

# **Oracle® Email Center**

Implementation Guide

Release 12.1

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Oracle Email Center Implementation Guide, Release 12.1

Part No. E13594-04

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Primary Author: William Colburn

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# Send Us Your Comments

## **Oracle Email Center Implementation Guide, Release 12.1**

### **Part No. E13594-04**

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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# Preface

## Intended Audience

Welcome to Release 12.1 of the *Oracle Email Center Implementation Guide*.

This guide is intended for members of the vendor organization who are responsible for implementing and administering Oracle Email Center.

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

- The principles and customary practices of your business area.
- Oracle Email Center.
- Oracle Forms, Self-Service Web Applications, and Oracle Applications Framework.
- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*

See Related Information Sources on page x for more Oracle E-Business Suite product information.

## Deaf/Hard of Hearing Access to Oracle Support Services

To reach Oracle Support Services, use a telecommunications relay service (TRS) to call Oracle Support at 1.800.223.1711. An Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process. Information about TRS is available at <http://www.fcc.gov/cgb/consumerfacts/trs.html>, and a list of phone numbers is available at <http://www.fcc.gov/cgb/dro/trsphonebk.html>.

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## Structure

- 1 Introduction**
- 2 Dependencies and Integration Points**
- 3 Implementation Overview**
- 4 Implementation Tasks**
- 5 Administration Tasks**
- 6 Diagnostics and Troubleshooting**
- 7 Download Processor FAQs**

## Related Information Sources

### Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

## Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

## Guides Related to All Products

### Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

## Guides Related to This Product

### Oracle Email Center User Guide

Oracle Email Center enables supervisors to categorize inbound emails from customers, partners, suppliers, and employees into different queues, tag them, create interaction threading, analyze intent, and balance workload while routing them to appropriate agents. It enables agents to respond to emails using system-generated suggested

responses and standard templates and provides agents with a full featured console with cross application functionality. Integrated with Oracle Marketing, you can use Oracle Email Center to process campaign lists, expand the campaign content material, add tracking tags, send emails to addresses in the list, track responses and tie these into campaign effectiveness analysis.

## **Installation and System Administration**

### **Maintaining Oracle E-Business Suite Documentation Set**

This documentation set provides maintenance and patching information for the Oracle E-Business Suite DBA. *Oracle E-Business Suite Maintenance Procedures* provides a description of the strategies, related tasks, and troubleshooting activities that will help ensure the continued smooth running of an Oracle E-Business Suite system. *Oracle E-Business Suite Maintenance Utilities* describes the Oracle E-Business Suite utilities that are supplied with Oracle E-Business Suite and used to maintain the application file system and database. It also provides a detailed description of the numerous options available to meet specific operational requirements. *Oracle E-Business Suite Patching Procedures* explains how to patch an Oracle E-Business Suite system, covering the key concepts and strategies. Also included are recommendations for optimizing typical patching operations and reducing downtime.

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

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

### **Oracle E-Business Suite Concepts**

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

### **Oracle E-Business Suite CRM System Administrator's Guide**

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

### **Oracle E-Business Suite Developer's Guide**

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

integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

### **Oracle E-Business Suite Installation Guide: Using Rapid Install**

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12, or as part of an upgrade from Release 11i to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

### **Oracle E-Business Suite System Administrator's Guide Documentation Set**

This documentation set provides planning and reference information for the Oracle E-Business Suite System Administrator. *Oracle E-Business Suite System Administrator's Guide - Configuration* contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle E-Business Suite System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle E-Business Suite System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

### **Oracle E-Business Suite User Interface Standards for Forms-Based Products**

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

## **Other Implementation Documentation**

### **Oracle Applications Multiple Organizations Implementation Guide**

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operation units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

## **Oracle Approvals Management Implementation Guide**

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

## **Oracle Diagnostics Framework User's Guide**

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

## **Oracle E-Business Suite Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

## **Oracle E-Business Suite Integrated SOA Gateway Implementation Guide**

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

## **Oracle E-Business Suite Integrated SOA Gateway User's Guide**

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

## **Oracle e-Commerce Gateway Implementation Manual**

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

## **Oracle e-Commerce Gateway User's Guide**

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run

extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

### **Oracle iSetup User's Guide**

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

### **Oracle Product Lifecycle Management Implementation Guide**

This guide describes how you can define hierarchies of items using structure types, catalogs, and catalog categories, and define change categories and configure them for revised items or request lines. Oracle Product Lifecycle Management provides several predefined catalogs such as the Product Catalog, Asset Catalog, and the Service Catalog and predefined change categories such as change orders and ideas. Use this guide to learn how to define additional catalogs for browsing and reporting purposes and new change categories specific to your business needs. You can then learn how to set up users and responsibilities that provide or restrict access to these catalogs, catalog items, and change management objects.

### **Oracle Product Lifecycle Management User Guide**

This guide describes how to create and manage catalogs, create and maintain product attributes and attribute values, and manage item statuses and lifecycle phases. You can learn how to create change categories, create task templates for change orders, and create change management reports. In addition, you can use this guide to create roles, map roles to privileges, and maintain these roles.

### **Oracle Web Applications Desktop Integrator Implementation and Administration Guide**

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

### **Oracle Workflow Administrator's Guide**

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

## **Oracle Workflow Developer's Guide**

This guide explains how to define new workflow business processes and customize existing workflow processes embedded in Oracle E-Business Suite. It also describes how to define and customize business events and event subscriptions.

## **Oracle Workflow User's Guide**

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

## **Oracle XML Gateway User's Guide**

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

## **Oracle XML Publisher Administration and Developer's Guide**

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

## **Oracle XML Publisher Report Designer's Guide**

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.



## Training and Support

### Training

Oracle offers a complete set of training courses to help you master your product and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any 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 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 your product 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 Oracle server, and your hardware and software environment.

## Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

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# Introduction

This chapter covers the following topics:

- Oracle Email Center Overview
- Features
- Architecture
- Responsibilities
- Concepts

## Oracle Email Center Overview

Oracle Email Center is a comprehensive solution for managing high volumes of inbound email. 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 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.

## Features

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

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

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

## Architecture

This topic group contains the following topics:

Email Center Architecture, page 1-3

Oracle Email Center Components, page 1-6

## Email Center Architecture

This section describes the architecture of Oracle Email Center.

