

# Oracle® One-to-One Fulfillment

User's Guide

Release 11*i*

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**ORACLE®**

Oracle One-to-One Fulfillment User's Guide, Release 11i

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## Glossary

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# Send Us Your Comments

## **Oracle One-to-One Fulfillment User's Guide, Release 11i**

**Part No. B13659-01**

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
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If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

## Intended Audience

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

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

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

If you have never used Oracle One-to-One Fulfillment, Oracle suggests you attend one or more of the Oracle One-to-One Fulfillment training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

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

## How To Use This Guide

This document contains the information you need to understand and use Oracle One-to-One Fulfillment.

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

Chapter 2 provides a detailed description of Oracle One-to-One Fulfillment.

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

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

Chapter 5 describes task-based procedures for administering Oracle One-to-One Fulfillment.

Appendix A describes the Fulfillment Server parameters that can be set in the Fulfillment Server startup script.

Appendix B describes the commands used to operate a Fulfillment Server once it is running.

## Documentation Accessibility

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

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## Other Information Sources

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

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

### Online Documentation

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

### Related Documentation

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

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

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

### Documents Related to All Products

#### Oracle Applications User's Guide

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

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

## **Documents Related to This Product**

### **Implementing Oracle HRMS**

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

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

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

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

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

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

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

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

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

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

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

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

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

## **Oracle Content Manager Implementation Guide**

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

## **Oracle Content Manager User Guide**

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

## **Oracle Marketing Implementation Guide**

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

## **Oracle Marketing User Guide**

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

## **Installation and System Administration**

### **Oracle Applications Concepts**

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

## **Installing Oracle Applications**

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

## **Upgrading Oracle Applications**

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

## **Maintaining Oracle Applications**

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

## **Oracle Applications System Administrator's Guide**

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

## **Oracle Alert User's Guide**

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

## **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle9*i* Forms Developer forms so that they integrate with Oracle Applications.

## **Oracle Applications User Interface Standards for Forms-Based Products**

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

## **Other Implementation Documentation**

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

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

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

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

### **Oracle Workflow Guide**

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

### **Oracle Applications Flexfields Guide**

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

### **Oracle eTechnical Reference Manuals**

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

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

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

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

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

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

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

## **Training and Support**

### **Training**

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

### **Support**

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

### **OracleMetaLink**

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

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

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

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

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

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

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

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

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

## About Oracle

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

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

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

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

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# Introduction

Topics include:

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## 1.1 Oracle Interaction Center Overview

Every customer interaction — a telephone call, an e-mail message, or a Web chat conversation — presents an opportunity to win new business or improve customer satisfaction. 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:

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

### 1.1.1 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.

**See Also**

- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## 1.1.2 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.

**See Also**

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

### 1.1.3 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.

**See Also**

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## 1.1.4 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.

### See Also

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## 1.1.5 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.

### **See Also**

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## **1.1.6 Oracle Interaction Center Intelligence**

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

The data is presented to the user in a easy-to-use portal format. This format gives the user a unified, role-based, and easily 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.

**See Also**

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## 1.1.7 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

### See Also

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.8, "Oracle Scripting"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## 1.1.8 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.

**See Also**

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)
- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.9, "Oracle Universal Work Queue"](#)

## 1.1.9 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.

**See Also**

- [Section 1.1.1, "Oracle Advanced Inbound Telephony"](#)
- [Section 1.1.2, "Oracle Advanced Outbound Telephony"](#)

- [Section 1.1.3, "Oracle Customer Interaction History"](#)
- [Section 1.1.4, "Oracle Email Center"](#)
- [Section 1.1.5, "Oracle Interaction Blending"](#)
- [Section 1.1.6, "Oracle Interaction Center Intelligence"](#)
- [Section 1.1.7, "Oracle One-to-One Fulfillment"](#)
- [Section 1.1.8, "Oracle Scripting"](#)

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## Detailed Product Description

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

Topics include:

- [Section 2.1, "Oracle One-to-One Fulfillment Overview"](#)
- [Section 2.2, "New in this Release"](#)
- [Section 2.3, "Modified in this Release"](#)
- [Section 2.4, "Obsolete in this Release"](#)
- [Section 2.5, "Concepts"](#)

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

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

### 2.1.1 Basic Terminology

The following terms explain some basic concepts of Oracle One-to-One Fulfillment.

- **Cover letter or master document:** A document, sent by Oracle One-to-One Fulfillment, which typically includes merge fields that are populated by an associated SQL query.
- **Template:** A high-level definition of one or more Oracle One-to-One Fulfillment master documents, associated queries, and any related collateral.
- **Merge field:** Data elements in an Oracle One-to-One Fulfillment cover letter or master document that are surrounded by merge field delimiters. In print, merge field delimiters are represented by the double open and close bracket characters < and > (guillemet). These delimiters are represented in HTML by the ASCII codes &lquo; (for open or left delimiter) and &rquo; (for right or close delimiter). When a fulfillment request runs, any associated query retrieves the merge data from the table columns or views that are specified in the query. For each merge field that is used in a cover letter or master document, there must be one corresponding column name or alias in the select statement of the query to retrieve the appropriate data.
- **For Oracle Survey:** Invitation or reminder master documents contain at least one merge field to retrieve the survey URL that the recipient must access to participate in the survey. Other merge fields that are often part of invitation and reminder master documents are contact information (title, first name and last name) for each list member, and deployment end date.
- **Query:** A database query for information that is made in structured query language (SQL). Each Oracle One-to-One Fulfillment cover letter or master document may have an associated query. The information that the query gets is put into placeholders called merge fields in the resulting merged document. A query must have a column name or alias for each data element included as a merge field in the master document. The query may also contain valid column names or aliases for additional data elements, whether or not the data elements are used in each cover letter or master document. For example, you can

construct a single query that requests all information used to populate a survey invitation master document and a survey reminder master document, even if both documents have different merge fields. A single query can be associated with any number of cover letters or master documents. The data from a successfully run query merges with the document.

## 2.1.2 Templates, Master Documents and Collateral

A template is a grouping of Master Documents and Collateral. (This concept of templates exists only in Oracle One-to-One Fulfillment, not in Marketing Encyclopedia System.) Master Documents are dynamic or static documents. Dynamic content in master documents is defined by merge fields enclosed within special characters. Merge fields are tokens that are replaced by data when fulfillment requests are processed. E-mail and fax master documents can be HTML files or Zip files containing an HTML file plus an image file. Print master documents can be RTF or PDF files.

For RTF documents, merge fields can be entered using the Microsoft Form Field feature. In the form Field Help Text box, the merge field name should correspond to the name or alias used in the SQL query (in uppercase), and should be enclosed within the following text "<?" and "?>", for example <?CURRENT\_DATE?>.

For PDF documents, merge fields can be entered using the Form Tool feature. In the Field Properties box, the merge field Name should correspond to the name or alias used in the SQL query.

Oracle One-to-One Fulfillment Master Documents can optionally have a query associated with them. Some E-Business Suite applications, for example, TeleService or Sales Online, require an associated query.

Collateral (known as Deliverable in Oracle Marketing Online) is a static fulfillment document that does not contain merged data. Collateral are loaded by the Marketing Online Deliverables tab, and may be of any file format, for example, doc, xls, pdf, and so on.

## 2.1.3 Cover Letters

The cover letter (also known as content item) authoring screen allows the user to create and edit a cover letter based on the content type setup. A cover letter is the primary document that is sent to a customer by e-mail, fax, or print and mail. The user is able to specify a cover letter name, description, and the folder where the cover letter is stored. The following attributes are also available for cover letters:

- Body/Details - The user can enter an HTML body for the cover letter. If the content type has a query associated with it, the user is given a choice to embed the tags or merge fields into the HTML body. The user also has the option to specify a text part of the email. The text part will be read by non-html compliant email clients. Fax requests will only use the HTML part of the content.
- Attachments – The user can search for file attachments from the repository, or upload an attachment from the desktop. By default the attachment is saved to the same location as the cover letter. The user has the option to specify another folder location in which user has the permission to create content.
- Renditions – The One-to-One Fulfillment Oracle print solution supports printing of PDF or RTF documents. These PDF or RTF documents may contain merge fields. The user can select PDF or RTF file from the desktop and upload it as the cover letter content.

## 2.1.4 E-Business Suite Use of Templates, Master Documents and Collateral

Master Documents only:

- TeleService (seeded master document & query used)
- Lease Management

Collateral only:

- Scripting building block that calls One-to-One Fulfillment

Master Documents and Collateral

- TeleSales

Templates, Master Documents and Collateral:

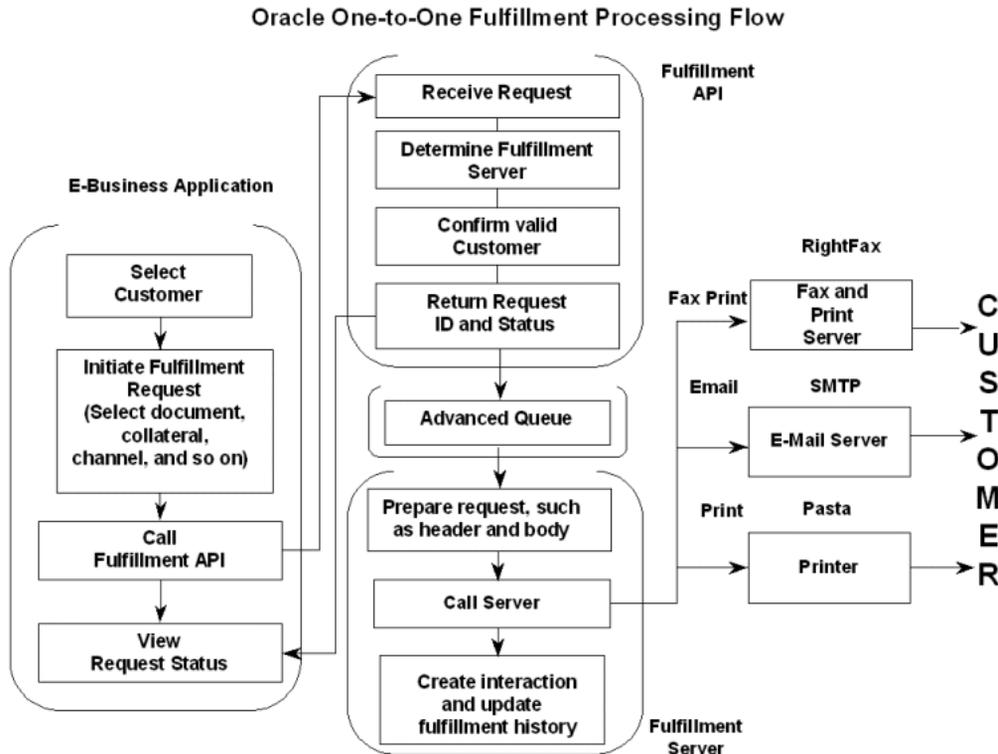
- Sales Online
- Survey
- Collections

Cover Letters

- Oracle Marketing Online
- Student Systems

## 2.1.5 Process Flow

The following diagram illustrates the process flow of fulfillment requests made with Oracle One-to-One Fulfillment.



- The calling applications provide screens or concurrent processes that enable the selection of one or more customers and documents or collateral.
- The Calling Application calls the One-to-One Fulfillment APIs, passing in required data about the particular fulfillment request.
- The Oracle One-to-One Fulfillment APIs process the request and return a request ID (or any errors) to the application. If successful, the API formats and places the request on an Advanced Queue to be picked up by the Fulfillment Server.

- The Fulfillment Server monitors the Request Queue for new requests, and pulls the request from the queue.
- The Fulfillment Server downloads document and collateral from MES or OCM, and sends the request to Java Mail APIs or Fax and Print enablers, or XML Publisher for merging and then prints from Oracle Pasta.
- Oracle One-to-One Fulfillment writes information on the request to Fulfillment History. If flagged to do so by the API, an entry is created in Interaction History is written against the party\_id passed in the request.

## 2.2 New in this Release

The following features and functions are new in this release.

### 2.2.1 High Quality Oracle Printing

Users can set up Rich Text Format or Adobe Acrobat PDF files, then upload and print them using high quality Oracle Pasta printing.

### 2.2.2 Malformed E-Mail Address Correction

The capability to view, correct and reprocess malformed e-mail address jobs has been added. The Fulfillment server uses the Java Mail API to partially validate e-mail addresses. An e-mail address containing a blank or null value is listed as malformed. The resulting e-mail messages cannot be sent to the customer.

### 2.2.3 Job Resubmitting

Documents previously sent to a specific customer can be resubmitted by the same or different output methods.

### 2.2.4 Bounced E-Mail History Viewing

Bounced e-mail are e-mail messages that have been returned to the sending server, for example, because of an incorrect address, the receiving server is down, or because the recipient's inbox is full. Oracle One-to-One Fulfillment has a feature that shows the total bounced e-mail messages received for each request.

### 2.2.5 Failed Job Viewing

View details of jobs within requests that failed and the reason for the failure.

## 2.2.6 Request Pausing and Resuming

When many very large volume e-mail campaigns are running, a backlog may develop because an e-mail server is unable to handle the load, or because an e-mail server goes down. In this situation, an administrator has the option of pausing the request that is being processed, and at a later time resume the request processing from the point where it was paused.

