleting an Intent Keyword, page 6-72

Tags

A "tag" is a data item that is appended to an outbound email by Oracle Email Center. The process of appending a sequence of one or more "tags" to an outbound email and extracting the same from an incoming email is referred to as "tagging". A unique identifier is assigned to the sequence of tags appended to every email.

A tag can be of two of types:

System Tags - This consists of the following system related data items that are appended to every outbound email:

- Customer ID and Contact ID - Used to automatically identify the customer and contact sending the email
- Agent ID - Used to automatically route the customer reply back to the same agent
- Interaction ID - Used to thread or link related email interactions
- Service Request Number - Used to automatically update the Service Request
* Lead Number

Custom Tags - An administrator can also define "custom" tags pertaining to the implementation. These custom tags could be of the following types:

- Fixed - The value for the tag is provided by the administrator at the time of creation
- Query - The value of the tag is obtained by executing the associated SQL query at runtime
- Procedure - The value of the tag is obtained by executing the associated PL/SQL procedure at runtime

A "custom" tag is not appended to an outbound email unless and until the customer tag is associated with the email account from which the email is sent out.

Email Center currently appends the cryptic tagging ID at the end of the subject enclosed within "[RE:]". When a customer replies back to an email generated by Email Center, the tags are extracted from the incoming email and the data is used for various automated processing actions (as detailed above for the "system" tags). The tags are also made available as "keys" for defining email processing rules.

For more information on tags, see the Tags , page 2-32topic in the Concepts section.

Tasks

You can perform the following tasks:

- Creating an Email Tag, page 6-76
- Modifying an Email Tag, page 6-77
- Deleting an Email Tag, page 6-78

Creating an Email Tag:

Use this procedure to create custom tags.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Tags**.
The Tags page appears.
3. Click **Create**.
The Create Tag page appears.
4. In the Tag ID field, type a unique identifying name for the custom tag that you want to create. This tag ID is used internally by Email Center.
5. In the Tag Name field, type a name for the custom tag that you want to create. This tag name is visible in other Self Service Administration Console pages.
6. From the Type field, select the type of key you want to define for the tag.
The key types are:
 - Fixed - Fixed key types have a fixed value. For example if domain is 'oracle.com'.
 - Procedure - Procedure key types allow you to assign a value to the key as determined by the result of a procedure call.
 - Query - The value assigned to the key comes from a SQL statement or a query.
7. In the Value field, type the value of the key.
8. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.
9. If you want to save your work and continue to create the custom tag, click **Create**.
Note: When you are using the Create Tag page to create a new custom tag, then the Account Association page appears after you click **Create**, so that you can continue the process of setting up custom tags.

Related Topics::

- [Modifying an Email Tag, page 6-77](#)
- [Deleting an Email Tag, page 6-78](#)

Modifying an Email Tag:

Use this procedure to update custom tags.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Tags**.
The Tags page appears.
3. In the Name column, click the tag name hyperlink of the tag you want to update.
The Update Tag page appears.
4. If you want to update the tag name, in the Tag Name field, type a name for the tag that you want to update.
5. If you want to update the type of key, from the Type field, select the type of key you want to define for the tag.
6. If you want to update the value for the key, in the Value field, type the value of the key.
7. If you want to save your work and update the custom tag, click **Update**.

Related Topics::

- [Creating an Email Tag, page 6-76](#)
- [Deleting an Email Tag, page 6-78](#)

Deleting an Email Tag:

Use this procedure to delete custom tags.

Prerequisites

If the custom tag is used in a processing rule, the processing rule must be updated to remove the custom tag key in the rule before you delete the custom tag.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Tags**.
The Tags page appears.
The Tags page appears displaying all of the tags that have been defined for your Email Center system.
3. If you want to individually select the tag(s) to delete, in the Select column, select the box(es) next to the tag(s) you want to delete.
4. If you want to delete all of the tags, click the **Select All** hyperlink.

5. If you want to delete the selected tag(s), click **Delete**.
6. If you want to deselect the selected boxes, click the **Select None** hyperlink

Related Topics::

- [Creating an Email Tag, page 6-76](#)
- [Modifying an Email Tag, page 6-77](#)

Custom Dictionary

You can use the Custom Dictionary page to add words that are specific to your company or business, such as: company name, address, product names, common acronyms, etc. You can also use this page to remove words from the custom dictionary.

Tasks

You can perform the following tasks:

- [Adding Words to the Custom Dictionary, page 6-79](#)
- [Removing Words From the Custom Dictionary, page 6-80](#)

Adding Words to the Custom Dictionary:

Use the steps below to add words to your custom dictionary.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Custom Dictionary**.
The Custom Dictionary page appears.
3. In the Add Words field, type the word(s) you want to add to the custom dictionary.
Note: If you are typing multiple words to be entered, each word must be separated by a comma.
4. Click **Add**.
The Custom Dictionary page refreshes to add the words to the dictionary.

Removing Words From the Custom Dictionary :

Use the steps below to remove words from your custom dictionary.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Custom Dictionary**.
The Custom Dictionary page appears.
3. In the Remove Words field, select the word(s) you want to remove from the custom dictionary.

Note: You can select more than one word by using the Shift or Ctrl keys in conjunction with your left mouse button.

4. Click **Remove**.
The Custom Dictionary page refreshes to remove the selected words from the custom dictionary.

Archive/Purge

Every incoming and outgoing email is stored in one of the system folders in Email Center (Resolved, Deleted, and Sent).

Agents can view these stored emails either by performing a message search or via Oracle Customer Interaction History. However as the size of the system folders increases, the performance of the message search process deteriorates. Administrators need the ability to reduce this file size.

You can use this page to periodically archive or purge these system folders. While archiving will create a separate system folder and move email messages that match the criteria to it, purging will permanently delete the email messages the match the criteria.

Tasks

You can perform the following tasks:

- Viewing Existing Requests, page 6-81
- Creating an Archive Request, page 6-81
- Creating a Purge Request, page 6-82

- Resubmitting a Failed Request, page 6-84
- Canceling a Request, page 6-84
- Deleting the Archive, page 6-85

Viewing Existing Requests:

Use the steps below to submit an archive request.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Archive / Purge**.

The Archiving and Purging Requests page appears, displaying a list of all pending and successful requests.

Related Topics:

- Creating an Archive Request, page 6-81
- Creating a Purge Request, page 6-82
- Resubmitting a Failed Request, page 6-84
- Canceling a Request, page 6-84
- Deleting the Archive, page 6-85

Creating an Archive Request:

Use the steps below to submit an archive request.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Archive / Purge > Submit Request**.
The Archiving and Purging page appears.
3. From the Account list, select the email account containing the emails you want to archive.
Note: You can select an individual email account or select to archive emails from ALL email accounts.
4. From the Folder list, select the system folder containing the emails you want to archive.
Note: You can select an individual system folder or select to archive emails from ALL system folders.
5. In the Before This Date field, use the date picker (calendar icon) to select the cut off date for your archive.
This is the date past which email will not be included in your archive. All emails up to the selected date will be included in the archive.
6. Click **Go**.
The Archiving and Purging page refreshes to display the selected email account(s) and folder(s).
7. From the Select column, select the box(es) for the folder(s) you want to archive.
8. Click **Archive**.
The Archiving and Purging Requests page appears, displaying your request in the Pending Requests area. You also receive a confirmation that your request has been successfully submitted.
Note: To complete this the process, you must ensure the Email Center Archiving/Purging concurrent program is scheduled to process archiving and purging requests.