### 1. Oracle Applications database

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

- Marketing Encyclopedia System (MES) schema and programs
- Knowledge Management (KM) schema
- Customer Trading Community Architecture (TCA) schema
- Customer Interaction History schema
- The Email Center schema

- Local Message Store schema

The Local Message Store (LMS) is a set of tables within the Email Center schema used for storing MIME messages. The LMS is split into Primary and Secondary message stores internally.

- Email Center runtime and configuration schema
- Primary Message Store - Holds all emails that are currently in the "active" processing state in Email Center.
- Secondary Message Store - Holds all emails that are in "resolved," "sent," or "deleted" states.

### 2. Oracle internet Application Server (iAS) or Web Tier

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

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

This tier also includes the Outbox Processor. The Outbox Processor is essentially a queue for outbound emails. Requests to this queue come from auto-ack, auto-routing, and auto-reply. The Outbox Processor records the interaction in Oracle Customer Interaction History and archive a copy of the outbound email

prior to sending the email.

### **3. Oracle Email Center Agent Console**

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

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

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

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

### **4. Oracle Email Center Message Component**

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

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

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

### **5. Oracle Email Center Supervisor Console**

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

### **6. Oracle Email Center Administration Console**

This console is used for defining email accounts for Email Center and configuring

business rules for email processing. This set of screens enables administrators to configure define Email Center accounts, configure email processing rules, update Intents, assign agents to email accounts and publish response documents into the Marketing Encyclopedia System (MES).

## **7. Oracle Email Center Download Processor**

The Download Processor is a Java service that runs in the iAS, or middle, tier and acts as an inbox processor. It polls the Inbox folder of active email accounts for new incoming emails and copies the new inbound emails into the Local Message Store. The Download Processor checks only for new emails in the inbox of active accounts on the mail server.

Here are summary points about Download Processor:

- It is an Inbox processor.
- It is a java service running in the middle tier and controlled by Generic Service Management (GSM) Framework.
- It maintains its own jdbc connection pool and implements logging.
- It polls the Inbox folder of active email accounts for new incoming emails.
- It copies new inbound emails into Local Message Store (LMS).
- It is registered as Email Center Download Processor – Normal Mode service (Migration Mode also registered).
- Name – DP or ECDP.
- Internal Code Name – EMTA (Email Center Mail Transfer Agent).

Oracle Email Center automatically creates the following two folders on the mail server for every email account created in Email Center:

- Oracle Processed - The original incoming email is moved to the Oracle Processed folder from the Inbox folder after it has been successfully downloaded into the Local Message Store. Initially, this original email is stored on the mail server as well as a safety backup. For all other purposes of the Oracle Email Center, the email content in the Local Message Store is used.
- Oracle Retry - If the Download Processor cannot process an incoming email, then the email is moved into the Oracle Retry folder from the Inbox folder and requires an administrator's attention.

## **8. Oracle Email Center Message Access Layer**

The Message Access Layer contains a collection of the APIs that handle reading and

writing messages to the Local Message Store.

## **Oracle Email Center Components**

### **Email Center Message Component**

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

### **Email Center Agent Console**

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

### **Email Center Supervisor Console**

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

### **Email Administration Console**

The Administration console provides setup pages to guide an administrator through the implementation, configuration and administration process of Oracle Email Center.

### **Email Center Server Process**

The Email Center Server Process is a PL/SQL-based program that extracts information from an email message to perform the everything defined in the rules engine. This includes, for example, intent, classification, routing processes, and delivering email to the appropriate group of agents.

### **Oracle Application Foundation Modules**

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

## **Email Processing**

### **Inbound Email Processing**

The code has the following sequence of steps:



1. Inbound email arrives at the mail server to an email account that is monitored by Oracle Email Center.
2. The email message is copied to the Local Message Store by the Download Processor.
3. The Email Processing concurrent program causes email processing to begin - extracting themes/tokens from the body of the email message.
4. Oracle Email Center identifies the intent of the email.
5. The "Party" is identified based on the from\_address header.
6. Invokes rules engine:
  - The email is classified
  - Auto-delete rules are run against the email.
  - Auto-acknowledgement rules are run against the email.
  - Auto-processing is performed.
  - Auto-redirect rules are run against the email (internally or externally).
  - Auto-reply rules are run against the email.
  - Rules governing the suggested response document search are run.
  - Routing rules are run against the email and it is routed accordingly.

### **Outbound Email Processing**

Outbox Processing describes what happens to a message related to an interaction when an Email Center agent performs an action on the message, such as Send, Delete, Transfer, Reroute, and Resolve.

Messages that agents initiate are processed in real time and do not use Outbox Processor. Outbox Processor is necessary, however, to handle auto-processing actions such as auto-acknowledgements and auto-replies that can occur during inbound email processing.

The step of editing the Applications Context file can be done with the Oracle Application Manager.

Steps:

1. Login to Oracle Application Manager.
2. Click **Site Map**.

3. In the System Configuration region, click **AutoConfig**.
4. Click the Edit Parameters image for the Application Tier context.
5. On the System tab, expand the oa\_web\_server Title.
6. Ensure the value for the Email OutBox Processor s\_emailcenter\_comment is blank. If it is a pound sign (#), delete it.
7. Save any changes and regenerate the jserv.properties file.
8. Restart the middle-tier.
9. To test whether or not the Outbox Processor is running, login to Email Center Administration, go to **Monitoring > Outbox Processor > Status** and verify there is an Outbox Processor running.

## Agent Processing

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

1. From this page, the agent can either select an account and a classification to get a queued email or select an account and begin working on a previously fetched email. Agents can also compose a new message from an account.
2. When a queued email is selected, a new Message Component browser window is launched, and the message is displayed as a ready to edit Reply. Internally, the message ownership attribute is assigned to the agent.
3. At the same time, a draft reply message is created and cached in the database.
4. If the agent cannot answer the customer question it can be transferred to a manager or other subject matter expert using the Transfer button. Or, the agent can choose to reroute the message. Email Center provides the following reroute options:
  - reroute to a different account
  - reroute to a different classification
  - requeue the email

When an agent reroutes an email, the application excludes that agent from the list of agents to whom the email is rerouted. Similarly, if an email is placed back in the queue on more than one occasion, then any agent who has ever rerouted this email is excluded.

When rerouting to a different account or rerouting to a different classification, the email is reprocessed.