Marketing or Survey e-mail campaigns generally contain content that includes links to further information, promotions, surveys, registration forms, and so on, that are available on external Web servers. If one of these servers is unavailable, then the links embedded within an e-mail message become inaccessible. The administrator may want to pause running the e-mail campaign until the server is available again. When the problem is resolved, the administrator can continue processing the paused request or resubmit the whole request.

Oracle One-to-One Fulfillment offers the ability to pause a “Mass” fulfillment request that has been partially executed (status = in progress), and at a later time allow the administrator to continue the processing using the following commands:

- Resume, which starts the processing from where the request was paused
- Resubmit, which enables the whole request to be reprocessed from the beginning

Details of the jobs within a request that have already been sent or processed are available in the Request History pages.

## 2.2.7 Oracle Content Manager

Oracle One-to-One Fulfillment uses the Oracle Content Manager Content Type, Cover Letter and Query administration pages, which are accessible through the One-to-One Fulfillment Administration Console menus and offer the following features:

- Cover letter headers, footers and content blocks
- Cover letter versioning
- Utilize folders for storing cover letters
- Uploading content renditions for printing
- Cover letter approvals
- Updating and deleting cover letters

## 2.2.8 Repeating and Non-Repeating Table Rows With Merge Fields

To accommodate users who want to use HTML tables for document layout, and also to support repeatable fields, from Release 11.5.10 onward Oracle One-to-One Fulfillment can support both repeatable merge field table rows and non-repeatable merge field table rows.

## 2.3 Modified in this Release

The following features and functions have been modified in this release.

### 2.3.1 Responsibility

The Responsibility for the Oracle One-to-One Fulfillment Administration Console has been changed from "FMADMIN" to "One-to-One Fulfillment Administrator". Anyone using the FMADMIN Responsibility needs to change it manually to the new Responsibility. The FMADMIN Responsibility has a customized flag that prevents upgrades from updating it automatically.

### 2.3.2 Search Feature

A search feature is now available in the Status tab > Search sub tab that can search for Requests by the following criteria:

- History Request Identifier
- Customer Identifier
- Customer Name

The results display a summary of the Customer Identifier, Customer Name, History Request Identifier, Job, and Outcome Description. Users can click the History Request Identifier number to view the Request Details page, which displays a summary of the request (server name, submitted & completed times, agent who initiated the request, the outcome code, content sent, statistics, and jobs).

Users can click on the job identifier to view the Job Details page.

## 2.4 Obsolete in this Release

The following features and functions are obsolete in this release.

### 2.4.1 Fulfillment Server Parameter Content History

The Fulfillment Server parameter Content History has been deprecated. From Release 11.5.10 onwards, the history of each request is *always* recorded in the Content History table regardless of the setting of this flag. The Fulfillment Server now ignores the server flag -Dhistory.NoContents.

### 2.4.2 OCM Sub Tabs

The OCM Query sub tab and the OCM Template sub tab, which were under the Template tab, are now obsolete. Their functions have been replaced by the Content tab.

## 2.5 Concepts

Topics include:

- [Integration With Oracle Interaction Center Server Manager](#)
- [Advanced Queuing](#)
- [E-mail Bounceback](#)
- [Fulfillment Requests](#)
- [Fulfillment Server](#)
- [Remote Commands](#)
- [Fulfillment Channels](#)
- [Agent Groups](#)
- [Agent Resources](#)
- [E-Mail Tracking](#)
- [Templates](#)
- [MES Master Documents](#)
- [Queries](#)
- [Data Source](#)

- [Collateral](#)
- [Fulfillment Request History](#)
- [Fulfillment Request Status](#)
- [Physical Collateral](#)
- [Unsubscribe Option](#)
- [Resubmit](#)
- [Pause and Resume Request Processing](#)
- [Deletion of Sent Fulfillment Requests](#)
- [Master Document Editor](#)
- [High Quality Printing](#)

## 2.5.1 Integration With Oracle Interaction Center Server Manager

Oracle Interaction Center Server Manager is part of the Oracle Advanced Inbound HTML administration module. The Oracle Interaction Center Server Manager graphical interface is an efficient way to start, stop and manage all interaction center servers, including the Oracle One-to-One Fulfillment server. This section explains what Oracle Interaction Center Server Manager is and how to integrate it with Oracle One-to-One Fulfillment.

Oracle Interaction Center Server Manager is a Java server process that is installed on each target machine that runs interaction center servers. You can use Oracle Interaction Center Server Manager to do the following Oracle One-to-One Fulfillment processes:

- Set up the Oracle One-to-One Fulfillment Server
- Start and stop the Fulfillment Server
- See the status of the Fulfillment Server
- Inspect the Fulfillment Server Event and Error logs

## 2.5.2 Advanced Queuing

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

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

Business applications submit the fulfillment data in accordance with the Oracle One-to-One Fulfillment API procedures, which format the fulfillment request as an XML message. The API places fulfillment requests in a queue (enqueueing) and the Fulfillment Server retrieves fulfillment requests from a queue (dequeueing).

For more information about Advanced Queuing, see *Oracle 9i Application Developer's Guide - Advanced Queuing*.

### 2.5.3 E-mail Bounceback

Oracle One-to-One Fulfillment supports e-mail bounceback processing, the process of returning e-mail to the sending server because of an incorrect address (hard bounceback) or because the recipient's inbox is full (soft bounce back).

To enable bounceback processing, see

### 2.5.4 Fulfillment Requests

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

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

#### **Content**

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

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

## 2.5.5 Fulfillment Server

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

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

When a fulfillment request is processed, it creates a report in the Fulfillment history and an interaction record in Oracle Customer Interaction History. You can select which outcome reason and result you want to associate with a successful or failed fulfillment request.

## 2.5.6 Remote Commands

The remote command script lets users interact with the Fulfillment Server without the need to maintain the original command prompt that was used to start the server. To issue a command, type the name of the remote command script and the command.

The Fulfillment Server is configured in the startup script to monitor a port for remote commands. The port is specified in both the startup script for the server and the remote command script. The remote command script runs on the same

computer as the Fulfillment Server or on a computer that is on the same network as the Fulfillment Server.

When a command is sent through the remote command script, the computer that issued the command terminates activity after it receives a response to the command. To prevent unnecessary workload for the Fulfillment Server, the computer that issues the remote command retains a connection to the Fulfillment Server only for the duration of the remote command.

## 2.5.7 Fulfillment Channels

The Fulfillment Server compiles the content and sends the content to an output device. Output include e-mail, fax and print.

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

One or more e-mail servers can be associated with a Fulfillment Server.

## 2.5.8 Agent Groups

An agent is an employee who uses Oracle software. For agent using an E-Business Suite application to initiate a Fulfillment request, create groups of Fulfillment agents in the Oracle One-to-One Fulfillment Administration Console, and then assign them to a group.

## 2.5.9 Agent Resources

A resource is an employee whose record has been imported into the Oracle CRM Resource Manager, which provides a resource ID that makes that person a resource who is authorized to use CRM applications that require a resource ID for Customer Interaction History recording.

## 2.5.10 E-Mail Tracking

Oracle One-to-One Fulfillment tracks the outcomes of e-mail sent by a batch request, single request, or mass request. The Status page for the batch request shows the following statistics:

- Sent
  - Opened

- Unopened
- Not Sent
  - Malformed
  - Do not contact
  - Other failures
- Bounced
- Unsubscribed
- Resubmitted Malformed

The Fulfillment Server dispatches the e-mail requests to all the recipients of the e-mail. If Track Email is enabled, when a recipient opens the e-mail to read, at the end of the e-mail is an invisible reference to an image on a Web server. As the e-mail is downloaded, when a reference to the hidden image is encountered, the client tries to download the image from that particular Web server. However, the hidden image tag references a Java Server Page (JSP), which is responsible for updating the required tables with information that specifies which recipient had read the e-mail. The JSP that handles the hidden image needs to be accessible outside the firewall.

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

## 2.5.11 Templates

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

An template is a package of content that is compiled by the Fulfillment Server. The fulfillment request identifies the template being used to compile the content.

## 2.5.12 MES Master Documents

A master document is a message sent from Oracle One-to-One Fulfillment. It is an HTML file or Zip file that contains the main content in a fulfillment item.

Examples of master documents include:

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

A master document can be static or dynamic. A static master document does not have merge fields, so that each recipient gets the same content. A dynamic master document uses merge fields populated by an associated SQL query to combine information from the database (such as the name of the recipient or account information) into the content, so that each recipient gets personalized content. See [Queries](#) for information about queries.

The way in which the E-Business Suite application uses a master document determines whether the master document is used as a standalone or as a part of a template. See [Templates](#) for information about templates.

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

When editing HTML files in a word processor, remove from the HTML code any propriety information that was inserted by the word processor, otherwise the server will not process the document. For example, saving a Microsoft Word document as HTML inserts Microsoft proprietary information in the <HTML> header tag, that is, a line in the header stating,

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

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

## 2.5.13 Oracle Content Manager Profile Options

Oracle Content Manager has two profile options relevant to Oracle One-to-One Fulfillment, data security and the New Content Items folder.

### **Data Security**

The data security profile option enables and disables security in Oracle Content Manager. By default this option is disabled. To enable folder permissions, do the following:

- Set the security profile to Y.
- Set the necessary folder permissions for users of Oracle One-to-One Fulfillment.

### New Content Items Folder

Oracle Content Manager stores new content items in a folder that you need to specify. If these profile options are not set, Content Items cannot be submitted properly.

The following table describes the data security profile options.

**Table 2-1 Data Security Profiles**

Profile Name	Default Value	Comments
IBC: Use Access Control	N	Data security is disabled. Any user can create, update or delete a content item. All content items created are approved immediately.  If set to Y, data security is enabled. A check is made to see if the user has appropriate permissions to perform the actions.
IBC: Folder/Directory for new items	COMMON	Specifies the folder where new content items will be created.  <b>Note:</b> When data security is enabled, the user must have the required permission on this folder to create, update and delete items in this folder.  Permissions can be granted from the Oracle Content Manager Foldering tab.

### See Also

*Oracle Content Manager User Guide*

## 2.5.14 Queries

A query is a SQL statement that extracts selected data from a database. A query determines:

- Which records meet the defined criteria.
- Which fields of those records the query will return.

The returned data is merged with a master document to create a customized e-mail, fax, or printed mail for each recipient.

A single query can be associated with more than one master document if the merge field names used in the document match the database column names or aliases.

Use the following syntax when creating a SQL query.

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

When creating a query, note the following conditions:

- Aliases are optional.
- SQL statements typically end with a semicolon (;). However, in this case, the query engine appends the semicolon. Do NOT append a semicolon to the end of this query.
- Column name aliases follow the column names and appear before the comma or the next keyword. Use aliases as substitutes in master documents for the actual column names. Aliases are not required, but can be helpful.
- The table from which the columns are selected follows the FROM keyword.
- The bind variable specifies which row is pulled from the table to give the actual data for each merged document. A colon in front of a bind variable makes it a global variable. This enables the query to recognize it after the value is passed from the user interface. For example:

```
SELECT person_last_name last_name,  
       party_id customer_number,  
       creation_date,  
       phone_number  
FROM jtf_contact_points_v  
WHERE person_first_name = :fname;
```

Merge fields should match exactly with the Master Document.

## 2.5.15 Data Source

Creating a data source file is an optional method of saving queried data to be used in a master document. A data source file is a text file that contains tab-separated

merge fields that have been obtained by a query. Use the data source file to obtain the columns available from the query so that they can be used as merged fields. This can be helpful when creating master documents. The master document must be an HTML file.

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

The data source utility opens a window that shows the following column headers in a plain background window.

```
lname      CustNumb      creation_date      phone_number
```

## 2.5.16 Collateral

Use Collateral items, called deliverables in Oracle Marketing Online, are uploaded using the administrative console for Oracle Marketing Online. You cannot upload or view Oracle Marketing Online deliverables from the Oracle One-to-One Fulfillment administrative console.

Collateral items are sent as attachments to email output. Oracle Marketing to upload collateral items. Collateral may be included in fulfillment requests that are created using Oracle Scripting, Oracle Sales Online, and Oracle TeleSales.

## 2.5.17 Fulfillment Request History

The Status tab > History sub tab is a record of fulfillment requests that a Fulfillment Server is currently being processed or has been processed, successfully or unsuccessfully. You can view the details of a fulfillment request, re-submit a fulfillment request, and delete a history entry from the history list.

To view requests by outcome, select an outcome level from the View list. The listed outcomes are defined as follows:

- All: All Fulfillment requests are displayed in descending order of Request ID.
- Cancelled: Fulfillment Requests that have been canceled by the administrator or by the calling application.
- Failed: Fulfillment Requests that were not processed successfully. If the request contains more than one job, all jobs within the request failed.
- Partially Successful: Fulfillment Requests that contain one or more jobs that could not be processed successfully, and at least one job that was successfully processed. For example, if a customer is listed as "do not contact" for the

particular media channel, then a failure is logged for that job and the outcome of the request becomes "partially successful."