Related Topics:

- Viewing Existing Requests, page 6-81
- Creating a Purge Request, page 6-82
- Resubmitting a Failed Request, page 6-84
- Canceling a Request, page 6-84
- Deleting the Archive, page 6-85

Creating a Purge Request:

Use the steps below to submit an purge request.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Archive / Purge > Submit Request**.
The Archiving and Purging page appears.
3. From the Account list, select the email account containing the emails you want to purge.
Note: You can select an individual email account or select to purge emails from ALL email accounts.
4. From the Folder list, select the system folder containing the emails you want to purge.
Note: You can select an individual system folder or select to purge emails from ALL system folders.
5. In the Before This Date field, use the date picker (calendar icon) to select the cut off date for your purge.
This is the date past which email will not be included in your purge. All emails up to the selected date will be included in the purge.
6. Click **Go**.
The Archiving and Purging page refreshes to display the selected email account(s) and folder(s).
7. From the Select column, select the box(es) for the folder(s) you want to archive.
8. Click **Purge**.
The Purge Confirmation page appears asking you if you are sure you want to purge emails from the selected account(s) and folder(s).
9. Click **Apply**.
The Archiving and Purging Requests page appears, displaying a confirmation that your request has been successfully submitted.
Note: To complete this the process, you must ensure the Email Center Archiving/Purging concurrent program is scheduled to process archiving and purging requests.

Related Topics:

- Viewing Existing Requests, page 6-81
- Creating an Archive Request, page 6-81
- Resubmitting a Failed Request, page 6-84
- Canceling a Request, page 6-84
- Deleting the Archive, page 6-85

Resubmitting a Failed Request:

Use the steps below to resubmit a failed request.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Archive / Purge**.
The Archiving and Purging page appears, displaying all pending requests and all successful requests.
If a request has failed, The Status column will reflect this by displaying a **Failed** hyperlink.
3. In the Status column, click the **Failed** hyperlink to view details about the failed request.
4. Click **Submit** to resubmit the failed request.

Related Topics:

- Viewing Existing Requests, page 6-81
- Creating an Archive Request, page 6-81
- Creating a Purge Request, page 6-82
- Canceling a Request, page 6-84
- Deleting the Archive, page 6-85

Canceling a Request:

Use the steps below to cancel a submitted request.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.
2. In the side panel, click **Archive / Purge**.
The Archiving and Purging page appears, displaying a list of all pending requests and all successful requests.
3. From the Select column in the Pending Requests area, select the request you want to cancel.
4. Click **Cancel**.
The selected request is canceled.

Related Topics:

- Viewing Existing Requests, page 6-81
- Creating an Archive Request, page 6-81
- Creating a Purge Request, page 6-82
- Resubmitting a Failed Request, page 6-84
- Deleting the Archive, page 6-85

Deleting the Archive:

Use the steps below to delete emails from the Archive folder.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Steps

1. Click the **Administration** subtab.

2. In the side panel, click **Archive / Purge > Delete Archive**.
The Delete Archives page appears, displaying a list of archives.
3. In the Select column, click the box(es) for the archive(s) you want to delete.
4. Click **Delete**.
The Delete Confirmation page appears, asking you if you are sure you want to permanently delete the selected archive(s).
5. Click **Apply**.
You receive a confirmation that the selected archive(s) are successfully deleted and the archive status for the selected archive(s) changes to "Deleted".

Related Topics:

- Viewing Existing Requests, page 6-81
- Creating an Archive Request, page 6-81
- Creating a Purge Request, page 6-82
- Resubmitting a Failed Request, page 6-84
- Canceling a Request, page 6-84

Documents

Oracle Email Center (Email Center) uses the Marketing Encyclopedia System (MES) as its document repository. MES provides the administrator with the capability to organize documents into various categories (or folders).

Tasks

You can perform the following tasks:

- Searching for MES Documents, page 6-86
- Browsing the MES Document Categories, page 6-87
- Updating MES Documents, page 6-88
- Removing MES Documents, page 6-89
- Creating and Publishing MES Documents, page 6-90
- Uploading and Publishing MES Documents, page 6-91
- Creating a Category in MES, page 6-93
- Defining a Hierarchy Among the Categories, page 6-93

Searching for MES Documents:

Use the steps below to search for a particular MES document.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Document > Search**.
The Search Documents page appears.
3. In the Document Search Criteria field, type the name or partial name with a wildcard (%).
4. Click **Search**.
The Document Search Results table refreshed to display the results of the search.
5. To view a specific document, in the Title column, click the document title hyperlink.

Related Topics:

- Browsing the MES Document Categories, page 6-87
- Updating MES Documents, page 6-88
- Removing MES Documents, page 6-89
- Creating and Publishing MES Documents, page 6-90
- Uploading and Publishing MES Documents, page 6-91
- Creating a Category in MES, page 6-93
- Defining a Hierarchy Among the Categories, page 6-93

Browsing the MES Document Categories:

Use the steps below to browse the MES categories for a particular document.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Document > Browse**.
The Browse Documents page appears, displaying a summary view table of all the MES categories.
3. In the MES Category column, click the expansion icon to view sub-categories under a particular MES category (if applicable).
The summary view table expands to show the sub-categories for the selected MES category.
4. In the View column, click the appropriate icon to view the documents in a particular MES category or sub-category.
5. To view a specific document, in the Title column, click the document title hyperlink.

Related Topics:

- Searching for MES Documents, page 6-86
- Updating MES Documents, page 6-88
- Removing MES Documents, page 6-89
- Creating and Publishing MES Documents, page 6-90
- Uploading and Publishing MES Documents, page 6-91
- Creating a Category in MES, page 6-93
- Defining a Hierarchy Among the Categories, page 6-93

Updating MES Documents:

Use the steps below to update MES documents.

Note: You can only update documents that you published. You cannot update documents that have been published by other user names.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. Search or browse for the document you want to update by clicking **Document > Search** or clicking **Document > Browse** from the side panel.
3. In the Update column, click the update icon (pencil) for the document you want to update.

The Publish Document page appears.

4. Update the document title, description, category, or upload a new file as necessary.
5. Click **Update**.

The Publish Document page refreshes to display a confirmation message stating that the document was updated.

Related Topics:

- Searching for MES Documents, page 6-86
- Browsing the MES Document Categories, page 6-87
- Removing MES Documents, page 6-89
- Creating and Publishing MES Documents, page 6-90
- Uploading and Publishing MES Documents, page 6-91
- Creating a Category in MES, page 6-93
- Defining a Hierarchy Among the Categories, page 6-93

Removing MES Documents:

Use the steps below to remove a MES document you published.

Note: You can only delete documents that you published. You cannot delete documents that have been published by other user names.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.

2. Search or browse for the document you want to remove by clicking **Document > Search** or clicking **Document > Browse** from the side panel.
3. In the Select column of the table, select the box for the document you want to remove.
4. Click **Remove**.