5. If the agent feels that no response is necessary, the inbound message can be deleted or marked as Resolved by selecting the LOV item in the Message Component actions menu.

**Note:** When an agent clicks the Delete button, the message is not actually deleted but is marked as Deleted in the Local Message Store. There a supervisor or administrator can review deleted messages prior to purging them.

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

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

7. Finally, if the agent is unable to complete the reply, then the message can be saved using the Save option. If the Save option is selected, then the draft message is copied to the Local Message Store. The next time the inbound message is selected out of the agent's inbox, the saved draft message will be restored and presented to the user.

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

When the agent is finished with the message, whether Transferring, Sending,

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

## Responsibilities

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

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

Responsibility	Function	Interface
Email Center Administrator	Enables you to configure Email Center via the Administration console and run concurrent programs.	HTML
Interaction History Administration JSP	Allows you to create custom reason codes and associate them with Email Center actions.	HTML
Email Center Agent Console	Enables you to view the email queues and their account inboxes via the Email Center Agent Console	HTML
Email Center Message Component	Enables you to preview emails, respond to incoming emails and compose new emails.	HTML

<b>Responsibility</b>	<b>Function</b>	<b>Interface</b>
Email Center Supervisor	Allows access to the Supervisor tab on the Agent console. This tab provides Email Center supervisors with a set of tools to better manage Email Center activities.	HTML

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

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

Oracle Email Center uses the following responsibilities:

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

Responsibility Name	Who Uses it	Responsibility Description
Email Center Agent Console	Email Center Agents	<p>This responsibility, along with the Email Center Message Component responsibility, must be assigned to all Email Center Agents.</p> <p>Allows access to the Email Center Agent Console. This console is used to:</p> <ul style="list-style-type: none"> <li>• Acquire inbound email from Message Queues.</li> <li>• Open Emails from Inbox.</li> <li>• Launch Message component for composing emails.</li> </ul>
Email Center Message Component	Oracle Email Center Agents Oracle TeleService Agents Oracle TeleSales Agents	<p>Allows access to the Email Center Message Component.</p> <p>Allows Email Center agents to:</p> <ul style="list-style-type: none"> <li>• View and respond to incoming emails.</li> <li>• View and either resend or respond to archived emails.</li> <li>• Compose new outbound emails.</li> </ul>

Responsibility Name	Who Uses it	Responsibility Description
Email Center Supervisor	Email Center Supervisors	<p>Allows access to the Supervisor console. This tab allows you to:</p> <ul style="list-style-type: none"> <li>• Monitor inbound email queues.</li> <li>• Preview, assign, reply to, or delete and message in the queue.</li> <li>• Balance workload by assigning agents to accounts and vice-versa.</li> <li>• Create, update, and publish documents into MES.</li> </ul>

## Concepts

Topics include:

- Auto-Create Service Requests, page 1-15
- Auto-Delete, page 1-16
- Auto-Redirect, page 1-16
- Auto-Reply, page 1-17
- Auto-Route to Agent, page 1-17
- Auto-Update Service Request, page 1-17
- Queue Access, page 1-17
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- Email Classifications, page 1-19
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## **Auto-Create Service Request**

Administrators can define an auto-processing rule to automatically create service requests. Administrators can select the service request type with which the service request will get created and also select which template will be used for email notifications sent from Email Center.

A service request is automatically created for an incoming email if it satisfies the assigned auto-processing rule conditions. A simple way that a service request is automatically created is that the content of the email body is included in service request notes. Oracle Email Center also provides an option to send a notification when the service request is created or updated.

Another type of rule, the Email Parser definition, provides information for much more complete automatic generation of service requests. This parses an inbound email and

extracts detailed information from it. Within this rule, administrators can define the following:

- Information that they want to extract from emails satisfying certain conditions
- Tags between which data is parsed
- The corresponding field on the Service Request schema to which this data is mapped

The parser definition rule has the same behavior as all the other rules that are defined in the Oracle Email Center application. These rules appear in the rules repository, and administrators can associate them with email accounts. If a parser definition and a create service request auto-processing rule are associated with an email account, then the information that is extracted from the inbound email based on the parser definition is transferred to the newly generated service request.

Service requests can be automatically created for emails from employees and contingent workers. If the auto create service request process fails, then the email can either be routed to an agent, a service request can be created for the default customer, or the email can be redirected to a specified email address. The option to redirect to a specified email address is only available for employee emails.

## **Auto-Delete**

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

## **Auto-Redirect**

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

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

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

## **Auto-Reply**

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

## **Auto-Route to Agent**

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

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

## **Auto-Update Service Requests**

Email Center agents can create a service request from the Email Center Message Component. The Service Request is associated with the incoming email and the SR number is tagged to the outbound response. Administrators can define rules for automatically updating a service request and the status code to be used. If the incoming email satisfies the conditions and if an SR number tag is extracted, then the corresponding service request will be updated to the status code selected by the administrator. As well, a template can be associated to the service request for sending out a notification as mentioned in the Auto-Create Service Request concept topic.

## **Queue Access**

Queue access is the ability of agents to see emails in an email queue and selectively pick those emails that they prefer to work on. They retain their ability to reroute or assign an

email from the message component.

Administrators can define whether an email account is enabled for queue access. If an email account is marked as enabled for queue access, then agents who have the proper permissions are able to selectively pick from all the queues under that account. In addition, administrators can enable queue access at the agent level. Therefore, administrators can allow a certain group of agents to pick from a particular queue. This gives administrators granular control over queue access for queues and agents.

The queue access functionality is enabled from the universal work queue access method in addition to the agent home page (HTML). As such, if a queue is marked as enabled for access, then agents can view the emails in the email queue by clicking the queue node.

## Default Customer

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

## Default Resource

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

## Document Retrieval

Oracle Email Center utilizes two document retrieval methods: keyword matching and MES category mapping. The Document Retrieval processing rule enables administrators to select which method they want to utilize for retrieving documents from the Knowledge Base. If "Keyword Matching" method is selected, then the administrator can:

- select either Knowledge Management or MES repository or both
- select categories within MES in which to scan for documents with matching

keywords.

### **Keyword Matching**

Keyword matching matches keywords extracted from the incoming email to keywords in documents stored in the knowledge base repositories. This method of document retrieval is an extension of Intent Analysis explained in the Intent Processing topic. Each "Intent" in Email Center has two lists of keywords associated with it. One set of keywords (Type "Q" for Question) is used to perform a match against the set of keywords (tokens or themes) extracted from the incoming email message and another set of keywords (Type "R" for Response) is used to perform a match against the index of keywords related to the documents stored in the knowledge base repositories.