- **Stalled:** Fulfillment Requests that have stalled while being processed by the Fulfillment Server. A request can stall due to many reasons, but if it is stalled because of a database connectivity issue, the server will continue to periodically try to reconnect and, if successful, it will continue to process the request. Most stalled requests are caused by the fulfillment server stopping abnormally, in this case restart the server to continue processing the request.
- **Successful:** Fulfillment Requests that were processed successfully.

### 2.5.18 Fulfillment Request Status

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

Each status is defined as follows:

- **Submitted:** Fulfillment Requests that have been submitted to the Fulfillment Server for processing
- **Re-submitted:** Fulfillment Requests that have been re-submitted for processing
- **In Progress:** Fulfillment Requests that are currently being processed
- **Paused:** Fulfillment requests that have been partially processed and then paused
- **Resumed:** Fulfillment requests that were paused and subsequently resumed

### 2.5.19 Physical Collateral

APIs enable E-Business Suite applications to pass physical collateral requests. In turn, One-to-One Fulfillment integrates with Order Management to execute these requests.

### 2.5.20 Unsubscribe Option

One-to-One Fulfillment has an unsubscribe feature for e-mail fulfillment requests. The e-mail contains an embedded URL link to a Web page so that when users access the Web page, a validity check is performed and users have the option to unsubscribe.

The Unsubscribe option in the Fulfillment Server configuration causes the Fulfillment Server to insert a hypertext link into the content of e-mail that will allow e-mail recipients to modify their contact preferences.

For e-mail requests, the outgoing e-mail contains an embedded URL to a Web page. The URL leads to the Oracle Marketing Online Contact Preferences page, where the recipient can set contact channels. The format of the unsubscribe link is:

```
http://<host>:<port>/OA_HTML/<name of the  
jsp>?PAGE.OBJ.requestId=&PAGE.OBJ.objId=
```

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

The party\_id is the numerical identifier of the recipient of the e-mail. The party\_id is used when the amsContactPreferencesMain.jsp page is called to confirm that the party is valid, and that the appropriate Contact Preferences table within TCA can be modified when the customer unsubscribes. The party identifier is encrypted so that it is not visible to the e-mail recipient. Oracle Marketing Online uses the encryption key in the JTO: Security: Merge Field Encryption Key profile option to decrypt the party identifier and enable access to the party's contact preference settings.

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

To enable or disable the unsubscribe link, use the Unsubscribe box on the E-mail Server page for the Fulfillment Server. This option affects the e-mail fulfillment requests that are processed by all e-mail servers assigned to the Fulfillment Server. It cannot be set for an individual e-mail server.

## 2.5.21 Resubmit

The One-to-One Fulfillment Administration Console has a Resubmit option in the Status tab > History sub tab. This options enables a request to be resubmitted by using the original data.

The One-to-One Fulfillment Administration Console provides a Resubmit option for jobs in the Jobs Details page. This options enables a job (that was sent to a single customer) to be resubmitted using the original data. The user is able to select an alternative delivery channel and contact address for the recipient.

## 2.5.22 Pause and Resume Request Processing

One-to-One Fulfillment has a pause and continue function that administrators can use to pause an in-progress batch request, and later resume processing the request. This function is available in the Request Status page.

## 2.5.23 Deletion of Sent Fulfillment Requests

A Delete option is in the Status tab > History sub tab for deleting canceled, completed, and failed requests.

## 2.5.24 Master Document Editor

The One-to-One Fulfillment Master Document Editor simplifies the administrators' job of creating and publishing static and dynamic documents for communicating with customers.

The Master Document editor provides a fast and simple mechanism for creating master documents, creating and associating a query and uploading into the Management Encyclopedia System.

Text can be written in Rich Text Format, which supports multiple fonts, sizes and styles, and URL links and image insertion.

## 2.5.25 High Quality Printing

The high quality print Oracle solution enables the uploading of RTF or PDF Form documents, and offers E-Business Suite Applications the ability to initiate requests to print RTF or PDF Form documents or cover letters.

An Administrator creates an RTF document using Microsoft Word (or opens an existing document), uses the Form feature to insert the relevant personalized data (merge fields) in the appropriate positions in the letter or table, and then saves the document as an RTF file. When the document has been uploaded into the Content Repository, it is available for sending. Static PDF or RTF documents, such as attachments, can be printed in addition to the primary personalized document.

Oracle One-to-One Fulfillment also supports printing documents and collateral by way of Captaris RightFax.

### **2.5.25.1 Oracle Pasta**

Oracle Pasta is an Oracle printing solution that uses an executable called FNDPSTAX. The FNDPSTAX tool submits print requests to the operating system printing functions:

- lp on UNIX and Linux
- print on Windows

To use the High-Quality Printing feature, you must first be able to print from the Fulfillment Server host machine using either lp or print, depending on your operating system. It is the responsibility of the local system administrator to configure the operating system and network for printing.

### **2.5.25.2 XPDF pdftops**

XPDF is an open source viewer for PDF files. It includes a PDF-to-Post Script conversion tool called pdftops. Pasta uses PDF to PS to convert the resulting PDF files into PS before spooling them to the printer. Download XPDF at <http://www.foolabs.com/xpdf/> for a download.

### **2.5.25.3 XML Publisher**

XML Publisher is an Oracle toolset that provides utilities to transform RTF and PDF documents into a format called XSL-FO (or eXtensible Stylesheet Language-Formatting Objects). The XSL-FO format is used as a base format that can be transformed back into RTF or PDF (and in later XML Publisher versions) HTML. XSL-FO is not intended for end users like marketers, survey creators, or other Fulfillment users who are responsible for creating Fulfillment Content. It is mentioned here for information purposes only. XML Publisher 4.3 contains the necessary RTF conversion utilities.

### **2.5.25.4 RTF and PDF**

Due to the reliance on the XML Publisher utilities, only Fulfillment requests that contain strictly RTF or PDF documents can be printed through the High-Quality Print solution. Requests that contain any other file types can only be printed by the existing RightFax printing solution.

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## Administration Tasks

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

- [Managing Servers](#)
- [Defining Print Servers and Printers for the High-Quality Printing](#)
- [Managing Fulfillment Agent Groups](#)
- [Managing Oracle Marketing Encyclopedia System Templates](#)
- [Managing Oracle Marketing Encyclopedia System Master Documents](#)
- [Viewing Oracle Marketing Online Collateral](#)
- [Managing Oracle Marketing Encyclopedia System Queries](#)
- [Managing Content](#)
- [Managing Fulfillment Requests](#)
- [Managing Fulfillment Request History](#)
- [Using the Quick Find Feature](#)
- [Using Merge Fields](#)
- [Setting Up High Quality Printing](#)

### 3.1 Managing Servers

Use the following procedures to administer the Fulfillment, e-mail, print and fax servers.

- [Viewing Fulfillment Server Status](#)

- [Setting the Fulfillment Server Start Time and Shutdown Time](#)
- [Setting the Interaction History Outcomes and Results](#)
- [Enabling the Unsubscribe Option in E-Mail Requests](#)
- [Enabling Tracking for E-Mail Requests](#)

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**Note:** In all Fulfillment server configuration options, for the changes to take effect you must restart any running servers. The information is gathered only once at startup.

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### 3.1.1 Viewing Fulfillment Server Status

Use the following procedure to determine whether or not the Fulfillment Server is running.

#### **Login**

HTML Login URL

#### **Responsibility**

Call Center HTML Administration

#### **Prerequisites**

Define at least one Fulfillment Server

#### **Steps**

1. Select the ICSM tab > Server Groups sub tab.  
The Server Group List page appears.
2. Click the Server Group Name that contains the Fulfillment Server.  
The Server Group Details page appears.
3. In the Servers group, look in the Status column of the Fulfillment Server. If the flag is green, then the server is running. If the flag is red, then the server is down. Tool tips also display the server status.

## 3.1.2 Setting the Fulfillment Server Start Time and Shutdown Time

Use this procedure to set the start and shutdown times for the Fulfillment Server. The start and shutdown times indicate the times when the Fulfillment Server polls the fulfillment request queues in the database. It does not physically start or stop the server. You can set a start and shutdown time if you do not want the Fulfillment Server to process fulfillment requests twenty-four hours a day.

### Login

HTML Login URL

### Responsibility

One-to-One Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Server tab > Server sub tab.  
The Servers page appears.
2. Click a Fulfillment Server name link.  
The Server Details page appears.
3. From the Start Time lists, select the hour and minute for the time at which the Fulfillment Server starts polling the fulfillment request queues in the database. It does not physically start the server. If running, the server will continue to process retrieved fulfillment requests even when it is not polling the database.
4. From the Shutdown Time lists, select the hour and minute for the time at which the Fulfillment Server stops polling the fulfillment request queues in the database. It does not physically stop the server. If running, the server will continue to process retrieved fulfillment requests even when it is not polling the database.
5. Click **Continue**.
6. Restart any currently running Fulfillment servers for the changes to take effect.

### 3.1.3 Setting the Interaction History Outcomes and Results

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

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Server tab > Server sub tab.  
The Servers page appears.
2. Click a Fulfillment Server name link.  
The Server Details page appears.
3. From the Request Outcome list, select the outcome that you want to associate with a fulfillment request job that has been processed by the Fulfillment Server.
4. From the Request Success Result list, select the result that you want to associate with a fulfillment request job that has been successfully processed by the Fulfillment Server.
5. From the Request Failure Result list, select the result that you want to associate with a fulfillment request job that has not been successfully processed by the Fulfillment Server.
6. Click **Continue**.
7. Restart any currently running Fulfillment servers for the changes to take effect.

### 3.1.4 Enabling the Unsubscribe Option in E-Mail Requests

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

**Login**

HTML Login URL

**Responsibility**

One-to-One Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Server tab.  
The Servers page appears.
2. Click a Fulfillment Server Name.  
The Server Details page appears.
3. In the side panel, click **Email Servers**.  
The Email Servers page appears.
4. Select **Unsubscribe**.
5. In the Unsubscribe Text and URL field, enter the message that explains to customers how to unsubscribe. Enter the URL by which customers can unsubscribe.
6. Click **Update**.
7. Restart any currently running Fulfillment servers for the changes to take effect.

### 3.1.5 Enabling Tracking for E-Mail Requests

Use this procedure to enable the Fulfillment Server to track e-mail statistics for all e-mail requests.

**Login**

HTML Login URL

**Responsibility**

One-to-One Fulfillment Administrator

## Prerequisites

None

## Steps

1. Click the Server tab.  
The Servers page appears.
2. Click a Fulfillment Server name link.  
The Server Details page appears.
3. In the side panel, click **Email Servers**.  
The E-mail Servers page appears.
4. Select **Track Email**.
5. In the Tracking URL field, enter the HTML code that includes the URL that is called when recipients open e-mail.
6. Click **Update**.
7. Restart any currently running Fulfillment servers for the changes to take effect.

## 3.1.6 Setting Up Bounce Back

Bounce back management allows users to address outbound e-mail messages so that destination e-mail servers send "bounces" back to a specific account. The address to which the bounced messages are sent contain the request and job information, which allows Oracle One-to-One Fulfillment to identify which e-mail messages bounced.

E-mail administrators need to update the Sendmail configuration to direct bounced messages into a single bounce back account. The configuration steps that are required for Bounce Back Management can be performed on both new and existing Fulfillment Servers. Bounce back management does not affect the functionality that is provided with Tracking or with the Unsubscribe feature.

Bounced messages are recorded. To determine the reason why a message bounced, a user would have to perform an analysis outside of what Oracle One-to-One Fulfillment provides.

### 3.1.6.1 Configuring Bounce Back

Use the following procedure to configure e-mail bounce back.

**Login**

Not Applicable

**Responsibility**

Not Applicable

**Prerequisites**

None

**Steps**

1. The e-mail administrator must create a bounce back account, and then record the host name of the IMAP server, the user name for the bounce back account, and the password. For example, assume the name of the account is "bounces."

Modify sendmail to reroute messages addressed to the name of the bounce account plus any addition string to the bounce account. For example, if your bounce account is called bounces@domain.com, make sure that any e-mail messages addressed to bounces\_12345@domain.com get routed to the bounce account. An example sendmail rule to do this is shown below, but this task is left to the mail administrator.

```
Rbounces _$* < @ $* > bounces< @ $ 2 >
```

2. Restart Sendmail.
3. Test by sending a message to bounces\_123@<bouncedomain>.com and check that it arrives in the bounce account.

The message should arrive in the bounce account. The configuration and testing of the Sendmail setup is up to the local e-mail administrator.

When Sendmail is redirecting bounced e-mail messages to the bounce account, you can set up the Fulfillment Server.

**3.1.6.2 Configuring Bounce Back In Fulfillment Administration Console**

Use the following procedure to configure e-mail bounce back in the Administration console.

**Login**

Fulfillment Administrator Console

## Responsibility

Not Applicable

## Prerequisites

Set up Sendmail

## Steps

1. Select the Server tab > server name.

The Email Servers page appears.

2. In the Bounceback Management group, select the Enable Bounceback option.

This option instructs the Fulfillment Server to create the bounceback monitoring thread when it starts, and to append the bounceback information as the From address on outgoing e-mail messages.