The page refreshes to display a confirmation message stating that the selected document was deleted.

Related Topics:

- Searching for MES Documents, page 6-86
- Browsing the MES Document Categories, page 6-87
- Updating MES Documents, page 6-88
- Creating and Publishing MES Documents, page 6-90
- Uploading and Publishing MES Documents, page 6-91
- Creating a Category in MES, page 6-93
- Defining a Hierarchy Among the Categories, page 6-93

Creating and Publishing MES Documents:

Use the steps below to create and publish a document for MES by using the template editor.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Document > Editor**.
The Create Document page appears.
3. In the Title field, type a name for your document.
4. In the Description field, provide a short description of the document.
5. In the Category field, search for and select the appropriate MES category in which you want to create your document.

6. Optionally, in the Query Name field, search for and select the query you want to use with your document.
7. Click the hypertext link above the Template Body field to switch from plain text mode to rich text mode.

Rich text mode allows you to format the font of the email, and include an image or hyperlink in the email.
8. In the Template Body field, type the desired document content. Optionally, you can include the following in the document's content:
 - One or more standard merge fields by selecting a value from the Standard Merge Field list and clicking **Insert**.
 - One or more custom merge fields by entering a value in the Custom Merge Field text field and clicking **Insert**.
9. To preview the document before you publish it, click **Preview**.
10. To Spell check your document content, click the **Spell Check** hyperlink.
11. Click **Publish**.

Note: If you want to make your merge field(s) required, select the Required option for the appropriate type of merge field.

A conformation message appears, stating that you successfully published the document.

Related Topics:

- Searching for MES Documents, page 6-86
- Browsing the MES Document Categories, page 6-87
- Updating MES Documents, page 6-88
- Removing MES Documents, page 6-89
- Uploading and Publishing MES Documents, page 6-91
- Creating a Category in MES, page 6-93
- Defining a Hierarchy Among the Categories, page 6-93

Uploading and Publishing MES Documents:

Use the steps below to import and publish a document for MES.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. On the side panel, click **Document > Publish**.
The Publish Document page appears.
3. In the Title field, type a title for the document you are going to upload.
4. In the Description field, provide a short description of the document.
5. In the Category field, search for and select the appropriate MES category for your document.
6. Click **Upload File**.
The Upload File browse box appears.
7. In the Upload File browse box, click **Browse**, search for and select the file you want to upload.
8. Click **Upload**.
The Publish Document page refreshes and the selected file appears in the Files field.
9. Click **Publish**.
A confirmation message is displayed, stating that the new document has been published.

Note: If the documents loaded into MES will be used as suggested responses, a concurrent process needs to be run in order to rebuild the Oracle Text index for MES. Log in as the Email Center Concurrent Program Administrator user in the forms application, and submit a request to run the Rebuild Help Search Index concurrent process.

To publish another document you must start by clicking the Publish hyperlink in the side panel again. Do not try to use (re-cycle) data entered for a previous file.

Related Topics:

- Searching for MES Documents, page 6-86
- Browsing the MES Document Categories, page 6-87
- Updating MES Documents, page 6-88
- Removing MES Documents, page 6-89
- Creating and Publishing MES Documents, page 6-90
- Creating a Category in MES, page 6-93
- Defining a Hierarchy Among the Categories, page 6-93

Creating a Category in MES:

The Category Manager page allows you to create and maintain categories.

Use the steps below to add new MES categories.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Document > Categories**.
The Category Manager page appears.
3. If no blank rows are available, click **Add Row(s)** and, when prompted, type the number of new rows you want to add and click **OK**.
4. In the provided fields, type the name of the new category, a description of it, and select its parent category.
5. Click **Update**.

Guidelines

Read the content of the latest IEM readme and HTML file for important information about new features, post installation steps and other changes introduced with the release.

Related Topics:

- Searching for MES Documents, page 6-86
- Browsing the MES Document Categories, page 6-87
- Updating MES Documents, page 6-88
- Removing MES Documents, page 6-89
- Creating and Publishing MES Documents, page 6-90
- Uploading and Publishing MES Documents, page 6-91
- Defining a Hierarchy Among the Categories, page 6-93

Defining a Hierarchy Among the Categories:

The Category Manager allows you to create and maintain the hierarchies of categories.

Use the steps below to create a hierarchy of MES categories.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Categories**.
The Category Manager page appears, displaying a list of categories.
3. In the Category Name column, select the row, which displays the appropriate sub-category name.
4. From the list in the Parent Category column for that row, select the desired parent category.
Note: If you want your category to be at the highest level of the hierarchy, select **None** as the parent category.
5. Click **Update**.

Related Topics:

- Searching for MES Documents, page 6-86
- Browsing the MES Document Categories, page 6-87
- Updating MES Documents, page 6-88
- Removing MES Documents, page 6-89
- Creating and Publishing MES Documents, page 6-90
- Uploading and Publishing MES Documents, page 6-91
- Creating a Category in MES, page 6-93

Queries

Use the Query subtab to set up and maintain queries.

Tasks

You can perform the following tasks:

- Viewing Queries, page 6-95
- Creating Queries, page 6-95

Viewing Queries:

Use this procedure to view an existing query.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the side panel, click **Query**.
The Query List page appears.
3. You can use the Query Name search feature to narrow down the list of queries. Type the full name or partial name with a wildcard (%) of the query you want to view and click **Go**.
4. In the Query Title column, click the query name hyperlink of the query you want to view.
The Query Details page appears.
5. Click **Back** when you have finished viewing the selected query.

Related Topics:

- Creating Queries, page 6-95

Creating Queries:

Use this procedure to create a query.

Prerequisites

None

Login

HTML Login URL

Responsibility

Email Center Self Service Setup or Email Center Supervisor

Steps

1. If you are logging in with the Email Center Self Service Setup responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.
2. From the Side panel, click **Query > Create**.
The Create Query page appears.
3. In the Query Title field, type a unique name for the query that you want to create (maximum allowable characters = 50).
4. Optionally, in the Query Description field, type any free-form text that you want to use to describe the query that you are creating (maximum allowable characters = 255).
5. In the Query String field, type the SELECT statement for the query (maximum allowable characters = 4000).

Note: The alias for each column used in the SELECT statement must match the merge field name and must be enclosed within the valid merge field delimiters. To assist in this process, Email Center allows you to insert SQL merge fields. Do not end the query with a semicolon (;) or slash (/).

For example, if the document had following merge fields:

Dear ((*FIRST_NAME*)) ((*LAST_NAME*)),

Thank you for your interest in ((*PRODUCT*)). This product will be released on ((*DATE*)).

The query to populate these fields would have the following SELECT statement:

```
SELECT CUSTOMER_FIRST_NAME "((*FIRST_NAME*))",  
CUSTOMER_LAST_NAME "((*LAST_NAME*)) ",  
PRODUCT_NAME "((*PRODUCT*)) ",  
RELEASE_DATE "((*DATE*)) "  
FROM PRODUCTS_RELEASE_TABLE  
WHERE PRODUCT_ID =: PID
```

Note: Ensure that the SQL query is written such that a default value is returned if the query returns no data, otherwise the template/response document cannot be used.