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

### **MES Category Mapping**

This method of document retrieval is based on a mapping of the incoming email to a specific category in Marketing Encyclopedia System (MES).

MES category mapping is a simplified approach where each incoming email gets mapped to a category in MES based on administrator defined conditions. Different categories can be selected for different defined conditions using the rules engine. The documents stored in that specific category are then displayed to the agent in the descending order of their usage, with the most widely used document on the top of the list.

## **Download Processor**

The Oracle Email Center Download Processor is a Java service that runs in the iAS tier and acts as an inbox processor. It polls the Inbox folder of active email accounts for new incoming emails and copies the new inbound emails into the Local Message Store. The Download Processor checks only for new emails in the inbox of active accounts on the mail server.

## **Email Classifications**

Classifications are user-defined categories or queues in which email messages are placed depending on their properties and content. When you set up your Email Center system, queues are created for each of the classifications you define in your system. As email is received and categorized into an Email Center classification, the email message is placed in the queue for that classification. When an agent logs into the Email Center Agent Console, a list of email accounts, to which the agent has been given access, is displayed along with a list of the classification queues and the number of email

messages in each of the queues. If a queue does not contain any email messages, the queue will not be displayed to the agent.

Email Center uses Email Center classifications to categorize inbound email so that it can be automatically routed to specific groups of agents. The Email Administration functionality provides classification administration pages which enable the creation of classifications using classification rules. Email Center classification rules use classification keys and for each type of key a set of valid operators are available. Classification keys represent inbound email characteristics such as message size or received date. Multiple classification rules can be chained together using And or Or operations to create a classification. The classifications are associated with specific email accounts and are given a processing priority within their associated email account.

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

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

## Email Threading

Email threading links all of the emails associated with a particular issue in a single thread. When an agent views the email thread, the agent sees all the email interactions from both the customer and the agent relating to that issue. All the emails pertaining to the specific issue are captured and displayed to the agent in descending order of time. Email interactions appear similar to how they are displayed on the HTML Service Request page. The Thread tab of the message component provides access to this display.

## Execute Custom Procedure

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

## IMAP Server

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

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

Oracle Email Center can be integrated with any IMAP compliant email server.

## Intent Processing

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

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

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

## Knowledge Base Repositories

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

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

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

- Suggested response documents: Documents which are presented to the agent as suggestions for responses to incoming email.

- **Message format templates:** Documents which are predefined style sheets for Email Center agents to use when composing email messages.

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

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

## Local Message Store

The Local Message Store is a set of tables for storing Multipurpose Internet Mail Extensions (MIME) messages in the Email Center application schema. The Local Message Store contains two sets of tables:

- **The Primary Message Store** - This store contains all email messages that are currently in a processing state in Email Center. These are messages with a status of Active. When an email is either in a queue or currently with an agent, the email message resides here. Tables with the name IEM\_MS\* compose this store.
- **The Secondary Message Store** - This store contains all historic email messages. These are messages that have resolved, sent, or deleted statuses. After an agent either deletes or responds to an email message, the message moves here and its status changes to reflect the action taken on it. Tables with the name IEM\_ARCH\* compose this store.

## Merge Fields

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

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

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



In the following example:

- Dear ((\*CP\_TITLE\*)) ((?CP\_FIRST\_NAME?)) ((\*CP\_LAST\_NAME\*))

At the time agent selects document either for inserting or attaching into outbound email, values for merge fields CP\_TITLE and CP\_LAST\_NAME will be required, whereas a value for CP\_FIRST\_NAME will be optional.

**Email Center supports three types of merge fields:**

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

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

***Customer Data Available from Customer Detail Page***

Code	Description	Note
CP_LAST_NAME	Customer Last Name	PERSON_LAST_NAME from HZ_PARTIES table
CP_FIRST_NAME	Customer First Name	PERSON_FIRST_NAME from HZ_PARTIES table
CP_MIDDLE_NAME	Customer Middle Name	PERSON_MIDDLE_NAME from HZ_PARTIES table
CP_PREFERRED_NAME	Customer Preferred Name	KNOWN_AS from HZ_PARTIES table
CP_TITLE	Customer Title	PERSON_TITLE from HZ_PARTIES table
CP_2ND_TITLE	Customer Second Title	PERSON_ACADEMIC_TITLE from HZ_PARTIES table
CP_SUFFIX	Customer Suffix	PERSON_NAME_SUFFIX from HZ_PARTIES table
CP_EMAIL_ADDRESS	Customer Email Address	EMAIL_ADDRESS from HZ_PARTIES table

<b>Code</b>	<b>Description</b>	<b>Note</b>
CP_PRIMARY_EMAIL	Customer Primary Email Address	Data from HZ_PARTIES table
CP_PRIMARY_PHONE	Customer Primary Phone Number	Data from HZ_PARTIES table
CP_HOME_PHONE	Customer Home Phone Number	Data from HZ_PARTIES table
CP_WORK_PHONE	Customer Office Phone Number	Data from HZ_PARTIES table
CP_ADDRESS	Customer Address	Data from HZ_PARTIES table
CP_ADDR_LINE1	Customer Address Line 1	ADDRESS1 from HZ_PARTIES table
CP_ADDR_LINE2	Customer Address Line 2	ADDRESS2 from HZ_PARTIES table
CP_CITY	Customer Address City	CITY from HZ_PARTIES table
CP_STATE	Customer Address State	STATE from HZ_PARTIES table
CP_PROVINCE	Customer Address Province	PROVINCE from HZ_PARTIES table
CP_POSTAL_CODE	Customer Address Postal Code	POSTAL_CODE from HZ_PARTIES table
CP_COUNTY	Customer Address County	COUNTY from HZ_PARTIES table
CP_COUNTRY	Customer Address Country	COUNTRY from HZ_PARTIES table
CP_ORGANIZATION	Customer Organization	Data from HZ_PARTIES table

<b>Code</b>	<b>Description</b>	<b>Note</b>
CP_PARTY_ID	Party ID for the Customer	PARTY_ID from HZ_PARTIES table
CP_PARTY_NUMBER	Party Number for the Customer	PARTY_NUMBER from HZ_PARTIES table