3. Enter the host name or IP address of the IMAP host where the bounce account has been created.

4. Add the IMAP port. The default IMAP port is 143.

5. Enter the account name and the account password.

6. Select a run frequency. The run frequency indicates how often the bounceback monitoring thread will run. A typical Run Frequency is every two hours. Set this value lower if you need quicker results and are sending large volumes of e-mail. Set this value higher if you are not concerned with recording bounceback messages. The difference is that they will be recorded, but if you only have it run every twelve hours, updates to the counts are only done in that interval.

When running, the thread connects to the bounces account and scans the inbox for any new messages. For each new message, it updates the database. When you view the request history, you can see the number of bounced messages in a particular request.

7. Enter a Return Path. The return path should be the e-mail address for the bounce account, for example, bounces@yourcompany.com. Oracle One-to-One Fulfillment uses all information to the left of the @ sign as the prefix that you should use in your sendmail.cf file.

8. Restart the Fulfillment server for the changes to take effect.

## 3.2 Defining Print Servers and Printers for the High-Quality Printing

The Printer tab is only for users of Oracle E-Business Suite Applications to configure print servers and printers that are used with the High-Quality Printing.

### Tasks

You can perform the following tasks:

- [Configuring a Print Server for the High-Quality Printing](#)
- [Configuring Printers for the High-Quality Printing](#)

### 3.2.1 Configuring a Print Server for the High-Quality Printing

Use the following procedure to create a print server.

#### Login

HTML Login URL

#### Responsibility

One-to-One Fulfillment Administrator

#### Prerequisites

None

#### Steps

1. Select the Printer tab.  
The Print Servers page appears.
2. Click **Create**.  
The Create Print Server page appears.
3. In the Print Server Name field, type a descriptive name for the print server.
4. For printing RTF or PDF documents, in the Connection String field, type the URL or IP address of the print server.
5. From the Server Type list, select **Pasta**.
6. Click **Apply**.  
The Print Servers page appears.

### **See Also**

To associate a printer server with the Fulfillment Server, see the *Oracle One-to-One Fulfillment Implementation Guide*.

## **3.2.2 Configuring Printers for the High-Quality Printing**

Use the following procedure to associate printers with a printer server.

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Select the Printer tab.  
The Print Servers page appears.
2. Click the print server Name.  
The Update Print Server page appears.
3. Click **Create Printer**.  
The Create Printer page appears.
4. In the Printer Name field, type a descriptive name for this printer.
5. Optionally, in the Description field, type a description of this printer.
6. In the Network Name field, type the printer name that identifies this printer on your local area network.
7. Click **Apply**.  
The Update Print Server page appears.

### **See Also**

To associate a printer server with the Fulfillment Server, see the *Oracle One-to-One Fulfillment Implementation Guide*.

## 3.3 Managing Fulfillment Agent Groups

Use the Group sub tab to create a fulfillment agent group and assign the fulfillment agent group to a Fulfillment Server.

### Tasks

You can perform the following tasks:

- [Creating an Agent Group](#)
- [Adding an Agent to a Group](#)
- [Removing an Agent from a Group](#)
- [Assigning a Fulfillment Agent Group to a Fulfillment Server](#)

### 3.3.1 Creating an Agent Group

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

#### Login

HTML Login URL

#### Responsibility

One-to-One Fulfillment Administrator

#### Prerequisites

Create user accounts for agents.

#### Steps

1. Click the Group tab > Groups sub tab.  
The Groups page appears.
2. Click **Create**.  
The Create Group page appears.
3. In the Group Name field, enter a unique name for the group.  
You cannot change this field after the server is saved.
4. Optionally, in the Description field, enter a description of the group.  
This field is for informational purposes only.

5. From the Server Name list, select the name of the Fulfillment Server.

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

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---

6. Add agents to the group.
  - a. In the Agent area, in the Name column, type a user name or other search criteria, and then click **Go**.

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

The Select Agent page appears. The search results are listed.
  - b. To modify your search, type new search criteria in the Search field and then click **Search**.
  - c. Click a user name.

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

The Groups page appears.

### 3.3.2 Adding an Agent to a Group

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

#### Login

HTML Login URL

#### Responsibility

One-to-One Fulfillment Administrator

#### Prerequisites

None

#### Steps

1. Click the Group tab > Groups sub tab.

The Groups page appears.

2. Click a group name.

The Group Detail page appears.

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

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

To clear the search criteria, click the Restore button.

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

4. To modify the search, type new search criteria in the Search field and then click **Search**.
5. Click a user name.

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

6. Click **Update**.

### 3.3.3 Removing an Agent from a Group

Use this procedure to remove an agent from a Fulfillment agent group.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Group tab.
2. Click the Groups sub tab.  
The Groups page appears.
3. Click a group name.

The Group Detail page appears.

4. In the Agent area, select the Remove box for the agent that you want to remove from the agent group.
5. Click **Update**.

The agent is removed from the agent group and the Groups page appears.

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

Use this procedure to assign a fulfillment agent group to a Fulfillment Server.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

- Create user accounts for agents.
- Create a fulfillment agent group.
- Configure a fulfillment server.

#### **Steps**

1. Click the Group tab > Groups sub tab.  
The Groups page appears.
2. Click a group name.  
The Group Detail page appears.
3. From the Server Name list, select a Fulfillment Server.
4. Click **Update**.

## 3.4 Managing Oracle Marketing Encyclopedia System Templates

Use the Template sub tab to manage groupings of Oracle Marketing Encyclopedia System master documents and OMO collateral items.

## Tasks

You can perform the following tasks:

- [Creating a Template](#)
- [Assigning a Master Document to a Template](#)
- [Assigning Collateral to a Template](#)
- [Updating a Template](#)
- [Removing a Master Document from a Template](#)
- [Removing Collateral from a Template](#)

### 3.4.1 Creating a Template

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

#### Login

HTML Login URL

#### Responsibility

One-to-One Fulfillment Administrator

#### Prerequisites

Create master document and at least one master document collateral.

#### Steps

1. Click the Template tab > Template sub tab.  
The Templates page appears.
2. Click **Create**.  
The Create Template page appears.
3. Enter the details about the template.
  - a. In the Template Name field, type a unique name for the template.
  - b. From the Status list, choose the status of the template.  
You have the following options:

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

The View Template page appears.

### 3.4.2 Assigning a Master Document to a Template

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

#### Login

HTML Login URL

#### Responsibility

One-to-One Fulfillment Administrator

#### Prerequisites

- Create a template.
- Create a master document.

#### Steps

1. Click the Template tab > Template sub tab.

The Templates page appears.

2. Click a template name.
3. In the side panel, click Master Documents.

The View Template page appears.

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

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

To clear the search criteria, click **Restore**.

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

5. If you want to modify your search, type new search criteria in the Search field and then click **Search**.
6. Click **Select** next to a master document name.
7. Click **Update**.

The View Template page appears.

### 3.4.3 Assigning Collateral to a Template

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

#### Login

HTML Login URL

#### Responsibility

One-to-One Fulfillment Administrator

#### Prerequisites

- Create a template.
- Create collateral.

#### Responsibility

One-to-One Fulfillment Administrator

#### Steps

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

The View Template page appears.

### 3.4.4 Updating a Template

Use this procedure to update a template.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Template tab > Template sub tab.  
The Templates page appears.
2. Click a template name link.  
The View Template page appears.
3. From the Status list, select the status of the template.  
You have the following options:
  - Active: The template is available for fulfillment requests.
  - Inactive: The template is not available for fulfillment requests.
4. Optionally, in the Template Description field, type a description about the template.  
This field is for informational purposes only.
5. Click **Update**.

### 3.4.5 Removing a Master Document from a Template

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

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Template tab > Template sub tab.  
The Templates page appears.
2. Click a template name.
3. In the side panel, click **Master Documents**.  
The View Template page appears.
4. Select the Remove box for the master document that you want to remove from the template.
5. Click **Update**.  
The master document is disassociated from the template and the Master Document list in the View Template page is refreshed.

## **3.4.6 Removing Collateral from a Template**

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

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

## Prerequisites

None

## Steps

1. Click the Template tab > Template sub tab.  
The Templates page appears.
2. Click a template name.
3. In the side panel, click **Collateral**.  
The View Template page appears.
4. Select **Remove** next to the collateral name.
5. Click **Update**.  
The collateral is disassociated from the template. The Collateral list in the View Template page is refreshed.

## 3.5 Managing Oracle Marketing Encyclopedia System Master Documents

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

### Tasks

You can perform the following tasks:

- [Creating an Oracle Marketing Encyclopedia System Master Document Using the Text Editor](#)
- [Uploading an Oracle Marketing Encyclopedia System Master Document](#)
- [Updating an Oracle Marketing Encyclopedia System Master Document](#)
- [Viewing an Oracle Marketing Encyclopedia System Master Document](#)
- [Downloading an Oracle Marketing Encyclopedia System Master Document](#)
- [Assigning a Query to an Oracle Marketing Encyclopedia System Master Document](#)

- [Removing a Query From an Oracle Marketing Encyclopedia System Master Document](#)

### 3.5.1 Creating an Oracle Marketing Encyclopedia System Master Document Using the Text Editor

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

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Template tab > Master Document sub tab.  
The Master Document page appears.
2. Click **Create and Upload**.  
The Master Document Editor page appears.
3. In the Master Document Name field, type a unique name for the master document.  
  
When you save the document, the body of the fulfillment document will be saved with this name (for example, name .htm). In addition, the name will appear in list of documents in Oracle One-to-One Fulfillment and the business application. You cannot change this field after the document is saved.
4. If you want to compose the master document using plain text, click the **Change to Plain Text Mode** link.
5. If you want to compose the master document using formatted text, click the **Change to Rich Text Mode** link.  
  
A formatting tool bar appears.

6. If you want to insert a merge field derived from a query, then do the following:
  - a. In the SQL Merge Field field, click **Create Query**.

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

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

This field is for informational purposes only.
  - d. In the SQL Query field, type the SQL statement.

---

---

**Note:** Do not insert a semicolon (;) at the end of the SQL statement.

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- e. Click **Validate SQL and Save**.

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

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

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

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

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

## 3.5.2 Uploading an Oracle Marketing Encyclopedia System Master Document

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

### Login

HTML Login URL

### Responsibility

One-to-One Fulfillment Administrator

### Prerequisites

None

### Steps

1. Click the Template tab > Master Document sub tab.  
The Master Document page appears.
2. Click **Upload**.  
The Update Master Document page appears.
3. In the File Name field, click the **Browse** button to navigate to the directory that contains the document.  
  
Note that the name of the file is the name of the document that will appear in the Master Documents list. You will not be able to change this name later.
4. Select the master document.
5. Click **Upload**.  
The Upload Master Document page refreshes.
6. Optionally, in the Description field, type a description of the Master Document.
7. Optionally, from the Query list, select the query that you want to associate with the master document.
8. Click **Upload**.  
The Master Document page appears.

### 3.5.3 Updating an Oracle Marketing Encyclopedia System Master Document

To update a document that has been uploaded to Oracle Marketing Encyclopedia System, upload the document again. The document will have a unique numerical identifier even if it has the same name as a previously uploaded document. Therefore, the list of Oracle Marketing Encyclopedia System master documents may contain more than one document with the same name.

### 3.5.4 Viewing an Oracle Marketing Encyclopedia System Master Document

Use this procedure to view an Oracle Marketing Encyclopedia System master document.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Template tab > Master Document sub tab.  
The Master Document page appears.
2. Click a master document name link.
3. If the document is an HTML file, then the file appears in a new browser window.
4. If the document is a Zip file, then a File Download window appears.  
You can open or save the Zip file.

### 3.5.5 Downloading an Oracle Marketing Encyclopedia System Master Document

Use this procedure to download an Oracle Marketing Encyclopedia System master document to a local file system.

**Login**

HTML Login URL

**Responsibility**

One-to-One Fulfillment Administrator

**Prerequisites**

None

**Steps**

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

### 3.5.6 Assigning a Query to an Oracle Marketing Encyclopedia System Master Document

Use this procedure to assign a query to an Oracle Marketing Encyclopedia System master document.

**Login**

HTML Login URL

**Responsibility**

One-to-One Fulfillment Administrator

**Prerequisites**

None

**Steps**

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

### 3.5.7 Removing a Query From an Oracle Marketing Encyclopedia System Master Document

Use this procedure to remove a query from an Oracle Marketing Encyclopedia System master document.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

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

### 3.6 Viewing Oracle Marketing Online Collateral

Use the Template tab > Collateral sub tab to view a list of the collateral items (called "deliverables" in Oracle Marketing) that are available in Oracle Marketing Online. Collateral items are attached to Fulfillment e-mail.

### 3.7 Managing Oracle Marketing Encyclopedia System Queries

Use the Query sub tab to manage queries for Oracle Marketing Encyclopedia System Master Documents. These queries supply data for dynamic Oracle Marketing Encyclopedia System master documents.

#### **Tasks**

You can perform the following tasks:

- [Creating a Query](#)
- [Updating a Query](#)

- [Viewing Oracle Marketing Encyclopedia System Master Documents Associated With an Query](#)
- [Creating a Data Source File from a Query](#)

### 3.7.1 Creating a Query

Use this procedure to create a query.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

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

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

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

### 3.7.2 Updating a Query

Use this procedure to update a query.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

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

### 3.7.3 Viewing Oracle Marketing Encyclopedia System Master Documents Associated With an Query

Use this procedure to view a list of the Oracle Marketing Encyclopedia System Master Documents that use a query.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Query tab > Query sub tab.