Note: The result of the query must be non-null and unique.

6. In the SQL Merge Field field, type the name of the merge field and click **Insert**.
An alias name for the column that matches the merge field is inserted at the end of the text in the Query String Editor.

Note: When typing a SQL merge field, you must use all capital letters. While no white spaces are allowed, you can use numerals and underscores (_).

Note: Since the functionality to insert merge fields cannot recognize the current cursor position in the Query String editor, the merge field always gets inserted at the end of the statement. Therefore, Oracle recommends that you insert the merge fields immediately after typing the corresponding column name.

Bind variables are used within the WHERE clause of the SQL statements to restrict the result set extracted from the database. In the above example "PID" is a bind variable. Bind variables must be entered exactly as shown above (with column name followed by the "=" operator and then the bind variable name).

When the user selects a document that includes bind variables, he/she will be prompted to enter values for the bind variables entered in the WHERE clause unless the bind variable is a "standard" merge field itself. In which case the bind variable will be populated automatically. The SQL query will get executed using the value for the bind variable when the associated document is previewed, inserted or attached.

7. Click **Validate SQL**.

You will be prompted to enter a value for the bind variables used in the query, if any.

8. Enter a random numeric or varchar value (depending on the data type of the corresponding column) for the bind variable, and click **Validate SQL**.

Note: Varchar values must be enclosed in single quotes (').

You receive a confirmation messages stating that the validation was successful and the prompt you created in the Query String field is added.

9. If you want to save your work and create the query, click **Create**.
10. If you do not want to save your work and want to clear all of the input fields, click **Clear**.

Related Topics:

- Viewing Queries, page 6-95

Resource Groups

Resource groups allow the assignment of multiple agents to an account without having to assign each agent individually.

The Email Center Self Service Administration console allows you to create resource groups, add agents to the resource groups, and search for resource groups by a variety of parameters.

Tasks

You can perform the following tasks:

- Viewing Resource Groups, page 6-98

- [Creating Resource Groups and Assigning Agents to Them](#), page 6-98
- [Assigning Agents to an Existing Resource Group](#), page 6-99
- [Removing Resource Groups](#), page 6-100
- [Removing Agents From a Resource Group](#), page 6-101
- [Searching for Resource Groups](#), page 6-101

Viewing Resource Groups:

You can use the Email Center Self Service Administration console to view all existing resource groups that have the Call Center usage assigned to them.

Use the following steps to view resource groups.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

none

Steps

1. Click the **Resource Groups** tab.
The Groups page appears, displaying a summary view table of all existing resource groups to which the Call Center group usage has been assigned.
2. If you want to view the details of a particular resource group, in the Group Name column, click the hyperlinked name of the resource group you want to view.
The Group Detail page appears for the selected resource group, displaying all of the group usages and agents assigned to that group.

Creating Resource Groups and Assigning Agents to Them:

The Email Center Self Service Administration console allows you to create resource groups. Resource groups allow the assignment of multiple agents to an account without having to assign each agent individually.

Use the following steps to create a resource group and assign agents to it.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

Ensure Email Center agents have been created.

Steps

1. Click the **Resource Groups** tab.
The Groups page appears.
2. In the Groups page, click **Create**.
The Create Group page appears.
3. In the Name field, type a name for the resource group you are creating.
4. Optionally, in the Description field, type a description of the resource group you are creating.
5. Optionally, in the Email field, type an email address for the resource group you are creating.
6. In the Start Date field, use the calendar tool to select a start date for your resource group.
7. Optionally, in the End Date field, use the calendar tool to select an end date for the resource group.
8. Optionally, in the Parent field, type the name of the resource group you want to use as a parent group.
9. From the list in the Usage column, select **Call Center** as the group usage.
You can assign multiple usages to the group, but the **Call Center** usage **MUST** be assigned.
10. From the list in the Category column, select **Employee**.
11. From the list in the Resource Name column, search for and select the name of the agent you want to assign to the resource group.
12. From the list in the Role Type column, select **Icenter**.
13. From the list in the Roles column, search for and select one of the following roles:
 - **Email Center Manager**
 - **Email Center Supervisor**
 - **Email Center Agent**
14. From the list in the Start Date column, use the calendar tool to select the appropriate start date.
15. Repeat steps 10-14 for each agent you want to assign to the resource group.
16. Click **Create**.
The resource group is created and the selected agents are assigned to it.

Assigning Agents to an Existing Resource Group:

Use the following steps to assign agents to an existing resource group.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

Ensure the Email Center agents and the resource groups have been created.

Steps

1. Click the **Resource Groups** tab.
The Groups page appears, displaying a summary view table of all existing resource groups to which the Call Center group usage has been assigned.
2. In the Group Name column, click the hyperlinked name of the resource group to which you want to assign agents.
The Group Detail page appears.
3. In the Members area, from the list in the Category column, select **Employee**.
4. From the list in the Resource Name column, search for and select the name of the agent you want to assign to the resource group.
5. From the list in the Role Type column, select **Icenter**.
6. From the list in the Roles column, search for and select one of the following roles:
 - **Email Center Manager**
 - **Email Center Supervisor**
 - **Email Center Agent**
7. From the list in the Start Date column, use the calendar tool to select the appropriate start date.
8. Repeat steps 3 -7 for each agent you want to assign to the resource group.
9. Click **Update**.
The selected agents are assigned to the resource group.

Removing Resource Groups:

Use the following steps to remove a resource group.

Note: While you cannot "remove" a resource group, you can use the end date feature to prevent the resource group from being active.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

none

Steps

1. Click the **Resource Groups** tab.

The Groups page appears, displaying a summary view table of all existing resource groups to which the Call Center group usage has been assigned.

2. In the Group Name column, click the hyperlinked name of the resource group you want to remove.

The Group Detail page appears.

3. In the End Date field for the resource group, use the calendar tool to select an appropriate end date.

4. Click **Update**.

The resource group will no longer be active once the selected end date occurs.

Removing Agents From a Resource Group:

Use the following steps to remove a resource group.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

none

Steps

1. Click the **Resource Groups** tab.

The Groups page appears, displaying a summary view table of all existing resource groups to which the Call Center group usage has been assigned.

2. In the Group Name column, click the hyperlinked name of the resource group from which you want to remove agents.

The Group Detail page appears.

3. In the Remove column of the Members area, select the box(es) for the agent(s) you want to remove from the resource group.

4. Click **Update**.

The selected agents are removed from the resource group.

Searching for Resource Groups:

Use the following steps to search for a resource group.

Login

HTML Login URL

Responsibility

Email Center Self Service Setup

Prerequisites

none

Steps

1. Click the Resource Groups tab.
2. From the side panel, click **Search**.
The Group Advanced Search page appears.
3. You can use any of the provided fields as filter criteria for your search.
Note: The more narrow or complete your search criteria is, the fewer and more accurate your results will be.
4. Click **Search**.
The Groups page appears, displaying the results of your search.

