

# Oracle® Setup Online

Concepts and Procedures

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## 1 Understanding Setup Online

Setup Online is a new Internet enabled application, part of the Oracle e-Business suite, designed to empower every customer to quickly align with their critical business processes using an intuitive, easy-to-use web based user interface. Setup Online aims to reduce complexity in the setup and administration process thereby reducing implementation and administration time, cost and risk.

Setup Online provides the following functionality:

- [Administrator Portal](#)
- [Aggregation of Setup Online Functions](#)
- [Pre-seeded Responsibility](#)
- [ERP Dependencies](#)

### 1.1 Administrator Portal

The Administrator Portal serves as a convenient starting point for company administrators. Built using the new Declarative Components Framework, the portal includes a number of bins that provide the user with a quick access to a variety of resources. The portal contains productivity tools such as easy access to setup functions and menu shortcuts for frequently accessed setup functions. In addition, convenient links to Oracle's Online Knowledge Centers provide administrators access to a wealth of online training and help information.

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## 1.2 Aggregation of Setup Online Functions

Setup Online leverages available self-service setup and administrative functions and aggregates them into different groups, providing convenient access to cross-application self-service functions. The aggregation also clearly identifies the components shared between products, thereby enabling administrators to pay special attention while completing common setup steps.

See also:

[Using Aggregate Setup Online Functions](#)

## 1.3 Pre-seeded Responsibility

Setup Online is delivered with a new seeded responsibility, Company Administrator, designed for a super-user responsible for setting up multiple CRM products. Each CRM product will be delivered with an Administration tab, developed in accordance with guidelines published as part of the Setup Online Self-service Setup and Administration Framework, that aggregates all the self-service functions for the product under a single tab. Setup Online will then aggregate all these self-service functions found under each product's Administration tab into the Company Administrator Responsibility. This will provide a single access point to all self-service functions, thereby allowing an administrator to effectively administer multiple products.

## 1.4 ERP Dependencies

Setup Online provides access to certain dependent ERP functionality through self-service screens developed by some of the product teams. For example, iStore product allows an administrator to create and maintain items using self-service functions.

## 2 Using Setup Online

Setup Online provides you the tools you need to quickly and easily set up the e-Business suite.

Refer to the following topics related to using Setup Online:

- [Using Aggregate Setup Online Functions](#)
- [Updating a Label](#)
- [Searching for Attributes](#)
- [Searching for Applications](#)

- [Searching for Regions](#)

## 2.1 Using Aggregate Setup Online Functions

Setup Online leverages the available self-service setup and administrative functions and aggregates them into different groups, providing convenient access to cross-application self-service functions. The aggregation also clearly identifies the components shared between products, thereby enabling administrators to pay special attention while completing common setup steps.

Current aggregate Setup Online functions include:

- **eMail Center**—Oracle eMC is a complete solution for managing both inbound and outbound email interactions with customers, partners, suppliers, employees and other entities that interact with an organization. eMC provides an agent with tools and capabilities to maximize their productivity and effectiveness.

For additional information and help in using Setup Online for eMC, refer to the *Oracle eMail Center Concepts and Procedures*.

- **Incentive Compensation**—Oracle Incentive Compensation provides a unique online application for the design, distribution, and administration of variable compensation plans. Based on logic that can be configured or modified by an end user, the application determines: which events are eligible for incentive payment, who should receive credit, and how those credits are calculated and paid.

For additional information and help in using Setup Online for Incentive Compensation, refer to the *Oracle Incentive Compensation Concepts and Procedures*.

- **Marketing Online**—Oracle Marketing Online is a database product designed to provide planning, tracking, analysis and reporting on an organization's marketing activities.

For additional information and help in using Setup Online for Marketing Online, refer to the *Oracle Marketing Online Concepts and Procedures*.

- **Sales Online**—Oracle Sales Online provides companies with the sales tools they need to manage customer, appointment, contact, and opportunity information throughout the entire sales cycle. In addition, this product supplies sales managers with accurate, real-time forecasts and reports to manage dispersed, mobile sales teams more effectively.

For additional information and help in using Setup Online for Sales Online, refer to the *Oracle Sales Online Concepts and Procedures*.

- **iStore**—Oracle iStore is an electronic commerce application that businesses use to sell products directly to customers over the World Wide Web. Businesses can customize Oracle iStore to set up an online store and integrate the front end order capturing system with the order fulfillment system. Using Oracle iStore, a business can create, manage, and personalize a powerful Web-based store in a secure and scalable environment.

For additional information and help in using Setup Online for iStore, refer to the *Oracle iStore Online Concepts and Procedures*.

- **Interaction History**—Oracle Interaction History tracks all customer-agent interactions and serves as a repository for the interaction data. By tracking all contacts between human or automated agents and existing or potential customers and customer systems, Interaction History supports the development of the 360 degree customer view for the user organization.