The Queries page appears.

2. Click a query name link.

The Create Query page appears. The master documents that use the query appear under the Documents Using Query heading.

## **3.7.4 Creating a Data Source File from a Query**

Use the data source sub tab to download a list of merge fields for a query. The text file can be used by other tools, such as Microsoft Word, to create a master document that can be uploaded to Oracle Marketing Encyclopedia System.

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

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

Create a query.

### **Steps**

1. Click the Query tab > Datasource sub tab.

The Create Datasource page appears.

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

3. Click **Create**.

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

4. Use the Datasource file link to download the data source file.

5. To open the data source file, right-click the **Datasource file** link and choose Open.  
The Datasource appears in a separate browser window.
6. To save the data source file, right-click the **Datasource file** link and choose Save Target As.
7. Navigate to the desired save location.
8. Optionally, modify the file name.  
The save type should be Text Document.
9. Click **Save**.

## 3.8 Managing Content

This chapter explains the concepts to create cover letter content types and cover letters. Sections in this topic includes:

- [Cover Letter Overview](#)
- [Understanding Cover Letter Content Types](#)
- [Queries](#)
- [Creating and Managing Cover Letter Content Types](#)
- [Creating Cover Letters](#)

### 3.8.1 Cover Letter Overview

A cover letter is the document that is received by the customer. It can be defined as an outbound content sent to consumers about an offer. It is used to communicate about an offer, information or a message. Typically, a cover letter is created by marketers. It can contain attachments such as data sheets, white papers, analyst reports, press releases, and so on. The cover letters are fulfilled through e-mail, fax, and print channels.

The content is stored in Oracle Content Manager (OCM) central repository. The advantages of using OCM are that it:

- Ensures that the message is consistent, when executed through all channels of execution.
- Helps organizations to maintain the integrity of the content and keep track of its usage.

- Allows organizations to maintain control over the content by giving users the access permissions on folders, by creating content type groups, and by having approval process to approve the content.
- Restricts users to access the content by having access permissions on folders, creating content type groups, and approval process.

### 3.8.2 Understanding Cover Letter Content Types

A cover letter content type is like a setup template that you can use while creating a content. It provides best practices that enable you to create standardized content. It contains detailed information such as attributes, data types, and blocks that are required to create a cover letter. To enable this, few seeded content types are available. Only administrators can create content types.

While creating content types, you can:

- Restrict the content type to be made available to only certain groups by mapping them to content type groups such as e-mail, print, and fax.
- Decide to set default attributes for the cover letters.
- Set the attributes so they cannot be updated.
- Specify the style sheet to be mapped to the content type.
- Associate multiple style sheets to a content type. This feature enables users to view the content or attachments using any style sheet that is associated with it. Also, a default style sheet can be mapped to the content type.

Other users can duplicate the seeded content types and modify their structures by updating the attributes.

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**Notes:**

- If the content type is used to create a cover letter or is in In Progress status, you cannot update the content type.
  - To create cover letters and content type groups that are relevant to cover letters, you must use the options that are provided with Cover Letters and not the generic OCM UI.
  - only from this UI. Also, to map the content types to different groups, you must use this UI and not the OCM Content Type Groups UI.
- 
-

## Content Type Summary Page

In the Content Type Summary page, you can choose to view all, seeded, or inactive content types. The results are displayed in a tabular format listing the content type details such as the owner's name, its status, and so on.

### 3.8.2.1 Cover Letter Content Type Attributes

To create new content types, you can either copy seeded content types or create new ones based on the following attributes:

#### General

In this region, enter the name of the content type, select the status, and the content type group. Only if the status of the content type is active, you can select it to create cover letters. You can also select a default style sheet for the cover letter.

For more information on style sheets, see *Oracle Content Manager Implementation Guide*.

#### Header, Content Block, and Footer

You can use these regions to provide content in text format and images. Typically, the header and footer regions are used to provide corporate address, copyrights, contact information, terms and conditions, company logo, and so on. You can also define a default cover letter and set it so it cannot be updated.

If these regions are enabled, then while creating cover letters, users can select a live and approved version of the content from the repository based on their permissions.

#### Body

You can enter the HTML text for e-mails in this region. For non-HTML compliant users, you can display the content in text format. If the content type has a query associated with it, then you can choose to embed the merge fields. You can select one or more merge fields from the associated query to embed in the cover letter. These are written in SQL (Structured Query Language) format. Query items are stored in Oracle Content Manager (OCM) as cover letters of type Query.

Typically, queries are created and modified by the Marketing Administrators. For more information on Queries, see *Oracle Marketing User Guide*.

## Attachments

You can send attachments of any file type with e-mails and faxes. But only .rtf and .pdf file attachments can be printed.

In e-mails, you can send binary files as attachments. You can specify the attachment details in this region. If this region is enabled, then while creating cover letters users can search the attachments based on cover letter name, description, and that are associated with Products or Offers. The search returns all cover letters that are live and approved from the repository, based on the permissions that you have.

## 3.8.3 Queries

Queries are Structured Query Language (SQL) statements that generate selected data from a database. A query determines which records meet the defined criteria, and returns the matched records.

Queries are the source for the mail merge fields that can be embedded in the cover letter body. They are used to generate personalized tags for mail merge, which are fulfilled by Oracle One-to-One Fulfillment, at the time of execution. The Queries page lists all the queries. You can select an existing query to view the details or click the Create button to create a new query.

For details on queries, see *Oracle Marketing User Guide*.

### 3.8.3.1 Creating and Updating Queries

Use the following procedure to create and update queries.

#### Prerequisites

None

#### Steps

1. Login with the One-to-One Fulfillment Administrator responsibility and navigate to Content > Query.
2. Click **Create**.  
The Create Query page appears.
3. In the Name field, enter a unique name for the query
4. Optionally, in the Description field, enter a description for the query
5. In the Query SQL field, enter the SQL SELECT statement.

It is not necessary to a semi-colon (;) at the end of the SELECT statement.

6. Click **Create**.

The query is created with a status of In Progress.

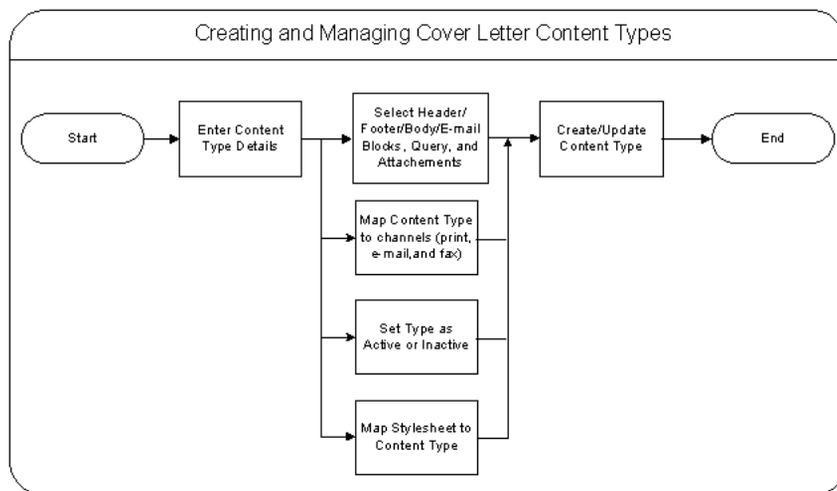
7. To update a query, select the query and click **Update**.

- You can update the queries with status In Progress and Submit for Approval.
- You cannot update the queries with status Approved.
- In the Update Query page, update the required fields and click **Update**.

### 3.8.4 Creating and Managing Cover Letter Content Types

Only administrators can create content types. The following figure depicts the process to create a cover letter content type.

**Figure 0-1** *Process to Create and Manage Cover Letter Content Types*



The preceding figure illustrates the following process:

- Map the content type to different groups such as e-mail, fax, and Print.
- Define the requirements for the cover letters, such as header, body, e-mail blocks, queries, and footer.

- Define if the blocks must be displayed and set the default values.
- Define if the content can be updated.
- Create active content types so that they are available to create cover letters.
- Specify the default style sheet for the content type.

The seeded style sheet (provided by OCM) is selected by default.

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**Notes:** Oracle recommends that you understand the requirements of your organization before you define the attributes for the content type. After a content type is used to create a cover letter, you cannot update it, you must first duplicate it and update the copy.

---

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Use the following procedure to create and manage cover letter content types.

### Prerequisites

None

### Steps

1. Login with the One-to-One Fulfillment Administrator responsibility and navigate to Content > Content Type.
2. Click **Create**.  
The Create Content Type page appears.
3. In the General region, enter details in all the mandatory fields.
  - Select the status to be active so that it is available to create cover letters.
  - Select the groups for which the content type must be available.
  - Select a default style sheet.
4. To define Header attributes for the content type, select the appropriate Display check boxes.
  - To default the content in the Header Block and Header Image regions, select a value from the Search list.
  - Select a value for the Updateable field from the drop-down list. While creating a cover letter, this field indicates if the default value can be updated by the user or not.

- Select a value for the Required field from the drop-down list. While creating a cover letter, this field indicates if this field must be a mandatory field.
5. To select a query for the mail merge in the body of the cover letter, select a query from the Search list.
6. To define a content block in the Content Blocks region, select a value from the Search list.
  - To default the content in the Content Block, select a value from the Search list.
  - Select a value for the Updateable field from the drop-down list. While creating a cover letter, this field indicates if the default value can be updated by the user or not. This is applicable for all the fields in other regions also.
  - Select a value for the Required field from the drop-down list. While creating a cover letter, this field indicates if this field must be a mandatory field. This is applicable for all the fields in other regions also.
7. To define Footer attributes for the Content Type, select the appropriate Display check boxes.
  - To default a content in the Footer Block and Footer Image regions, select a value from the Search list.
  - Select a value for the Updateable field from the drop-down list.
  - Select a value for the Required field from the drop-down list.
8. To define an attachment in the Attachments region, select a file from the Search list.
  - Select a value for the Updateable field from the drop-down list.
  - Select a value for the Required field from the drop-down list.
9. Optionally, to preview the selected attribute, click the Preview icon.
10. Click **Save**.

The cover letter content type is created.
11. To update a content type:
  - a. Select the content type and click **Update**.

The Create Content Type page appears displaying the content type details.
  - b. Update the required fields and click **Apply**.

The content type is updated.

12. To duplicate a content type:

- a. Select the content type and click **Duplicate**.

A duplicate copy of the content type is created.

13. To delete a content type:

- a. Select the content type and click **Delete**.

The content type is deleted.

### 3.8.5 Creating Cover Letters

To create cover letter contents you must:

1. Select a cover letter content type from the Create list and click the Go button.
2. Provide content details.

---

---

**Note:** The content type, which you select determines the content details that you must provide.

---

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#### Selecting a Content Type

You must select a content type from the Cover Letter Summary page. In this page, select a content type from the Create list and click the Go button. In this page you also:

- Sort content types based on the Content Type Group.
- List all the cover letters that are created using a particular content type.
- Search cover letters based on the owner, name, location, last update date, version, and description.

Cover letter contents are stored in folders. For more information on folders and permissions, see *Oracle Content Manager Implementation Guide*.

Use the following procedure to create cover letters.

#### Prerequisites

A content type must exist.

## Steps

1. Login with the One-to-One Fulfillment Administrator responsibility and navigate to Content > Cover Letter.
2. Select a content type from the Create list and click **Go**.

The Create Content page appears.
3. Enter name, description, owner, and location details in the respective fields.
4. In the Header region, select the values for content block and content image from the Search list.
  - This region is enabled only if it is defined while creating the selected content type. You can select cover letters of type Image or Content Blocks from a list of values. The search result lists all the cover letters that you have access, which are live versions.
  - If this region is enabled, then you can select images or content blocks for the body header.
  - While defining the content type, if the fields are defined as non-updatable fields, then you cannot update them. You can only view the defined values.
  - To add more content blocks and images, click **Add another Row**. The order in which you add the contents are maintained during execution.
5. In the Body region, enter the text for the e-mail and fax body.
  - You can enter the content for the e-mail in an HTML format. If the e-mail is for non-html clients, you can choose to display the e-mail content in text format by clicking **Edit Text Version**. The content created for Fax groups will display the content in HTML format.
  - If the content type has any query associated with it, you can insert mail merge fields based on the available fields, either individually or all at once.
  - Users can insert mail merge fields based on the available fields.
  - To add the query mail merge fields individually, select the query and click <. Optionally, to add all the queries for mail merge, click the double < symbol.
6. In the Content Blocks region, select a content block from the Search list.

You can add another content block in the Content Block region by clicking the Add Another Row button and selecting a content block from the Search list.

7. In the Footer region, select the values for content block and content image from the Search list.

You can add another content block in the Footer region by clicking the Add Another Row button and selecting a content block from the Search list.

8. In the Attachments region, select the file for the attachment from the Search list. All the files in the repository are displayed.