***Contact Data Available from Contact Detail Page***

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

<b>Code</b>	<b>Description</b>	<b>Note</b>
CON_ADDRESS	Contact Address	
CON_ADDR_LINE1	Contact Address Line 1	
CON_ADDR_LINE2	Contact Address Line 2	
CON_CITY	Contact Address City	
CON_STATE	Contact Address State	
CON_PROVINCE	Contact Address Province	
CON_POSTAL_CODE	Contact Address Postal Code	
CON_COUNTY	Contact Address County	
CON_COUNTRY	Contact Address Country	
CON_ORGANIZATION	Contact Organization	
CON_PARTY_ID	Party ID for the Contact	
CON_PARTY_NUMBER	Party Number for the Contact	

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

***Agent Data Available from JTF***

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

***Miscellaneous Data***

<b>Code</b>	<b>Description</b>	<b>Note</b>
MD_CURR_DATE	Current Date	Current System Date
MD_CURR_TIME	Current Time	Current System Time

***Current Account Data***

<b>Code</b>	<b>Description</b>
ACCT_REPLY_TO	Current Account Reply To Address
ACCT_FROM_NAME	Current Account From Name
ACCT_FROM_ADDRESS	Current Account From Email Address
ACCT_SIG	Current Account Signature

***Current Inbound Message Data***

<b>Code</b>	<b>Description</b>
INB_EMAIL_ADDRESS	Inbound Message From Address

<b>Code</b>	<b>Description</b>
INB_SUBJECT	Inbound Message Subject
INB_TO	Inbound Message To Address List
INB_CC	Inbound Message Carbon Copy Address List
INB_SENT_DATE	Inbound Message Sent Date
INB_CLASSIFICATION	Inbound message classification

#### ***Auto Acknowledgement Merge Field Data***

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

2. Custom Merge Fields - These merge fields are defined by the administrator. A value for each custom merge field must be manually entered by the agent before inserting or attaching the associated document into an outbound email. At the time when a document is inserted or attached the custom merge field placeholder(s) will be dynamically replaced with the data entered by the agent for each one respectively.
3. SQL Merge Fields - These merge fields are defined by the administrator. SQL merge fields are automatically populated with information resulting from the execution of a document's associated SQL Query. All SQL merge fields used in a document

should correspond to column aliases of the Select statement portion of the document's associated SQL query. If bind variables are present in the Where clause of the SQL statement, the agent will be asked to enter valid values for them prior to executing the SQL query and, subsequently, auto-populating the document's SQL merge fields.

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

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

Dear customer,

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

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

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

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

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

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

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

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

## Notes

Email Center agents are provided with a menu of actions for handling email interactions. For example, an agent can compose/send a brand new email, transfer an inbound email to another agent, reply to an inbound email or simply delete an inbound email. In doing so, agents may want to record a justification or explanation of their actions and make this information available to other agents or to their supervisors who may work on or review the email interaction at a later time

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

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

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

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

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

- **Assign Reason** - Assign reasons provide an explanation of why an email message is being assigned to a particular user from a supervisor.
- **Delete Reason** - Delete reasons provide an explanation of why an email message is being deleted.
- **Internal Note** - Internal notes allow you to create an internal reminder to yourself or for another agent.
- **Reroute Reason** - Reroute reasons provide an explanation of why an email is being rerouted to another classification group.
- **Transfer Reason** - Transfer reasons provide an explanation of why an email is being transferred from one user to another.



## Oracle Text

Oracle Text, previously known as interMedia Text, is a component of the Oracle 8i and later versions of the Database. It provides a generic search, retrieval, and viewing capabilities for text. Email Center uses the Oracle Text application as part of its Intent analysis process. Oracle Text extracts a set of keywords from an incoming message and provides them to the Email Center Intent engine to identify the email intent. Once the intent for the email is identified, Email Center calls a Marketing Encyclopedia System (MES) API that searches the Oracle Text index on the knowledge base repositories to determine appropriate response documents.

## Oracle Text Processing

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

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

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

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

### Database Character Sets

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

### Oracle Text Default Stoplists

Oracle Text provides a set of default stoplists. Stoplists are lists of words which are not to be analyzed by Oracle Text. If a default stoplist exists for a language, it is used to

identify the words that the system ignores during the text processing.

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

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

## Service Requests

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

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

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

1. Automatic update of service requests

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

2. Automatic routing of email messages to a specific agent

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

## SMTP Server

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

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

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

## Spell Checker

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

Dictionaries for the following languages are available:

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

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

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

## Tags

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

Tags fall into two categories:

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

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

value of the key at run time.

After a custom tag is associated with an email account, every outbound email sent from that account automatically includes this tag.

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

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

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

## Using Email Center Editors

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

## Wrap-Up Reason

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

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

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



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## Dependencies and Integration Points

This chapter covers the following topics:

- Dependencies
- System Requirements
- Service Requests
- Email Center Enabling Business Applications
- Installing Oracle Email Center
- Accessing Oracle Email Center
- Related Documentation

### Dependencies

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

Email Center is dependent on following core components:

- Oracle Foundation, 12.
- Oracle Text 8.1.7.2 or later.
- Oracle Marketing Encyclopedia System.
- Oracle Knowledge Management (previously known as Solution Management System or SMS).

Email Center does not provide the ability to create or update customer data and profiles other than email contact points. For this purpose Oracle recommends that an Oracle business application such as Teleservice or Telesales be installed on site as well.

## Internet Message Access Protocol (IMAP) Server

Oracle Email Center can be used with any corporate mail server as long as the mail server is IMAP4 compliant.

Since Oracle Email Center only defines an email account, an administrator must create the physical email account on the mail server. Once the email accounts are defined on the mail server, the administrator can use the account management pages in Oracle Email Center to define the email accounts.

## Simple Mail Transfer Protocol (SMTP) Server

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

The Email Center Outbox Processor utilizes the SMTP server to send all outbound emails.

## Oracle Text

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

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

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



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

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

#### **Known Limitations**

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

#### **Platform Dependencies**

Ported to most major platforms.

## **Customer Interaction History (IH)**

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

An Interaction History record is created for every incoming and outgoing email. Every Interaction must be associated with a customer. Oracle Email Center tries to find a customer by matching the email address. If however a customer cannot be identified based on the email address, Email Center then assigns a default customer ID to the email. This default customer ID is defined while setting the site profile options.