For additional information and help in using Setup Online for Interaction History, refer to the *Oracle CRM Application Foundation Concepts and Procedures*.

- **Resource Manager**—The Resource Manager provides lists of resources—as individuals, groups, and teams—for applications to access and manage their resources. Resources are defined as the employees, supplier contacts, parties and partners that are used by the different CRM components to accomplish business objectives.

For additional information and help in using Setup Online for Resource Manager, refer to the *Oracle CRM Application Foundation Concepts and Procedures*.

## 2.2 Updating a Label

The Regions Items page allows the administrator to update labels associated with the region items. In addition, the field names of the regions can be changed to meet specific business name conventions.

### Prerequisites

None

### Steps

1. In the Company Administrator Responsibility window, select **System** tab and choose the **Labels** subtab.
2. In the Labels window, select the **Labels** supportable.

The Labels window opens.

3. Optionally, in the Application field, enter the name of the application.

OR

Click the **Flashlight** icon to select an application (See [Searching for Applications](#)).

4. Optionally, in the Region Name field, enter the name of the region.

OR

Click the **Flashlight** icon to select the different regions available.

5. Optionally, in the Label field, select and enter some keyword for the label (See [Searching for Regions](#)).

6. Click **Search**.

The Labels Results window opens in a tabular format.

*Note: If the search returns no results, then you will be prompted with a message instructing you to change your search criteria and try your search again.*

### 2.2.1 Results Window for Labels

The Results window appears when you click Search in the Labels window. In this window you can update multiple region item labels at the same time.

*Note: Any changes made in the Results window will apply to all pages that use the region.*

*Note: Fields with an (\*) asterisk next to them are required fields*

**Table 1 Label Results**

Parameter	Description
Application	The application name.
Region Name	The region name.
Region Item Name	The region item name.
Attribute Name	The attribute name.
Length	The specified display length. <i>Note: It is highly recommended that you stay within the display length specified.</i>
Label	The label name.

## 2.3 Searching for Attributes

The Global page allows the administrator to update the attribute label, so that changes are reflected on all region items and object attributes that are instances of this attribute. In addition, the label names of the attributes can be customized to meet specific business name conventions.

### Prerequisites

None

### Steps

1. In the Company Administrator Responsibility window, select **System** tab and choose the **Labels** subtab.
2. In the Labels window, select the **Global** supportable.  
The Attributes window opens.
3. Optionally, in the Application field, enter the name of the application.  
OR  
Click the **Flashlight** icon to select an application name (See [Searching for Applications](#)).
4. Optionally, in the Name field, select and enter keywords.
5. Optionally, in the field next to the Name field, enter some keywords for the attribute name and from the drop-down list select the label in which you want the attribute to appear.
6. Optionally, in the field next to the Label field, enter some keywords for the attribute.
7. Click **Search**. The Results window opens with the specified entries in a tabular format.

*Note: If the search returns no results, then you will be prompted with a message instructing you to change your search criteria and try your search again.*

#### 2.3.1 Results Window for Attributes

In this window you can update multiple region item labels at the same time.

*Note: Any changes made in the Global window will apply to all pages that use the region.*

*Note: Fields with an (\*) asterisk next to them are required fields*

**Table 2 Attribute Results**

Parameter	Description
Application	The application name.
Attribute Name	The name of the attribute.
Style	The text style of the attribute.
Length	The specified display length. <i>Note: It is highly recommended that you stay within the display length specified.</i>
Label	The label of the attribute.

## 2.4 Searching for Applications

The Application LOV allows the administrator to search for applications available in the Oracle e-Business suite by specifying a search string.

### Prerequisites

None

### Steps

*Note: The Application Name is pre-selected if entered on the previous page.*

1. In the Application Name field, select and enter any additional keywords.

*Note: It is recommended that you enter some search criteria to speed up the search.*

2. Click **Go**.

The Results window opens. This page displays the search results.

3. In the Application window, select the application you want to view.

### 2.4.1 Results Window for Applications

The Results window appears when you click Search in the Applications window

**Table 3 Applications Results**

Parameter	Description
Application Name	The application name.
Application Code	The application code.

## 2.5 Searching for Regions

The Regions LOV allows you to select a region that was created in the system.

### Steps

*Note: The Application Name is pre-selected if entered on the previous page.*

1. In the Regions window, click the **Flashlight** icon.

The Regions Search window opens.

2. Optionally, in the Region Name field, select and enter any additional keywords.

*Note: It is recommended that you enter some search criteria to speed up the search.*

3. Click **Go**.

The Results window opens. This page displays the search results.

4. In the Application window, select the region you want to view.

### 2.5.1 Results Window for Regions

The Results window appears when you click the Search button in the Regions window. In this window you can update multiple region item labels at the same time.

**Table 4 Regions Results**

Parameter	Description
Application	The application name.
Region Identifier	The region identifier.
Region Name	The name of the region.
Object Name	The object name.