- You can search for attachments that are associated with Products or Offers, which are part of the campaign schedule. The search result lists all the cover letters that you have access and which are live versions.
- You can also upload attachments from the desktop. By default, the attachments are saved in the same folder as the cover letter. You can select a different folder for which you have the Create Item permission.
- You can add another content block by clicking the Add Another Row button and selecting a content block from the Search list.

9. In the Content Renditions region, you can upload .pdf file for e-mail content.

- This region is enabled only for Print groups.
- You can upload .pdf or .rtf files for as the print renditions for cover letters. The .pdf or .rtf files may contain merge fields which are related to the query associated with the cover letter.

10. Optionally, click **Save for Later**.

The cover letter is created with the status In Progress. This option enables you to create an item, and update it later.

11. Optionally, to preview the content, click **Preview**.

- You can preview a content, only if you have selected the **Save for Later** option.
- You can also preview the content in text format.

12. Click **Submit for Approval**.

The cover letter is submitted for approval.

### 3.8.5.1 About Submitting for Approvals

After submitting the cover letter content for approval, either one of the following happens:

- The cover letter is submitted for approval based on the status of the cover letter or any of the attachments.
- If any of the attachments are in Rework status or In Progress status, you cannot submit the cover letter content for approval.
- If all the attachments are approved, then the content goes through OCM Content Approval process. The status of the cover letter content changes to Submitted. You cannot update the content in this status.
- A cover letter is approved only after all its components are approved.

### 3.8.5.2 About Searching for Cover Letters

In the Cover Letter Summary page, you can narrow the search based on the content type groups, that is, e-mail, fax, and print. You can also search for cover letters based on the parameters such as cover letter name, description, folder location, and last update

The search returns all live versions of the cover letters for which you have read access permissions. The live versions are the latest approved versions of the item. There may be later versions of the item, which are In Progress status. You cannot update such items.

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---

**Note:** You must not edit the cover letter content types and cover letters in the generic OCM UI as the attributes may not be displayed correctly.

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## 3.9 Managing Fulfillment Requests

Use the Status sub tab to view the status of fulfillment requests that have not been completely processed.

### Tasks

You can perform the following tasks:

- [Viewing the Status of a Fulfillment Request](#)
- [Canceling a Fulfillment Request](#)
- [Pausing or Resuming a Fulfillment Request](#)

### 3.9.1 Viewing the Status of a Fulfillment Request

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

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Status tab.

2. Click the Status sub tab.

The Request Status page appears.

3. From the View list, select a view type.

You have the following options:

- Submitted: Requests that have been submitted to the Advanced Queue but not yet picked up by the Fulfillment Server.
- Re-submitted: Original Fulfillment requests that have been resubmitted to the Advanced Queue.
- In Process: Requests being processed.
- Previewed: This option is no longer in use.

4. Click a request identifier link.

The View Status page appears.

### 3.9.2 Canceling a Fulfillment Request

Use this procedure to cancel a fulfillment request that is in the queue or is being processed.

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---

**Note:** With the exception of mass requests, when the Fulfillment Server retrieves a fulfillment request from the request queue, the fulfillment request cannot be canceled.

---

---

**Login**

HTML Login URL

**Responsibility**

One-to-One Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Status tab > Status sub tab.

The Request Status page appears.

2. From the View list, select All, Submitted, Re-Submitted, or In Progress.

3. In the Action column of the request, click **Cancel**.

The page refreshes and the canceled request is no longer available.

To view the canceled request, see [Managing Fulfillment Request History](#).

### 3.9.3 Pausing or Resuming a Fulfillment Request

Use this procedure to pause or resume a fulfillment request that is in progress.

**Login**

HTML Login URL

**Responsibility**

One-to-One Fulfillment Administrator

**Prerequisites**

None

### Steps

1. Click the Status tab > Status sub tab.  
The Request Status page appears.
2. From the View list, select **In Progress**.
3. In the Pause/Resume column, do one of the following:
  - To temporarily stop a request, click **Pause**.
  - To continue a paused request, click **Resume**.

To view any jobs in the request that have already been processed, see [Managing Fulfillment Request History](#).

## 3.10 Managing Fulfillment Request History

Use the History sub tab to view the history of fulfillment requests that have been processed, successfully or unsuccessfully, by a Fulfillment Server.

### Tasks

You can perform the following tasks:

- [Viewing the Details of a Fulfillment Request](#)
- [Section 3.10.1, "Viewing the Details of a Fulfillment Request"](#)
- [Viewing Failed Fulfillment Requests](#)
- [Viewing a Partially Successful Fulfillment Request](#)
- [Correcting a Malformed E-Mail Job](#)
- [Viewing Job Details](#)
- [Resubmitting a Fulfillment Request](#)
- [Resubmitting a Job](#)
- [Deleting a History Entry](#)
- [Searching for a Fulfillment Request](#)

### 3.10.1 Viewing the Details of a Fulfillment Request

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

**Login**

HTML Login URL

**Responsibility**

One-to-One Fulfillment Administrator

**Prerequisites**

None

**Steps**

1. Click the Status tab > History sub tab.  
The Request Summary page appears.
2. From the View list, select which status of requests to view.
  - All
  - Cancelled
  - Failed
  - Partially Successful
  - Stalled
  - Successful

The page refreshes and lists all requests of the selected status.

- Request Identifier: Request identification number
- Server Name: Name of the server that processed the request
- Agent: Name of the agent who submitted the request
- Submitted: Date the request was submitted
- Completed: Date the request was completed
- Outcome: Outcome of the request: Successful, Failed, Partially Successful, Cancelled, and Stalled
- Parent Request Identifier: Request identification number and link to the original (parent) request
- Request Type: Single or Mass
- Channel: Email, Print, Fax, or Multi (such as fax and e-mail)

The Statistics group lists the following details.

- Fax
  - Sent: Number of fax messages sent
  - Not Sent: Number of fax messages not sent
- Print
  - Sent: Number of print items sent to the printer
  - Not Sent: Number of print items not sent to the printer
- Email:
  - Sent: Number of e-mail messages sent
  - Opened: Number of e-mail messages opened by the recipient. (The Count is displayed only if the relevant profile, Email Tracking is enabled.)
  - Unopened: Number of e-mail messages not yet opened by the recipient
  - Not Sent: E-mail message prepared but not sent
  - Malformed: Number of e-mail messages with invalid addresses
  - Do not contact: Number of e-mail messages whose recipients are flagged "Do not contact" in the Customer Database
  - Other Failures: Number of e-mail messages that could not be sent because of other reasons
  - Bounced: Number of bounced e-mail messages received for this request
  - Unsubscribed: Number of e-mail recipients who chose to unsubscribe from the e-mail recipients list
  - Resubmitted Malformed: Number of malformed e-mail messages that have been corrected and reprocessed
- The Content Details group lists information about the content:
  - Content ID
  - Content Number, the total number of content items. For example, a cover letter plus an attachment would be listed in two separate rows in the Content Details table. Content Number 1 would be the main content (the HTML or RTF form document) and Content Number 2 would be the static attachment.

- Content Name, with a link to view the content, such as an HTML or RTF file
  - Content Type, such as a query, HTML rendition, RTF rendition, collateral or data
  - Store, such as Oracle MarketView, Marketing Encyclopedia System, or Oracle iContent (Oracle Content Manager)
3. Click the number of a Request Identifier.  
The Request Details page appears.

### 3.10.2 Viewing Failed Fulfillment Requests

Use this procedure to see a list of failed requests.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Select the Status tab > History sub tab.  
The Request Summary page appears.
2. From the View list, select **Failed**.  
The page refreshes and lists the requests marked as failed in the Outcome column.
3. Click a Request Identifier number.  
The Request Details page appears. The Failure Details group shows the Outcome Description.

### 3.10.3 Viewing a Partially Successful Fulfillment Request

Use this procedure to see a partially successful fulfillment request.

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Select the Status tab > History sub tab.  
The Request Summary page appears.
2. From the View list, select **Partially Successful**.  
The page refreshes and lists the partially successful requests.
3. Click the number of a Request Identifier.  
The Request Details page appears.
4. In the Statistics group, click the linked number of the Not Sent items.  
The Failures page appears, listing each failed job and the reason for failure.

## **3.10.4 Correcting a Malformed E-Mail Job**

Use this procedure to correct an improperly addressed e-mail request.

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Select the Status tab > History sub tab.

The Request Summary page appears.

2. Click the Request Identifier number of the malformed e-mail request.

The Request Details page appears.

3. In the Statistics group, click the number that corresponds to Malformed.

The Resubmit Malformed Email Jobs page appears. The incorrect address is in the Email Address column.

4. In the Correct Email Address field, enter the e-mail address.

5. Click **Resubmit**.

The Request Summary page appears.

A new Fulfillment request will be submitted for each corrected e-mail that is resubmitted. The original request identifier appears in the Parent Request Identifier of the Request Summary page.

### 3.10.5 Viewing Job Details

Use this procedure to see job details, such as customer information, content, and failure details.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

Submit at least one job.

#### **Steps**

1. Select the Status tab > History sub tab.

The Request Summary page appears.

2. Click the number of the Request Identifier.

The Request Details page appears.

3. In the Job Details group, click the number of the Job.

The Job Details page appears, listing the following information groups.

- Customer Information:
  - Customer Identifier
  - Customer Name
  - Email Address: E-mail address of the recipient
  - Fax Number
  - Printer Address: Name of the printer to which the request was sent
- Content Details:
  - Content ID
  - Content Number, the total number of content items. For example, a cover letter plus an attachment would be listed in two separate rows in the Content Details table. Content Number 1 would be the main content (the HTML or RTF form document) and Content Number 2 would be the static attachment.
  - Content Name, with a link to view the content, such as an HTML or RTF file
  - Content Type, such as a query, HTML rendition, RTF rendition, collateral or data
  - Store, such as Oracle MarketView, Marketing Encyclopedia System, or Oracle iContent (Oracle Content Manager)
- Failure Details (Only applicable if the request was partially successful):
  - Channel: Email, Fax, and Print
  - Address: Email address, fax number, or printer
  - Reason: Cause for the failure

### 3.10.6 Resubmitting a Job

Use this procedure to resubmit a job that was sent unsuccessfully.

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---

**Note:** For Failed requests, if the Request Details page does not list Job Details, the request has failed before individual jobs could be specified. In such cases, it is not possible to resubmit jobs because none have been created.

---

---

## Login

HTML Login URL

## Responsibility

One-to-One Fulfillment Administrator

## Prerequisites

Submit at least one job.

## Steps

1. Select the Status tab > History sub tab.  
The Request Summary page appears.
2. Click the Request Identifier number of the malformed e-mail request.  
The Request Details page appears.
3. In the Job Details group, click the linked number of the Job.  
The Job Details page appears.
4. Click **Resubmit**.  
The Resubmit Job page appears.
5. From the Channel list, select Email, Fax, or Print.
6. In the Address field, enter the email address or fax number of the recipient, or enter the printer name.
7. Click **Resubmit**.

### 3.10.7 Resubmitting a Fulfillment Request

Use this procedure to resubmit a failed fulfillment request.

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Status tab > History sub tab.  
The Request History page appears.
2. In the Action column, click **Submit**.

### 3.10.8 Deleting a History Entry

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

#### **Login**

HTML Login URL

#### **Responsibility**

One-to-One Fulfillment Administrator

#### **Prerequisites**

None

#### **Steps**

1. Click the Status tab > History sub tab.  
The Request Summary page appears.
2. Optionally, from the View list, select which status of requests to view.
  - All

- Cancelled
- Failed
- Partially Successful
- Stalled
- Successful

The page refreshes and lists all requests of the selected status.

3. Click **Select** for the history entry that you want to delete.

4. Click **Delete**.

The selected history entry is removed from the list and the Request History page refreshes.

## 3.11 Searching for a Fulfillment Request

Use the Search sub tab to search for a fulfillment request that has been processed by a Fulfillment Server.

Use this procedure to search for a fulfillment request.

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

1. Click the Status tab > Search sub tab.

The Search page appears.

2. From the list, select the search type:

- Customer Name
- Customer Identifier

- Request Identifier
3. In the field, type the value for which to search.
  4. Click **Search**.

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

- The results display a summary of the Customer Identifier, Customer Name, Request Identifier, Job, and Job Outcome. Users can click the History Request Identifier number to view the Request Details, which displays a summary of the request (server name, submitted & completed times, agent who initiated the request, and the outcome code, statistics, content, and job summary).
- Users can click the job number to view the job details, which displays a summary of the job (customer information, content details, and any applicable failure details).

## 3.12 Using the Quick Find Feature

Use the Quick Find feature to find a Fulfillment-related item, such as a server or template.

### **Login**

HTML Login URL

### **Responsibility**

One-to-One Fulfillment Administrator

### **Prerequisites**

None

### **Steps**

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

- Server (1)
  - Status
  - Template
3. In the Quick Find field, enter the search criterion. The criteria are case sensitive, except for Request Status which must be typed in all capital letters. The Request Status types are:

(Type capital letters only):

- \* SUBMITTED
- \* RESUBMITTED
- \* PAUSED
- \* PREVIEWED
- \* RESUMED
- \* CANCELLED

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

4. Click **Go**.
- The Search Results page appears.
5. To view the details of an item in the search results, click the item link.
- The Details page appears.