Integrating Oracle Email Center with Oracle E-Business Applications

This chapter covers the following topics:

- Service Request Enabling Email Center
- Creating or Updating Service Requests from the Message Component
- Automatically Updating Service Requests
- Lead Enabling Email Center
- Email Center Enabling Business Applications

Service Request Enabling Email Center

Oracle Email Center provides agents with the ability to create business objects such as a service request and at the same time provides message composing/viewing capabilities to the business users such that every email interaction is recorded and archived.

Agents can create these service requests from within the Message Component, while viewing and responding to an incoming email or composing a new outbound email. The number for the created service request is then included in the tag appended to the subject of the outbound email. If the customer replies back, then the service request number is extracted from the tag and the service request status is automatically updated using a previously defined value.

Creating or Updating Service Requests from the Message Component

By default this feature is turned OFF. If the customer intends to use this functionality, set the IEM: Integration: TeleService Enabled system profile to "YES". Refer to Section 5.6 for the steps to set system profile options. Once this system profile is set to "YES", a "Service Request" container is displayed in the Message Component. This container provides the agent with the ability to create a service request, update it manually and add notes for the same.

Automatically Updating Service Requests

When a service request is created from a message component the service request number is included in the tag that is appended to the corresponding outbound email. When the customer replies back, the service request number is then extracted from the tag and can be used to update the service request automatically.

Lead Enabling Email Center

Lead creation provides a Message Component User the ability to associate a message with a Lead. However, to enable the Create Lead functionality, you must perform the following setup steps.

Steps:

1. Apply the appropriate Oracle Marketing and Oracle Sales patches.

The Create Lead functionality in Email Center will not work if the proper Marketing and Sales prerequisite patches have not been applied. If you do not want to implement Leads, do not enable this via Email Center.

Note: To enable Lead creation in Email Center, you will need to implement Leads 11.5.8, which is available through Oracle Marketing. If you have upgraded to or started with Oracle Applications 11.5.8, you are already at the appropriate patch level. If not, you must apply the following patches if you want to utilize the Create Lead functionality:

- 2459266: 11.5.8 Marketing Family pack (11i.MKT_PFA)
- 2026647: 11.5.8 Sales Family pack (11i.SLS_PFF)

2. Once you have installed the necessary patches, update the Profile value **IEM: Integration: Leads creation enabled** to "Yes".

The next time you login to Email Center, you should see the Leads container on the Reply and Compose pages.

Email Center Enabling Business Applications

The Oracle TeleSales application is integrated with Email Center to provide its agents with the Email Center Message Component for viewing archived emails and composing new emails. The advantage of using the Email Center Message Component is that the business application can pass data pertaining to the email header fields, customer, or contact against whom the interaction should be recorded; as well as locate the appropriate document to be used as the template for composing the email and for all merge fields used within the document. Using the data values passed, the compose email page is automatically populated so that the sales agent only needs to view the formatted email, add a comment if desired, and click "Send." The Message Component will then record the interaction and archive a copy of the outbound email as well.

Refer to the corresponding E-Business Suite application's Implementation Guide for details pertaining to their system profile settings and other configuration requirements.

Environment Setup:

Since the Email Center Message Component functionality relies on the Email Center infrastructure, your environment must be set up to support Oracle Email Center. This setup includes installing and configuring Oracle Email Server, setting up Email Center and creating email accounts. Refer to the latest *Oracle Email Center Implementation Guide* for details on how to accomplish this. If Email Center is not yet installed on your environment, then please follow the Installation and Configuration steps listed in Chapter 5 of this guide prior to performing the User Setup steps in the following section.

User Setup:

For a business application user to be able to use Oracle Email Center Message Component, the user must be assigned the specific responsibility and be assigned to at least one email account. Perform the following steps to enable business application users to use the Email Center Message Component:

Steps

1. Create a different email account if desired. Refer to Section 5.8 for creating an email account.
2. Assign the "Email Center Message Component" responsibility to the predefined business application user. Refer to Section 5.9.2 for assigning responsibilities to users.
3. Assign the business application user with the corresponding email account. Refer to Section 5.9.5 for assigning email accounts to agents.

Integration Troubleshooting:

You can perform the following tasks to troubleshoot your integration:

- Unable to Launch Message Component from Oracle Business Suite Application, page 7-3
- Error When Opening a Message in the Message Component., page 7-4

Unable to Launch Message Component from Oracle Business Suite Application

Indication: The agent is unable to launch the Email Center Message Component from the business application.

Solution: Check the following:

This step should have already been performed in the business application calling the Message Component. Perform the following steps as a validation check to ensure that the single sign-on function for launching the Message Component (IEM_MC_LAUNCHER) is included in the menu structure.

The steps listed below apply to all Forms based applications only. The prompt for this function in the menu structure is kept blank to disable the user from selecting it directly.

Login

Forms Login URL

Responsibility

System Administration

Prerequisites

None

Steps

1. Under the Functions tab, double-click **Application**.
2. Double-click **Menu**.

3. Under the View option in the menu bar, select **Query by Example** and click **Enter**.
The window is now in the query mode.
4. Enter the name of the menu from which the Message Component is launched.
5. Under the View option in menu bar, select **Query by Example** and click **Run**.
The details pertaining to that menu are now displayed.
6. Verify that IEM_MC_LAUNCHER exists in the list of functions with a blank Prompt field.

Error Occurs When Opening a Message in the Message Component

Indication: Upon invoking the Message Component from Forms, a browser window opens with an error rather than the Message Component.

Solution: Make sure your user has the Email Center Message Component Responsibility.

Diagnostics and Troubleshooting

This section contains material useful in diagnosing and troubleshooting the implementation of Oracle Email Center.

This chapter covers the following topics:

- Diagnostics
- Troubleshooting
- Installing Oracle Applications and Email Server Using the Same Database Instance
- Frequently Asked Questions

Diagnostics

A new selection on the Diagnostics page of the HTML Administration Console has been added to assist in debugging configuration problems. To access this page:

Prerequisite

none

Login

HTML Login URL

Responsibility

CRM HTML Administration

Steps

1. Click on the Diagnostics tab.
The Diagnostics Summary page appears.
2. From the Application list, select **Oracle Email Center**, then click the Basic or Advanced subtab.
3. Or, from the Test Summary table, click the hyperlinked number in the Registered Tests column corresponding to Oracle Email Center.
4. From the side panel, select the category of test you want to run.

Note: The following categories of tests are available on the Basic page:

- **RunAll** - Runs diagnostic checks on all the categories.

- **Email Account** - Email Account creation, authentication and rule-related checks can be performed using the tests provided in this category.
- **Oracle Email Server** - Connection tests to IMAP, sendmail and database listener can be performed using the tests provided in this category.
- **Database Server** - Database server related checks and validation can be performed using the tests in this category.
- **Database Links** - Database links related checks and validations can be performed using the tests provided in this category.
- **Configuration Setup** - This test checks if the minimum configuration setup has been completed.

Note: The following categories of tests are available on the Advanced page:

- **Email Account** - Email Account creation, authentication and rule-related checks can be performed using the tests provided in this category.
 - **Oracle Email Server** - Connection tests to IMAP, sendmail and database listener can be performed using the tests provided in this category.
 - **Database Links** - Database links related checks and validations can be performed using the tests provided in this category.
 - **Configuration Setup** - This test checks if the minimum configuration setup has been completed.
 - **Knowledge Base Document** - This test displays all documents in the MES knowledge Base that qualify as suggested response documents for the response keywords present in an Intent.
- The Tests page for the selection you chose appears, displaying a table with all the tests you can run.
 - From the table, click the hyperlinked test name to run the test.