## **Knowledge Base Systems (KB)**

Oracle Email Center uses the following two repositories:

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

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

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

## Concurrent Manager

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

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

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

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

- Rebuild Help Search Index - Used for rebuilding index for MES document repository.
- Email Center Download Processor Notifications - Starts Email Center DP notification workflow.
- Process Email Center Purge Requests - Purges emails from the system.
- Start Email Processing - Starts the email processing controller that spawns separate worker processes.
  - Email Processing Worker - This is the child process spawned by the above controller.
- Stop Email Processing - Stops all email processing workers.
- Start Email Center Migration - The controller program that spawn separate migration worker processes.

- Email Center Migration Worker - Worker threads for migration, spawned by the controller program.
- Stop Email Center Migration - This stops all migration workers.

## Resource Manager

Email Center uses Oracle Resource Manager to create resource groups of agents. These agent groupings can be based on many things, including specific areas of knowledge, or language skills.

## System Requirements

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

- Approximate sizes of Oracle Application installs
- What are the sizing requirements for this Oracle Applications release
- What are the system requirements for this Oracle Applications release
- System requirements for Apps
- What are the requirements for Applications installation
- Oracle Application Object Library
- Application Install
- PROD install
- TEST install
- VIS install
- Disk usage of an install of Oracle Application

## Service Requests

### Service Request Enabling Email Center

Oracle Email Center provides agents with the ability to create business objects such as a service request and at the same time provides message composing/viewing capabilities

to the business users such that every email interaction is recorded and archived.

Agents can create these service requests from within the Message Component, while viewing and responding to an incoming email or composing a new outbound email. The number for the created service request is then included in the tag appended to the subject of the outbound email. If the customer replies back, then the service request number is extracted from the tag and the service request status is automatically updated using a previously defined value.

## Creating/Enabling Service Requests from the Message Component

By default this feature is turned OFF. If the customer intends to use this functionality, set the IEM: Integration: TeleService Enabled system profile to "YES". Refer to the Setting Profile Options section for the steps to set system profile options. After this system profile is set to "YES", a "Service Request" container is displayed in the Message Component. This container provides the agent with the ability to create a service request, update it manually, and add notes to it.

## Automatically Creating a Service Request

Administrators can define auto-processing rules to automatically create service requests. Oracle Email Center has two basic actions that auto-processing rules can take in creating a service request—an action that does not use email parser definitions or an action that does. The email parser uses parser definitions to identify and extract data from structured email. The data maps to fields in a service request. The application then can build a service request if an auto-processing rule is set up to create a service request automatically.

For the action that does not use email parser definitions:

- Administrators can define an auto-processing rule to automatically create service requests. Administrators can select the service request type with which the service request will be created and also select which template will be used for email notifications sent from Email Center.
- A service request is automatically created for an incoming email if it satisfies the assigned auto-processing rule conditions. When a service request is automatically created, the content of the email body is included in service request notes, and only limited customer data is passed to the service request. Oracle Email Center also provides an option to send a notification when the service request is created or updated.
- Service requests can be automatically created for emails from employees and contingent workers. If the auto create service request process fails, then the email can be routed to an agent, a service request can be created for the default customer, or the email can be redirected to a specified email address. The option to redirect to a specified email address is available only for employee emails.

For the action that uses email parser definitions:

- Administrators define an auto-processing rule to automatically create service requests. Administrators make named email parser definitions and select one to use with a given auto-processing rule. Administrators can select the service request type with which the service request will be created and also select which template will be used for email notifications sent from Email Center.
- A service request is automatically created for an incoming email if it satisfies the assigned auto-processing rule conditions. When a service request is automatically created, the content of the email body is included in service request notes, and the assignment manager uses additional information from the email parser to better assign the service request to the right resource. Oracle Email Center also provides an option to send a notification when the service request is created or updated.
- Service requests can be automatically created for emails from employees and contingent workers. If the auto create service request process fails, then the email can be routed to an agent, a service request can be created for the default customer, or the email can be redirected to a specified email address. The option to redirect to a specified email address is available only for employee emails.

## Automatically Updating a Service Request

When a service request is created from a message component the service request number is included in the tag that is appended to the corresponding outbound email. When the customer replies back, the service request number is then extracted from the tag and can be used to update the service request automatically.

Oracle Email Center provides a auto-processing rule called Auto Update Service Request. When defining this rule, administrators must select a specific service request status code. Administrators also select which template to use for email notifications sent from Email Center. When Email Center automatically updates the service request, the status of the service request will change to the status chosen by the administrator for the Auto Update Service Request rule.

You can also create custom status codes (for example, to explicitly notify an agent when a customer replied to the service request email).

## Email Center Enabling Business Applications

The Oracle TeleSales and Oracle TeleService applications are integrated with Email Center to provide their agents with the Email Center Message Component for viewing archived emails and composing new emails. The advantage of using the Email Center Message Component is that the business application can pass data pertaining to the email header fields, customer, or contact against whom the interaction should be recorded; as well as locate the appropriate document to be used as the template for composing the email and for all merge fields used within the document. Using the data

values passed, the compose email page is automatically populated so that the sales agent only needs to view the formatted email, add a comment if desired, and click "Send." The Message Component will then record the interaction and archive a copy of the outbound email as well.

Oracle Teleservice provides access to the Message Component from the Contact Center form and from Service request Form. You can launch the Email Center Message Component by either:

- Double-clicking the email address displayed in the field.
- Clicking the email icon next to the email address field or clicking the Compose email icon displayed in the tool bar.

The following Service profiles pertain to the Email Center Integration.

- Service: Enable Outbound Email in Service Request (**Yes** enables the integration).
- Service: Default Email Category (The template category displayed in Compose email screen when launched from Service Request form).
- Service: Default Email Template (Email body automatically populated with the contents of this template – can use merge fields)
- Service: Enable defaulting CC field in the email header while sending an email in Service Request form. (Automatically populates the CC field with the contact points for other contacts on service request.)
- Service: Subject Prefix for Outbound Email in Service Request. (Prefixes the subject for emails).

Refer to the corresponding E-Business Suite application's Implementation Guide for details pertaining to their system profile settings and other configuration requirements.

### **Environment Setup:**

Since the Email Center Message Component functionality relies on the Email Center infrastructure, your environment must be set up to support Oracle Email Center. This process includes setting up Email Center and creating email accounts.