### 3.13 Using Merge Fields

The Fulfillment Server code uses sets of merge field delimiters to determine whether a document contains merge fields. It searches for the left delimiter of each pair within the document text. When it finds a left delimiter, it tries to then pair it with a right delimiter. If it does not find the right delimiter, the next pair of delimiters is searched for, and so on, until either a complete merge field is found or the list of merge delimiters is exhausted.

Topics include:

- [Default and Wildcard Merge Delimiter Pairs](#)
- [Different Representations of the Same Character](#)

- [Using Encrypted Merge Fields](#)
- [Creating an RTF Form Document with Merge Fields](#)
- [Creating a PDF Form Document with Merge Fields](#)

### 3.13.1 Default and Wildcard Merge Delimiter Pairs

There are three sets of merge delimiters, the first of which is a wildcard pair. This first set can be overridden with the Java property flags 'merge.LeftDelimiterString' and 'merge.RightDelimiterString' (Java properties must be preceded with '-D' when part of the java command). You can also use the profile options JTF\_FM\_LMERGE\_DELIM and JTF\_FM\_RMERGE\_DELIM to select from a list of seeded merge delimiters. The other two sets are static and therefore always a part of the list. The list includes:

Left Delimiter	Right Delimiter	Description
&laquo;	&raquo;	ASCII alphabetic delimiter codes. These are the defaults for the wildcard pair.
&#171;	&#187;	ASCII numeric delimiter codes.
'\u00AB'	'\u00BB'	Unicode delimiter codes.

Some of these delimiters begin with an ampersand '&' and end with a semi-colon ';'. These are special characters that are recognized by HTML. In the case of '&#171;', it is interpreted by HTML as a character having the decimal numeric value of 171.

### 3.13.2 Different Representations of the Same Character

The Fulfillment Server allows multiple merge delimiters due to the way these characters are represented. Unicode characters are represented in hexadecimal values. HTML uses decimal values. So the left-pointing double angle quotation mark (guillemet) can be represented in decimal as "&#171;" or in Hexadecimal as '\u00AB' or even in Octal as '\253'. The Octal representation in Unicode is '\u00AB'. Some log files contain '\253' and '\273'. The Fulfillment Server needs to have each of these representations because it parses characters and character sequences. When you see the character a left-pointing double angle bracket in your Web browser, it might be represented by the character sequence &#171; in the HTML source. The fulfillment server parses this source and therefore parses the sequence '&' followed by '#' followed by '1' and '7' and '1' and ';'. The same is true

for any character sequence set with the flags 'merge.LeftDelimiterString' and 'merge.RightDelimiterString'.

The following table lists the different numeric character conversions of the default merge delimiters that are used by the Fulfillment Server.

Character	Decimal	Hexadecimal	Octal
left-pointing double < bracket (guillemet)	171	AB	253
right-pointing double > bracket (guillemet)	187	BB	273

### 3.13.3 Using Encrypted Merge Fields

Oracle One-to-One Fulfillment has encrypted merge fields. When an encrypted merge field is found, the server encrypts the merge value and then leaves the delimiters in place so that it can later be recognized and decrypted. The default string delimiters are:

- Left delimiter string `"*encrypt("`
- Right delimiter string `")*"`

You can override these strings with the Java property flags 'merge.LeftEncryptDelimiter' and 'merge.RightEncryptDelimiter'. You can also use the profile options JTF\_FM\_L ENCRYPT\_DELIM and JTF\_FM\_RE NCRYPT\_DELIM which only allow you to select from a list of seeded values.

### 3.13.4 Creating an RTF Form Document with Merge Fields

Use the following procedure to create Rich Text Format (RTF) form documents, containing merge fields, to use with the Oracle One-to-One Fulfillment native print function.

#### Login

Not applicable

## Responsibility

Not applicable

## Prerequisites

None

## Steps

1. In Microsoft Word, open a Word document. The document must have all necessary text, merge field references, and images.
2. Put the cursor on the highest Word toolbar, and click to open the mouse menu.
3. Select **Forms**.  
The Forms toolbar appears.
4. Highlight the first text that you want to be a merge field.
5. On the Forms toolbar, click **ab |** (Text Form Field).  
The text is highlighted.
6. Double click the highlighted text.  
The Text Form Field Options box appears.
7. In the Default text field, enter the display name of the form field.
8. Click **Add Help Text**.  
The Form Field Help Text box appears.
9. In the text field, enter the name of the merge field. The merge field name must be exactly the same the name or alias that is used in the SQL query and must be enclosed within "<?" and "?>", for example, <? FIRST\_NAME ?>. The merge delimiters must always be in upper case.
10. Click **OK**.  
The Form Field Help Text box closes.
11. In the Text Form Field Options box, click **OK**.  
The Text Form Field Options box closes. The highlighted text form field name appears.
12. For each merge field, repeat steps 4 through 11.
13. Save the document as a Rich Text Format file with an rtf file extension.

## Creating a Table with a Non-Repeating Row

The following table is an example of a table containing a non-repeating row.

Contact	Email Address	Status of Email	Date Processed
NAME	EMAIL_ADDRESS	STATUS	SENT_DATE

To include non-repeating data within an RTF document, use the following procedure.

### Steps

1. Insert a table, selecting the appropriate number of columns and one or two rows.
2. If required, enter the appropriate column header names.
3. Insert a text form field into the first cell of the second row (assuming there are column headers in the first row). To insert merge fields, see steps 4 through 11 above.
4. Repeat until there is a text form field in each cell of the row.

The following table is an example of how the table containing a non repeating row would appear in the printed document.

Contact	Email Address	Status	Date Processed
CHERYL LAWRENCE	Cheryl.Lawrence@vision.com	SENT	21-JAN-2003

## Creating a Table with Repeating Rows

A table with repeating rows of data enables multiple rows of data to be returned by a SQL query and presented in a table. The following table is an example of a table that contains repeating rows.

Contact	Email Address	Status of Email	Date Processed
row repeat NAME	EMAIL_ADDRESS	STATUS	SENT_DATE row repeat

### Steps

1. Insert a table, selecting the appropriate number of columns and one or two rows.

2. If required, enter the appropriate column header names.
3. Insert a text form field into the first cell of the second row. To insert merge fields, see steps 4 through 11 above
4. Repeat until there is a text form field in each cell of the row.
5. Add a new form field at the start of the second row (assuming there are column headers in the first row).
6. On the Forms toolbar, click **ab |** (Text Form Field).  
The text is highlighted.
7. Double click the highlighted text.  
The Text Form Field Options box appears.
8. In the Default text field, enter the display name of the form field, for example "row repeat".
9. Click Add Help Text.  
The Form Field Help Text box appears.
10. In the text field, use the for-each:<group name> command (surrounded by the <? and ?> delimiters) to indicate the start of the repeating group (in this case, a row), for example, <?for-each:row?>.
11. Click **OK**.  
The Form Field Help Text box closes.
12. In the Text Form Field Options box, click **OK**.  
The Text Form Field Options box closes. In the Word document, the highlighted text form field name appears.
13. Add a new form field at the end of the second row (assuming there are column headers in the first row).
14. On the Forms toolbar, click **ab |** (Text Form Field).  
The text is highlighted.
15. Double click the highlighted text.  
The Text Form Field Options box appears.  
In the Default text field, enter the same display name for the form field that was used at the start of the row, for example "row repeat"

**16. Click Add Help Text.**

The Form Field Help Text box appears.

**17. In the text field, use the end for-each command (surrounded by the <? and ?> delimiters) to indicate the end of the repeating group (in this case, a row), for example, <?end for-each?>.****18. Click OK.**

The Form Field Help Text box closes.

**19. In the Text Form Field Options box, click OK.**

The Text Form Field Options box closes. The highlighted text form field name appears.

The following table is an example of how the table containing repeating rows would appear in the printed document.

Contact	Email Address	Status	Date Processed
CHERYL LAWRENCE	Cheryl.Lawrence@vision.com	SENT	21-JAN-2003
CHERYL LAWRENCE	Cheryl.Lawrence@vision.com	SENT	29-JAN-2003
BRYAN WEBB	BRYAN.WEBB@vision.com	SENT	21-jan-2003
MICHAEL Z ROBERTSON	MICHAEL.ROBERTSON@vision. com	NOT SENT	21-jan-2003
MICHAEL Z ROBERTSON	MICHAEL.ROBERTSON@vision. com	SENT	28-jan-2003

**Creating a Repeating Table**

A repeating table can have multiple tables of data returned by a SQL query. The following table is an example of repeating rows.

```
mytable group
```

Contact	Email Address	Status	Date
NAME	EMAIL_ADDRESS	STATUS	SENT_DATE

```
mytable group
```

## Steps

1. Insert a table, selecting the appropriate number of columns and one or two rows.
2. If required, enter the appropriate column header names.
3. Insert a text form field into the first cell of the second row, by following steps 4 through 11 above.
4. Repeat until there is a text form field in each cell of the row.
5. Add a new form field just above the table .
6. On the Forms toolbar, click **ab** | (Text Form Field).  
The text is highlighted.
7. Double click the highlighted text.  
The Text Form Field Options box appears.
8. In the Default text field, enter the display name of the form field, for example "mytable group".
9. Click **Add Help Text**.  
The Form Field Help Text box appears.
10. In the text field, use the `for-each: <group name>` command (surrounded by the `<?` and `?>` delimiters) to indicate the start of the repeating group (in this case, a table), for example, `<?for-each:mytable?>`.
11. Click **OK**.  
The Form Field Help Text box closes.
12. In the Text Form Field Options box, click **OK**.  
The Text Form Field Options box closes. In the Word document, the highlighted text form field name appears.
13. Add a new form field just after the table.
14. On the Forms toolbar, click **ab** | (Text Form Field).  
The text is highlighted.
15. Double click the highlighted text.  
The Text Form Field Options box appears.

16. In the Default text field, enter the same display name for the form field that was used at the start of the row, for example "mytable group".

17. Click **Add Help Text**.

The Form Field Help Text box appears.

18. In the text field, use the end `for-each` command (surrounded by the `<? and ?>` delimiters) to indicate the end of the repeating group (in this case, a table), for example, `<?end for-each?>`.

19. Click **OK**.

The Form Field Help Text box closes.

20. In the Text Form Field Options box, click **OK**.

The Text Form Field Options box closes. In the Word document, the highlighted text form field name appears.

The following example shows how repeating tables would appear in a printed document.

Contact	Email Address	Status	Date
CHERYL LAWRENCE	Cheryl.Lawrence@vision.com	SENT	21-JAN-2003

Contact	Email Address	Status	Date
CHERYL LAWRENCE	Cheryl.Lawrence@vision.com	SENT	29-JAN-2003

Contact	Email Address	Status	Date
BRYAN WEBB	BRYAN.WEBB@vision.com	SENT	21-jan-2003

Contact	Email Address	Status	Date
MICHAEL Z ROBERTSON	MICHAEL.ROBERTSON@vision.com	NOT SENT	21-jan-2003

Contact	Email Address	Status	Date
MICHAEL Z ROBERTSON	MICHAEL.ROBERTSON@vis ion.com	SENT	28-jan-2003

The following examples are the repeating and non-repeating data scenarios that are supported by the RTF print feature:

- If "for-each" and "end for-each" appears in normal text, then the text between the tags/form fields will be repeated.
- If "for-each" and "end for-each" appears at a table's or multiple tables' start and end points, then the included table(s) will be repeated.
- If "for-each" and "end for-each" appears in a single table cell, then the text between the tags/form fields in the table cell will be repeated.
- If "for-each" and "end for-each" appears in two different cells but on the same row, then the single row will be repeated.
- If "for-each" and "end for-each" appears in two different table rows, then the rows between the tags/form fields will be repeated.

### Conditions

The following examples show conditions with tables or text to enable information to be displayed *only* if the condition is true.

#### **Example 3–1 Table Reference is False**

```
if references is false
```

Reference Document	Document Type	Date Required
row repeat DOC_NAME	DOC_TYPE	DATE_REQD row repeat

```
end if
```

#### **Example 3–2 Text Reference is False**

```
if references is false
REQD_REF_TEXT
end if
```

Use the following procedure to display a table if a particular condition is true.

1. Insert a table, selecting the appropriate number of columns and rows.
2. If required, enter the appropriate column header names.
3. Insert a text form field into the first cell of the second row. To insert merge fields, see steps 4 through 11 above. Repeat until there is a text form field in each cell of the row.
4. Add a new form field just above the table or text.
5. On the Forms toolbar, click **ab** | (Text Form Field).  
The text is highlighted.
6. Double click the highlighted text.  
The Text Form Field Options box appears.
7. In the Default text field, enter the display name of the form field, for example "if references is false".
8. Click **Add Help Text**.  
The Form Field Help Text box appears.
9. In the text field, use following condition command format to evaluate when the condition is true: `<?if:<merge field><condition>'<value>'?>`  
for example, `<?if:reference='false'?>`.
10. Click **OK**.  
The Form Field Help Text box closes.
11. In the Text Form Field Options box, click **OK**.  
The Text Form Field Options box closes. In the Word document, the highlighted text form field name appears.
12. Add a new form field just after the table or text.
13. On the Forms toolbar, click **ab** | (Text Form Field).  
The text is highlighted.
14. Double click the highlighted text.  
The Text Form Field Options box appears.
15. In the Default text field, enter the same display name for the form field that was used at the start of the row, for example "end if".
16. Click **Add Help Text**.