Troubleshooting

Please refer to the latest IEM release Readme and relevant HTML files:

- Patch Description
- Frequency Asked Questions (FAQs)
- Implementation Overview
- Detailed Implementation Steps

Please refer to MetaLink - <http://metalink.oracle.com> for all the latest product documentation and documentation updates for Oracle's products.

1. **Error messages received when creating the Default Configuration.**

Indication: The Email Center administration user attempts to create the Email Center Default Configuration and receives error messages.

Solution: Most of the errors you see with the Email Center Default Configuration are due to incorrect data input. Ensure that the correct values are input in the following fields of the Create Configuration page. Listed below are the fields in which incorrect input values most commonly cause errors:

- Global Name of OES database: You can get the correct value for this field from the global_name table in the OES database. (sqlplus user/pswd : 'select * from global_name;')
- Domain Name for creation of accounts: Ensure that you provide a fully qualified domain name: For example, Email Center.COM or EMAILCENTER.COM (notice the .COM extension).
- OES node: Ensure that you provide the correct name of the OES node. You can get the correct value for this field from the ds_node table in OES database. (sqlplus oo/pswd: 'select name from ds_node;')

In addition to providing correct values for the fields listed above, ensure that you provide the correct Listener Port Number, Passwords, Machine name & IP address information.

1. **Error message received when associating a route with an email account.**

Indication: The Email Center administrator attempts to associate a route with an email account and receives an error message indicating that no resource groups are defined.

Solution: Ensure that at least one resource group has been defined which includes an agent with the Email Center Agent resource role.

1. **Email messages are not reaching the Inbox folder of my email account.**

Indication: Email messages have been sent to an OES email account. A user accesses the OES account inbox and does not see the email messages. This problem might be encountered while testing the OES installation during the Installation Checkpoint process.

Solution:

1. Check if the email has bounced because of a bad email address. Re-send the email to the correct email address.
2. Check if your email has reached the host machine where your OES is running. Check your system logs.
3. Check if the email has reached Oracle Email Server inbound SMTP gateway. Check your Oracle Email Server logs.
4. Check if your Postman process is running and delivering messages as they come. Check your Oracle Email Server logs.
5. **I can send emails to test users on my OES; but, when I send emails to an Email Center email account, I do not see it in the inbox.**

Indication: Email messages have been sent to an OES email account. A user accesses the OES account inbox and does not see email messages. This problem might be encountered during normal Email Center operations.

Solution: This generally means that the OES is not functioning properly. Check if the email messages are properly getting delivered by the Postman Process by looking at the

log files. Check if the email messages are in the Retry folder. Email messages might have failed while processing and have been moved to the Retry folder.

1. **Email messages are in the Admin folder.**

Indication: The Email Center administrator monitors the Admin folder and notices that messages are showing up in the Admin folder.

Solution: Email messages are moved into the Admin folder when email processing attempts to process an email in the Retry folder and fails. Ensure that database links are functioning properly, passwords have not changed, and so on. Move the messages from the Admin folder to the Retry folder. Run the 'Process standalone Email Center retry folder' concurrent program to re-process the emails in the Retry Folder.

1. **Email messages are not being moved into the appropriate classification folders.**

Indication: The Email Center administrator monitors the Email Center processing and notices that email metadata tokens are remaining in the Pre Meta-Data Table (Pre MDTS).

Solution: Email Center has two MetaData tables in its schema. They are IEM_PRE_MDTS (Pre MDTS) and IEM_POST_MDTS (Post MDTS). The Pre MDTS stores information about those emails that are still in processing phase. The Post MDTS stores fully processed email information. If your email metadata tokens are remaining in the Pre MDTS, the Concurrent program might not be running.

To see any existing Email Center concurrent processes, complete the following steps:

1. From the Forms application login page, login using the default system administrator user name and password.
2. From the list of application responsibilities, select Email Center Concurrent Program Administrator.

The Navigator-Email Center Concurrent Program Administrator page appears, displaying a list of functions.

3. From the list of functions, double-click **Run**.
 4. Double-click **Requests**.
 5. Click **Find** to see existing processes.
- **An Email Center Agent User does not see email accounts in the Email Center Home Page.**
 -

Indication: An Email Center agent user logs in to Email Center, and does not see email accounts listed in the Inbound Messages list.

Solution: Check the following:

- Is agent user assigned to the email account?
- Is agent user properly assigned to a Resource Group?
- Are there available email messages in the email account queue?
- **Intent email messages are not creating intents and keywords.**

Indication: The Email Center administrator logs onto the Self Service Administrator (SSA) Console and navigates to the Intents page. No intents are listed for the email account.

Solution: Check the following:

- Is the "Intent" account available/defined on the SSA Accounts page?
- Is Oracle Text properly configured?
- Does the sample email and response subject contain an <account@domain> value that is available/ defined in SSA Accounts page?
- **Documents are not being picked up as suggested responses.**

Indication: An Email Center agent user does not see suggested responses in the Suggested Response bin when replying to an email message.

Solution: Check the following:

- Ensure that intent processing is enabled for the email account.
- Ensure that after uploading documents, the "Rebuild Help Search Index" concurrent program is run.
- **Email Center Template Shows A Broken Image Instead Of Company Logo.**

Indication: Can't view company logo after selecting a template in the Knowledge Base.

Cause: Incorrect tag value for accessing the image in the HTML file

Solution: Before creating a template, create an HTML file as follows:

- <HTML>
@ <img src=http://<server>:<port>/<web_images_directory>/logo.gif>

<title>
CRM Global Information
</title>
Dear Customer,

Regards,

Oracle CRM Support Services
</HTML>

Upload this file to the Knowledge Base during the template creation phase.

Installing Oracle Applications and Email Server Using the Same Database Instance

If you choose to install and set up Oracle Applications and Oracle Email Server in such a manner that they both share the same database instance, then you must check and verify the following:

- The OO user must have execute permissions on IEM_IMCALLIEM_PVT.
- The APPS user must have execute permissions on API_ADM.

- The APPS user must have execute permissions on IM_API.
- The APPS user must have execute permissions on IM_IMT_API.
- The APPS user must have execute permissions on IM_IMT_EXTN.
- The APPS user must have execute permissions on DAPLS.

Warning: If execute permissions have not been set for any of the above, contact Oracle Support.

Frequently Asked Questions

Where can I get more information on migrating from Email Center 11.5.5 to 11.5.6?

Please refer to MetaLink - <http://metalink.oracle.com> for the Readme file of Oracle Applications of CRM 11.5.6 Family Pack.

What default folders and accounts are created on OES by Email Center?

The following email accounts must be created for supporting out-of-the-box functionality that is available in Email Center

1. **Intent:** This account should be used to create the question/response keywords in the system for intent analysis. Refer to section 2.5 and 4.3 for more information on creating intents
2. **Acknowledgements:** This account will be used to send out auto-acknowledgements from the system. Inbound emails arriving to this email account will not be processed by Email Center.
3. **Test:** This is a sample email account created for accepting inbound emails for processing.