### **User Setup:**

For a business application user to be able to use the Oracle Email Center Message Component, the user must be assigned the specific responsibility and be assigned to at least one email account. Perform the following steps to enable business application users to use the Email Center Message Component:

#### **Steps**

1. Create a different email account if desired. Refer to Section 5.8 for creating an email account.

2. Assign the "Email Center Message Component" responsibility to the predefined business application user. Refer to Section 5.9.2 for assigning responsibilities to users.
3. Assign the business application user with the corresponding email account. Refer to Section 5.9.5 for assigning email accounts to agents.

### Integration Troubleshooting:

You can perform the following tasks to troubleshoot your integration:

- Unable to Launch Message Component from Oracle Business Suite Application, page 2-9
- Error When Opening a Message in the Message Component., page 2-10

### Unable to Launch Message Component from Oracle Business Suite Application

**Indication:** The agent is unable to launch the Email Center Message Component from the business application.

**Solution:** Check the following:

This step should have already been performed in the business application calling the Message Component. Perform the following steps as a validation check to ensure that the single sign-on function for launching the Message Component (IEM\_MC\_LAUNCHER) is included in the menu structure.

The steps listed below apply to all Forms based applications only. The prompt for this function in the menu structure is kept blank to disable the user from selecting it directly.

#### Login

Forms Login URL

#### Responsibility

System Administration

#### Prerequisites

None

#### Steps

1. Under the Functions tab, double-click **Application**.
2. Double-click **Menu**.
3. Under the View option in the menu bar, select **Query by Example** and click **Enter**.  
The window is now in the query mode.

4. Enter the name of the menu from which the Message Component is launched.
5. Under the View option in menu bar, select **Query by Example** and click **Run**.  
The details pertaining to that menu are now displayed.
6. Verify that IEM\_MC\_LAUNCHER exists in the list of functions with a blank Prompt field.

#### **Error Occurs When Opening a Message in the Message Component**

**Indication:** Upon invoking the Message Component from Forms, a browser window opens with an error rather than the Message Component.

**Solution:** Make sure your user has the Email Center Message Component Responsibility.

## **Installing Oracle Email Center**

You install Oracle Email Center by performing the Oracle Applications Rapid Install process.

The Rapid Install is intended for customers who are installing Oracle Applications for the first time or upgrading to Release 12 from earlier releases.

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

## **Accessing Oracle Email Center**

Oracle Applications uses two different technology stacks:

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

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

The product interfaces are accessed by providing the Uniform Resource Locator (URL) for the environment in an Oracle Applications 12-compliant Web browser and navigating to the hyperlink for the login page for the specific technology stack. You can also provide the URL for the specific login page. This URL is referred to as your login URL.



### Oracle Applications URL

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

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

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

### CRM Home Page URL

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

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

### Personal Home Page URL

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

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

### Forms URL

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

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

## User Accounts

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

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

- Username: sysadmin
- Password: sysadmin

An application user enters a username along with a password to sign on to Oracle

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

## Related Documentation

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

- *Oracle Marketing Implementation Guide*
- *Oracle Marketing User Guide*
- *Oracle TeleSales Implementation Guide*
- *Oracle TeleSales User Guide*
- *Oracle Universal Work Queue Implementation Guide*
- *Oracle Universal Work Queue User Guide*
- *Oracle Collections Implementation Guide*
- *Oracle Collections User Guide*
- *Oracle Customer Interaction History Implementation Guide*

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## Implementation Overview

This chapter covers the following topics:

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

### Process Description

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

This topic group contains the following:

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

### Implementation Task Sequence

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

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

#### Installation

**Step 1:** Auto install CRM Applications.

**Step 2:** Post install steps.

**Step 3:** Installation Check Point

## **Configuration**

**Step 1:** Create a Default Customer.

**Step 2:** Create user with access to the Email Center Administration Console and Monitoring Administration.

**Step 3:** Set System Profiles.

**Step 4:** Set Site Profiles.

**Step 5:** Configure email accounts on an IMAP compliant email server.

**Step 6:** Define corresponding email accounts in Email Center.

**Step 7:** Create user accounts for Email Center agents.

**Step 8:** Define Resource Groups.

**Step 9:** Configuration Check Point.

## **Rules**

**Step 1:** Create email processing rules.

**Step 2:** Associate processing rules with email accounts.

**Step 3:** Rules Check Point.

## **Business Data**

**Step 1:** Create intents and keywords.

**Step 2:** Enable intent processing.

**Step 3:** Create hierarchical categories in MES.

**Step 4:** Create queries to populate merge fields.

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

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

**Step 7:** Business Data Check Point.

## **Oracle Email Center Administration Overview**

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

Topics include:

- Email Accounts, page 3-3
- Email Processing Rule Types, page 3-4
- Intents, page 3-14
- Email Parser, page 3-14
- Email Tags, page 3-17
- Knowledge Bases, page 3-19
- Resource Manager, page 3-20

## Email Accounts

To receive email messages in your Email Center, you must create email accounts on your IMAP compliant email server. Once created on the email server, these email accounts must be defined in Email Center.

Email accounts can be defined in Email Center as "Internal" or "External". External accounts are defined to receive emails from external parties such as customers, partners, resellers, and so on. Internal accounts are set up to receive emails from internal employees. The sender's email address for emails received in External email accounts are mapped against all email contact points stored in the TCA schema. However, for emails received in Internal email accounts, the sender's email address is mapped against all email addresses stored in the HRMS schema. Since these employee records cannot be searched or viewed in the Email Center Message Component, we recommend that Internal email accounts should only be used for automated email processing flows.

Email accounts defined in Email Center can be set to either "Active" or "Inactive" status. The Download Processor only monitors the Active email accounts while checking for new emails. Email Center agents can continue to acquire and respond to emails that have already been queued in the Inactive emails accounts, however, no new emails will be received unless the status of the email account is switched to "Active".

When you set the status of an email account to "Active", Email Center performs validation checks on the email account name, user name, account password, host name, and port number. Also, for its own internal processing, Email Center requires that each email account contain Oracle Processed and Oracle Retry folders. If these two folders are not already present, then Email Center will automatically create them upon account activation.

Email Center no longer requires special system folders such as Sent, Deleted, and Resolved, nor does it require the Unclassified folder and a folder for every classification associated with the email account. The various attributes of the email such as state, classification, and so on are now recorded in specific columns within the Local Message Store.