The Form Field Help Text box appears.

17. In the text field, use the end if command (surrounded by the <? and ?> delimiters) to indicate the end of the conditional text or table, for example, <?end if?>.

18. Click **OK**.

The Form Field Help Text box closes.

19. In the Text Form Field Options box, click **OK**.

The Text Form Field Options box closes. In the Word document, the highlighted text form field name appears.

The following examples show condition commands used around tables or text.

**Example 3–3 Table if Condition is True**

The following example shows how the table will appear if the condition is true.

<b>Reference Document</b>	<b>Document Type</b>	<b>Date Required</b>
United Kingdom Student Visa	Copy	5/18/04
United States Passport	Copy	5/18/04
High School Certificate	Original	3/27/04
Degree Certificate	Original	3/27/04

**Example 3–4 Text if Condition is True**

The following example shows how the text will appear if the condition is true.

Your application for the Bachelor of Arts in Fine Arts, Full Time study at the Belmont Campus requires that your Transcripts be submitted by June 1st, 2004. Please submit this item directly to the Admissions Office.

### 3.13.5 Creating a PDF Form Document with Merge Fields

Use the following procedure to create merge fields in an Adobe Acrobat PDF form document. Oracle One-to-One Fulfillment supports only Adobe Acrobat Version 5.

**Login**

Not applicable

**Responsibility**

Not applicable

**Prerequisites**

None

**Steps**

1. Do one of the following:
  - If the document is already a PDF file, then proceed to step 4.
  - If the document is a Microsoft Word file, then proceed to step 2.
2. In Microsoft Word, open the document that you want to use as a Fulfillment template. The document must not contain merge fields.
3. In the Word menu, select **Acrobat** or **Adobe PDF > Convert to PDF**.

The Acrobat progress indicator shows the status of the conversion of the Word file to a PDF file.
4. In Adobe Acrobat, open the PDF file.
5. On the Acrobat toolbar, click the Form Tool.
6. Place the cursor where you want create the first merge field, then click and drag the Form Tool to the size that you want the merge field to be.

The Field Properties box opens.
7. In the Name field, enter the name of the merge field. The name must be exactly the same as the form field name or alias in the SQL query, such as FIRST\_NAME. The merge delimiters must always be in upper case.
8. In the Appearance tab, select the text options for this field.
9. In the Options tab, select the text alignment.
10. Click **OK**.
11. For each merge field that you want to add, repeat steps 3 through 10.
12. Save the file.

## 3.14 Setting Up High Quality Printing

Use the following procedures to set up high quality Oracle printing.

### 3.14.1 Configuring the Printer

Use the following procedure to configure the printer for high quality Oracle printing.

#### **Login**

Not applicable

#### **Responsibility**

Not applicable

#### **Prerequisites**

None

#### **Steps**

1. Verify that you can print from the Fulfillment Server host. Create a test document such as a text file called `hello.txt` that contains simple text.
2. Identify the printer. You may need to ask the network administrator or system administrator the proper name or destination.
3. Use the proper executable to print the file `hello.txt`.
  - For UNIX or Linux, use the `lp` command.  
Example usage: `lp -d loc2-prt1-rm108 hello.txt.`
  - For Windows, use the `print` command.  
Example usage: `PRINT /D:loc2-prt1-rm108 hello.txt.`
4. Verify that the document printed successfully. The High Quality Printing Solution depends on printing by using the operating system command.
5. Download and install the third party tool XPDF. Depending on your operating system, you may need to download source and build an executable, although most operating systems already have images built.

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**Note:** Become familiar with the Pasta User's Guide. Under the Configuration File Options section it explains how to set up the preprocess option in the configuration file, `pasta.cfg`, to instruct Pasta to preprocess PDF files before sending them to the printer. Preprocessing involves running the file through the `pdftops` utility to convert the unprintable PDF file to the printer-recognized format Post Script.

---

---

6. Save the configuration.
7. Test the configuration. Using the same printer name that you used for the `lp` or `print` command, print a PDF file using `FNDPSTAX`. The `-pn` parameter is where you specify the printer name.

### 3.14.2 Setting Up a Pasta Print Server

Use the following procedure to set up a Pasta print server.

#### Login

HTML Login URL

#### Responsibility

One-to-One Fulfillment Administrator

None

#### Steps

1. On the Printer tab, click **Create**, to begin creating a Pasta print server. Print servers are primarily used for RightFax Printing, but are also used in High Quality Printing as a way to identify which printers are Pasta Printers.
2. In the Print Server Name field, enter a generic name such as Pasta Print Server.
3. From the Server Type list, select **Pasta**. For Pasta printers, no Connection String is necessary.
4. From the main Print Servers table, select the Pasta Printer.
5. On the Detail page, select **Create Printer** to add your Pasta printer to this print server grouping.

6. In the Printer Name field, enter a label or a user-friendly name that users will recognize. For example, if this printer is the printer installed in room 108, enter Room 108 Pasta Printer.
7. Optionally, enter a Description.
8. In the Network Name field, enter the same name that you used to print using lp or print and FNDPSTAX. This name is passed to the call to Pasta.
9. Click **Apply**.
10. If you plan to configure more than one Pasta printer, test each one using the previous steps before adding it to the Pasta Print Server that you created.

### 3.14.3 Verifying the Printer Configuration

After you have successfully tested and configured the printer, run a Fulfillment request. First create and upload the RTF template. When you have identified the document, submit a normal print request. For the printer address parameter, use the Network Name field from the Administration Console setup.

If you have installed the necessary 11.5.10 Fulfillment prerequisites, you will get a high quality printed version of the document that you sent to the printer. If you have not entered your printer Network Name in the Administration Console as a printer connected to a Pasta Print Server, the Fulfillment Server will behave as though the printer address is a RightFax printer. The request will fail if RightFax does not have a printer with the same name as the Network Name.

All documents submitted to a Pasta printer must be either PDF or RTF. If you have attachments such as text or HTML, the print request will fail because the Pasta printer will not accept these document types.

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# Glossary

## **Advanced Queue**

A mechanism within the Oracle database that is used by the Fulfillment APIs and Fulfillment Server to queue requests. Fulfillment APIs put requests into the queue. The Fulfillment Server pulls requests out of the queue.

## **agent**

An employee who uses Oracle software.

## **applications user**

Oracle Applications users are any employees with an Oracle Applications account. Their LOGIN is their user name and password.

## **bounce back**

The process of returning e-mail to the sending server because of an incorrect address (hard bounce back) or because the recipient's inbox is full (soft bounce back).

## **content item (cover letter)**

The cover letter authoring screen that allows the user to create and edit a cover letter that is based on the content type setup. A cover letter is the primary document that is sent to a customer by e-mail, fax, or print and mail. The user is able to specify a cover letter name, description, and the folder where the cover letter is stored. The following attributes are also available for cover letters:

- **Body/Details** - The user can enter an HTML body for the cover letter. If the content type has a query associated with it, the user is given a choice to embed the tags or merge fields into the HTML body. The user also has the option to specify a text part of the email. The text part will be read by non-HTML

compliant email clients. Fax requests will only use the HTML part of the content.

- Attachments – The user can search for file attachments from the repository, or upload an attachment from the desktop. By default the attachment is saved to the same location as the cover letter. The user has the option to specify another folder location in which user has the permission to create content.
- Renditions – The One-to-One Fulfillment Oracle print solution supports printing of PDF or RTF documents. These PDF or RTF documents may contain merge fields. The user can select PDF or RTF file from the desktop and upload it as the cover letter content.

### **content type**

The Content tab is the main work area for content administrators, who create content types which are the basis for cover letters (content items). Content types are the foundation of Oracle Content Manager. Content types define the structure of the content item through a set of attributes, and ensure content consistency. Before creating a content type, create the appropriate query to extract the dynamic data from the database that will populate the merge fields within a cover letter.

### **database connectivity file**

A text file that contains the connection parameters for the Oracle Applications database. It is created automatically when Oracle Applications is installed.

### **data source file**

A text file that contains tab-separated merge fields that have been obtained by a query.

### **dequeuing**

A process by which the Fulfillment Server retrieves fulfillment requests from a queue.

### **enqueueing**

A process by which a business application places fulfillment requests into a queue.

### **e-mail channel**

Requests sent by e-mail.

**employee**

A person who works for an enterprise. Employees have a database record that is created in the Human Resources Management System (HRMS) or, if HRMS is not in place at the enterprise, created as a smaller record in the Oracle CRM Resource Manager.

**fax channel**

Requests sent by fax.

**Fulfillment Administration Console**

The HTML interface for administrators to define and maintain the servers and the associated e-mail, fax and print servers. Administrator can define groups of agents and associate them with the defined servers. Oracle One-to-One Fulfillment supports two content repositories, Marketing Encyclopedia System (MES) and Oracle Content Manager (OCM), and provides administration HTML pages to create and upload content into each repository.

**fulfillment**

The process of compiling and distributing information to customers.

**fulfillment request**

The customer request that is processed. The request can be made up of a simple e-mail, merged e-mail, e-mail with attachments, and so on. A request starts when the Fulfillment APIs receive data. The request ends when the Fulfillment Server passes information to the Java mail APIs or to the Print or Fax Enabler.

**Fulfillment Server**

The multi-threaded Java server that processes Fulfillment requests by de-queuing them from an Advanced Queue.

**glue code**

Code that connects two components.

**Java**

A technology that is both a programming language and a platform.

**Java API**

The Java application programming interface. A large collection of ready-made software components that provides many capabilities, such as graphical user

interface (GUI) widgets. The Java API is grouped into libraries of related classes and interfaces known as packages.

**javac**

The Java programming language compiler.

**Java language**

An object programming language in which programs are both compiled and interpreted. Using the compiler, a program is translated into an intermediate language called Java bytecodes, which are platform-independent codes that are interpreted by the interpreter on the Java platform. The interpreter parses and runs each Java bytecode instruction on the computer. Compilation happens only once, but interpretation occurs each time the program runs.

**Java platform**

A software-only environment that runs on top of other hardware-based platforms. The Java platform has two components: Java Virtual Machine (Java VM) and the Java Application Programming Interface (Java API).

**Java Virtual Machine**

The base for the Java platform. It is ported onto various hardware-based platforms.

**malformed e-mail**

E-mail addresses that are incorrectly formed (such as a missing "@"). The resulting e-mail cannot be sent to the customer.

**mass request type**

Large volume One-to-One requests. For mass requests, the calling application passes a SQL query which when executed derives the list of e-mail addresses and fax numbers.

**master document**

An HTML file that contains the main content in a fulfillment item.

**Oracle Marketing Encyclopedia System**

A file repository that stores master documents and queries that are used to specify fulfillment content.

**multichannel**

Requests sent by more than one channel.

**OCM**

See Oracle Content Manager.

**(One-to-One) request**

Requests initiated by a calling application (such as Oracle Collections) to send one or more master documents or pieces of collateral to a customer.

**(One-to-One) job**

Requests that are comprised of one or more jobs (sub-requests) which represent the individual e-mail or faxes, and so forth, that are sent to a specific customer.

**opened e-mail**

E-mails sent by Oracle One-to-One Fulfillment that have been opened by the recipient.

**Oracle Content Manager**

A document repository for fulfillment content.

**physical request**

One-to-One physical collateral requests for Collateral kits. These Collateral kits are separated into individual collateral and an order created which has multiple order lines (one for each collateral) and multiple shipment lines if the request has multiple recipients.

**print channel**

Requests sent to a printer and then mailed to a customer.

**query**

A SQL (structured query language) statement that generates selected data from a database. A query determines which records meet the defined criteria, and which fields of those records are returned.

**queue**

A repository for messages. Queues are stored in queue tables. Each queue table is a database table and contains one or more queues.

**resource**

An employee whose record has been imported into the Oracle CRM Resource Manager, which provides a resource ID to make that person a resource who is

authorized to use CRM applications that require a resource ID. Typically, that resource is also a part of a resource group, which is a logical entity created in CRM Resource Manager to manage groups of resources. The group must have certain permissions (roles, and usages) associated with it, and all resources must have established roles and usages.

**sent e-mail**

E-mails sent by Oracle One-to-One Fulfillment.

**single request type**

One-to-One requests sent to a single customer.

**template**

A grouping of material that is useful but not required for distributing master documents and collateral. An Oracle Marketing Encyclopedia System template is a package of content that is compiled by the Fulfillment Server. The fulfillment request identifies the template being used to compile the content.

**unopened e-mail**

E-mails sent by Oracle One-to-One Fulfillment that have not yet been opened by the recipient.

**Unsubscribe option**

An option for e-mail sent by Oracle One-to-One Fulfillment that contain an "Unsubscribe" link, and in which the recipient (customer) has selected to not be contacted, either by e-mail or not at all.

**versioning**

Updating a content item by modifying an existing version or creating a new one. Each version can have the status of In Progress, Submitted or Approved. In Oracle Content Manager, multiple approved versions can exist, but only one version can be set as the live version.

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