While 'Acknowledgements' and 'Intent' email accounts are referred to as system email accounts, an email account like 'test' is referred to as a master email account.

Every master email account will have additional system-folders created which will be used at various times during the email processing. 'Retry', 'Admin', 'Resolved', 'Deleted', 'Sent', 'Unclassified' are the system folders that get created under the master account when it is created.

Additionally, every classification that is assigned to a master account will have its own folder. As well, for every agent that is associated with a master email account, a corresponding email account is created.

What email accounts are created when Email Center is configured using the Default Configuration screens?

System email accounts, i.e. Acknowledgements & Intent, and a sample master email account, test, are created when default configuration is used.

Where did the Email Center Admin and Operations Manager Consoles go?

The Email Center Admin and Operations Manager consoles have been replaced with the Self Service Administration console. Auto configuration of Email Center is now performed from a single input page accessible from the Setup Sub Tab menu. Email Center administration is performed from a common set of Self Service pages.

What is the Self Service Administration console?

Email Center Self Service Administration is a set of common pages for the setup and administering of Email Center from a single login. Self Service Administration is user friendly and chronological formatted for simple navigation and step-by-step set up. Key features and benefits include the following:

- Overall Ease of Use.
- Default configuration (setup) enables you to create a server group, define the Oracle Email Server (OES) database, create three database links to the OES database, define the IMAP and SMTP servers, and create three email accounts (Acknowledgements, intent, and test).
- Integration with Marketing Encyclopedia System (MES) Administration.
- Integration with One-to-One Fulfillment Administration.
- Graphical User Interface for defining classification and routing rules.
- Updating the Default Configuration data or creating a custom configuration

A user accessing the Self Service Administration console must have the Email Center Self Service Setup responsibility, MES Administrator resource role, and the JTF_FM_ADMIN role assigned.

What is the recommended Implementation approach for Email Center?

The Email Center Implementation steps have been grouped into 4 modules: Installation, Configuration, Rules and Business Data. This checklist is designed to act as a guide when implementing Email Center. If all required steps are followed in the sequence outlined, you should have a working Email Center system. The Configuration, Rules and Business Data steps can then be revisited to incorporate any implementation specific requirements. The Email Center Implementation Checklist is available from the crmextra site (crmextra.us.oracle.com/products/11i/callcenter/EmailCenter/1158/Email_Center_1158_Impltn_checklist.doc).

Setting Up Site Profiles

Why do I need a Default Customer?

All interactions have to be associated with a valid customer. The interactions for incoming emails from parties not defined in the system, will be either associated with a Default Customer or the agent can search for a valid customer.

What happen to the default Workflow shipped with Email Center?

The out of the box processing of default workflow has been replaced by database resident programs which do the equivalent processing, i.e. analyze emails, extract the contents, classify and route the emails and get the suggested response documents. The 'Mail Pre-processing' workflow is still provided but is called only for custom email processing - Refer to Create Email Accounts "Enable Customized Processing Flow" field.

What will happen to the existing customization done to the workflow (11.5.5 and before)?

If you already customized the default workflow (i.e. added some extra nodes, plugged in new customized API etc.), then in the SSA console, Create Account page you need to enable the customized workflow option. Refer to Create Email Accounts Enable Customized Processing Flow field.

How are Classifications used?

The Email Center classification engine automatically classifies incoming emails based on user-defined rules; these are presented to agents as queues. When a classification is associated with an email account, a folder bearing the classification name will be created under that account on the Oracle Email Server. Classification rules are constructed using key value pairs extracted from incoming emails. If none of the rules are satisfied, the email is assigned the classification "Unclassified".

How is Routing performed?

The Email Center Routing engine automatically routes incoming emails to an agent group based on user-defined rules. These rules are constructed using key value pairs extracted from incoming emails. The routing rules are executed in the ascending order of priority starting with 1. If none of the rules are satisfied, the email is routed to all agents belonging to that account. Emails are routed to an agent group and not to the individual agent. An agent (resource) group is only valid if it contains at least one resource, which is assigned to the email account and has one of the Email Center Agent, Email Center Supervisor, or Email Center Manager roles assigned to it.

What happened to the term Email Classification?

Email Classification is now referred to as Intent. Intents enable agents to identify the broad area pertaining to the email and assist in the selection of appropriate responses.

How does the Email Center analyze Incoming Emails?

Oracle Email Center is provided with a string of keywords or themes (for English language only) extracted from the email by the Oracle Text module of the Oracle database. Using these keywords, Oracle Email Center deciphers the intent of the email message or the broad area pertaining to the email and assists the agent in selection of appropriate responses. To enable the Email Center Intent engine, the administrator is required to create "intents" and keywords pertaining to the business. The keywords extracted from every incoming email are matched with the keywords stored in the Email Center schema to identify the intent of the email and fetch corresponding responses. Every intent and suggested response document is assigned a score (percentage) based on the scores of the keywords identified in the incoming email.

Does the Email Center Intent Processing support Multi Languages?

Email Center uses the Oracle Text application as part of its Intent analysis process. Oracle Text extracts a set of keywords from an incoming message and provides them to the Email Center Intent engine to identify the email intent. Once the intent for the email is identified, Oracle Text searches through the knowledge base repositories to determine appropriate response documents.

Oracle Text, previously known as interMedia Text, is a component of the Oracle 8i Database. It provides a generic search, retrieval, and viewing capabilities for text. When used with Email Center, Oracle Text 8.1.7 performs text searches and keyword analysis in languages supported by CRM applications. The quality of this process for a specific language is a function of not only how well the system has been "trained" and "tuned" over time by the administrator, but also the database character set and tools (such as stoplists provided by Oracle Text) used to optimize the search and retrieval of keywords.

Has the Email Center Agent Console login changed?

Yes and no. While agents can view email queues via UWQ, the Email Center Agent Console is also accessible directly from the HTML application login and the email queues are now displayed on the Home Page.

The Home page contains three containers:

- The Message Summary container

The Message Summary container allows you to view information about the messages waiting in each queue or classification, as well as the messages in your Inbox. Only the email accounts assigned to the agent will be displayed.

For each queue or classification, the Message Summary container shows you the number of messages currently in the queue or classification, the amount of time the oldest message has been in the queue or classification, and permits you to retrieve the next message from any of the queues or classifications that have email messages waiting in them. The Get Next Message icon is only activated when there is an inbound message waiting in the corresponding queue. When no messages are present in a particular queue, the icon is greyed out. Next message refers to the oldest message in the queue selected by the agent. Email Center follows the First-In-First-Out protocol, thus the oldest email is delivered to the agent. However, an incoming email can be categorized into multiple queues (classifications) based on prioritization.

For your Inbox, the Message Summary container shows you the current message count for each account or classification, the amount of time the oldest message has been in your Inbox for each account or classification, and provides an icon allowing you to compose a new email message for any of the accounts listed. If you have an unread email in your inbox, the number in the count column will be bolded. These emails are either assigned to you by your supervisor, transferred to you by another agent or got automatically routed to you.

- The Work Activity container

The Work Activity container lists the current count of the transactions you have performed for each type of message activity recorded by Email Center. The Work Activity container can be set for the following periods by setting the corresponding Profile option:

- Today
- This Week
- Since Last Login

The recorded message activities are:

- Fetched - Messages which you have fetched from the Queued Messages container.
- Responded - Messages you have fetched or been transferred and to which you have responded.
- Deleted - Messages which you have deleted.
- Transferred - Messages which you have transferred to another agent.
- Composed - Messages you have composed.
- Rerouted - Messages that you have received, then placed back into the same queue or a different queue forwarded to another agent.
- Opened - Messages that were assigned or transferred to an agent and have been read by the agent.

The Work Activity container also contains a Pending column. This column provides a count of the messages that you have finished and are currently queued for processing by the Outbox Processor.

Note: As these messages are processed by the Outbox Processor, the item count should return to zero. If the count remains the same for an extended period of time, this may indicate an error.

- The Break container

The Break container provides you with a means of indicating when you are going on a break and for what reason.

Where did Preview go?

The Preview page is gone but you can still view the inbound email by scrolling down the editor box text or by clicking on View Original Message button in the Reply page. The content of the incoming email is displayed on the Original Message page.

How does an Agent wrap up an Interaction without Customer Care?

An interaction record is created when you fetch an email from one of the queues or open an email transferred, routed, or assigned to you by another agent. The interaction record is closed when the outbox processor finishes processing the Send, Transfer, Delete, or Reroute operation. The information pertaining to that interaction is then recorded. When the system profile - **IEM: Message Component: Enable reason entry from the Reply/Compose** is set to **Yes**, you can enter a reason for each email processing action (send, transfer, reroute, delete, etc.). Otherwise, the default reason is assigned to each action when the outbox processor complete the appropriate process.

When an agent clicks **Send**, **Transfer**, or **Delete** the outbound message is queued and processed asynchronously. The Outbox Processor will record the interaction in Oracle Customer Interaction History and archive a copy of the outbound email prior to sending the email.

Can I still Search Emails?

Yes, the Search tab provides the functionality that enables you to search for archived emails. You can search for emails in system folders: Resolved, Sent, Deleted, or in your Inbox. The search is account based; hence, you select a particular account and a specific folder within that account for the search operation.

Oracle Email Center Implementation Worksheets

This chapter covers the following topics:

- Implementation Planning Questionnaire
- Implementation Worksheet

Implementation Planning Questionnaire

The following questions provide a high level overview of the information necessary to successfully implement Oracle Email Center. This is information that should be decided upon prior to beginning the implementation process.

Use the following questionnaire to gather information crucial to the implementation process:

Configuration Questions:

1. What email addresses does the business want to set up to receive email?
You will need to define the corresponding email accounts in Email Center to which inbound email will be directed. Examples could be: support_ca@company.com, info@company.com, promotions@company.com, sales@company.com, etc.
2. For each email account to be defined, which agents will be processing interactions?
3. What are the expected languages of incoming emails?
4. If intent processing will be required on these emails, how many different email accounts will be required?
5. What are the default outbound email header values for each account?

From address, reply-to address, etc.

Note: An agent may be assigned to multiple accounts, i.e., if an agent needs to work on email interactions sent to the support account, as well as those sent to the info account.

Rules Questions:

1. What criteria will be used to classify incoming emails to be presented to agents?

Classification queues are used to group incoming messages based upon the properties and content. For example, queues can be created (on a per account basis) to group emails based on a customer's service level or agent's area of specialization.

2. How will the classification queues be mapped to email accounts?
3. How will agents be grouped for each account?

Is it sufficient to define only one group for all the agents assigned to a particular account, or does it make sense to divide the agents into groups? It would make sense to define multiple agent groups for a particular account if there will be different agents who focus on working on certain types of issues or intents for the account, so that routing rules can be set up appropriately.

4. What routing rules need to be defined?
5. Which routes are required for each email account? What should be the destination groups for each route? What are the default destination groups?

Business Data Questions:

1. For each account, what set of intents need to be defined?

These intents are essentially for the buckets that describe the purpose of incoming emails for a particular account. Intents can be used to select the appropriate responses from the knowledge base and also used to determine the classification or routing destination of the incoming email. The subject matter for each intent should be mutually exclusive and collectively exhaustive for emails expected to be received in that account.

2. What are good sample emails for each intent?

- Does the customer already have sample data?
- Do you need to create test cases for intent analysis?
- Do the sample emails completely represent the different subject matter anticipated in emails belonging to the intent?

Note: The quality of the sample emails messages directly impacts the effectiveness of the intent functionality. Sample emails and sample responses should only contain text that is directly relevant to the subject matter for that intent (the text can be regular sentences as opposed to a list of keywords, but should not contain text such as 'Thank you in advance for your prompt attention to this matter,' or other extraneous text).

3. What are good sample response messages for each intent?

- Does the customer already have sample data?
- Do you need to create sample responses for intents?
- Do the samples completely represent the different types of responses for the intent?

Ideally, there should be at least one sample response for each sample email. As is the case with sample emails, the quality of the sample responses directly impacts the effectiveness of the response selection functionality and should only contain text that is directly relevant to the response subject matter.

4. What documents need to be uploaded into the knowledge bases?

Miscellaneous Question:

What custom workflows need to be developed?

Implementation Worksheet

Use the following worksheet to gather all the necessary information for completing the detailed tasks in the Create Default Configuration, Create a Custom Configurations, and Create Email Accounts sections.

Email Center Default Configuration Worksheet

Email Center Server Group Name: _____

Oracle Email Server

IP Address: _____

Host Name: _____

Database Listener Port Number: _____

Database SID: _____

Database Global Name: _____

OO User Password: _____

Email Account

Fully Qualified Domain Name: _____

Oracle Email Server Node Name: _____

Oracle Email Server OES Admin Password: _____

Language: _____

Application Database

Host Name: _____

Database Listener Port Number: _____

Database SID: _____

@ Apps User Password: _____

Email Center Custom Configuration Worksheet

Email Center Server Group

Group Name: _____

Group Description: _____

Database Server

Database Name: _____

Host Name: _____

Port: _____

Protocol (default is TCP): _____

Database SID: _____

Database Global Name: _____

Database Description: _____

Node Name: _____

Admin User: _____

Admin Password: _____

RT Availability: _____

Group Server: _____

Database Links

Database Name: _____

OO Password (Link to Email Server Database for OO user): _____

@ ORAOFFICE password (for ORAOFFICE User): _____

@ Apps Password (Link to Application for APPS User): _____

Application Database

Host Name: _____

Port: _____

Database SID: _____

Email Servers

Email Server Name: _____

DNS Name: _____

IP Address: _____

Port (For example: 143 for IMAP, 25 for SMTP): _____

RT Availability: _____

Group Server: _____

Server Type (IMAP and SMTP): _____

Email Accounts Worksheet

Email Address

Name: _____

Email Account: _____

Domain: _____

Profile: _____

Email Database Server: _____

Language: _____

Reply To: _____

Sender Name: _____

Enable Customized Processing Flow (Yes or No): _____

Password: _____