As well, the "Intent" and "Acknowledgement" accounts are no longer necessary. Email Center administrators can now create intents with corresponding keywords from within the Email Center administration console rather than build a keyword list by sending sample emails to an "Intent" account. The acknowledgment emails can now be easily separated from actual responses within the Local Message Store by recording a corresponding value in the email type column, thus eliminating the need for an "Acknowledgment" account.

## Email Processing Rule Types

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

1. **Classification** - This rule type determines the classification or category of an email. Each classification associated with an email account translates to a unique queue of email displayed to an agent while acquiring email messages. Customers can use Classifications to either prioritize the email or help agents differentiate between the intent of various email. If an email message does not meet the criteria for any of the classification rules associated with the email account, then the email is displayed in the "Unclassified" queue.
2. **Auto-Delete** - This type of rule pertains to automatically deleting incoming emails such as bounced messages or spam without processing it.
3. **Auto-Acknowledge** - This type of rule pertains to sending an auto-acknowledgement to the sender of the email.
4. **Auto-Processing** - This type of rule pertains to processing actions that are performed automatically on the incoming email such as create a service request or execute a custom procedure. This rule type can be used to automatically create a service request from an inbound email. An auto-processing rule to create a service request can include an email parser definition.
5. **Auto-Redirect** - This type of rule pertains to automatically redirecting emails to different accounts.
6. **Auto-Reply** - This rule type pertains to either automatically replying to an incoming email using specified documents or redirecting it to a different email address (not forward - retaining original header info).

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

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

Classification Rules, page 3-11

Auto-Delete Rules, page 3-11

Auto-Acknowledge Rules, page 3-11

Auto-Processing Rules, page 3-11

Auto-Redirect Rules, page 3-12

Auto-Reply Rules, page 3-12

Document Retrieval Rules, page 3-13

Routing Rules, page 3-13

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

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

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

Ultimately, the incoming email will either be:

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

## Key Descriptions

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

If a key is not present, a value of "null" is being passed to the calling procedure. Therefore, there is only one way to verify the existence of a particular key, for example: "<Key> is not null".

### Rule Engine Keys

Key Name	Internal Name	Description	Comments
Agent ID	IEMNAGENTID	This tag is available in case of replied email. The agent ID is the resource ID of the agent who sent out the original email.	
All Intents	IEMSALLINTENTS	The concatenation string of all the intents to which inbound email are mapped.	
Classification		Classification name as determined by the "Classification" rules. When an incoming email is classified under the defined classifications, the classification name is then available for rule declaration. Thus, this key is NOT available while defining "Classification" rules.	
Contact ID	IEMNCONTACTID	The contact ID of the customer. If the email is from an email address listed to a single identifiable customer contact in TCA, this key is available.	



Custom workflow Return Value	IEMSCUSTOMWFVAL	The return value passed by custom workflow engine	
Customer ID	IEMNCUSTOMERID	The party ID of the customer	If the email is from an email address listed to a single identifiable customer (party) in TCA, this key is available. In the case of a no match situation, the key has a value of -1 and in the case of multiple match situation, the key has a value of 0.
Email Top Intent	IEMSEMAILINTENT	The top intent, the intent with the highest score, of the email as determined by the Email Center Intent Engine processing.	
Language	IEMSLANGUAGE	The language of the inbound email as specified in the email extended header. The value for this key depends on the originating email system. For example, if the email originated from a Netscape Messenger email system, the value could be "EN" which specifies that the originating email system uses the English language.	This is a non standard value as it is email client dependent. Oracle does not suggest using this key unless you are sure about the value.
Message Size (in Bytes)	IEMNMESSAGESIZE	The size of the email message in Bytes, including any attachments.	

Organization	IEMSORGANIZATION	The organization information of the email client used by the sender. This value is picked up from the email extended header.	This is a non standard value as it is email client dependent. Oracle does not suggest using this key unless you are sure about the value.
Priority	IEMSPRIORITY	Priority of the email	In earlier releases, this value was passed from Oracle Email Server with possible values of: "High", "Low", and "Normal". Since this value is determined by the email client of the sender, it is not very predictable. For this release, Oracle has set a fixed value of "1" for this column.
Received Date	IEMDRECEIVEDDATE	The system date when the email was received from the sending email client.	
Received Time (hh24:mm:ss)	IEMTRECEIVEDTIME	The system time, in the format of (hh24:mm:ss), when the email was received from the sending email client.	
Score Percent	IEMNSCOREPERCENT	The score percentage associated with the top email intent as received from the Email Center intent engine.	
Sender's Email Address		The complete value of the sender email address, such as John.Smith@customer.com.	

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Service Request ID	IEMNBZTSRVSRID	This key is available in the case of replied email, if a service request is created for the original email.
Subject	IEMSSUBJECT	The subject of the email picked up from the email subject line.
System Date	IEMDSYSTEMDATE	The current system date when processing occurs.
System Time (hh24: mm:ss)	IEMTSYSTEMTIME	The current system time, in the format of (hh24: mm:ss), when classification processing occurs.
To Address	IEMSTOADDRESS	To Address for the Inbound Email

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

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

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

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

- Date format: dd-mon-yyyy. If you enter the value in a different format, Email Center attempts to convert it to this format.
- Time format: hh24:mm:ss, where "hh24" is a two digit number (00-23) representing an hour based on a 24 hour clock; "mm" is a two digit number (0-59) representing the minutes; and "ss" is a two digit number (0-59) representing the seconds.

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

from a time clock.

### Internal Keys Available for Customized Processing

Key Name	Internal Name	Description	Comments
[Custom Tag] < Name of Custom Tag>	Name of the Custom Tag will be the internal key name	This value is passed as a part of key value pair available as a pl/sql table to the custom procedure.	The number of available custom tags is determined by the number of custom tags you create and associate with the email account.
Message Id	IEMNMESSAGEID	This is the internal Email Center message ID.	
Media Id	IEMNMEDIAID	This is the value of the Inbound Media ID that was created as part of email processing.	
Interaction Id	IEMNINTERACTIONID	This is the value of the Inbound Interaction ID that was created as part of email processing.	

### Applying a rule to "all" incoming emails

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

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

The "All Emails" only applies to emails received in the email account to which the rule is associated. If for a given account, you have multiple rules within a rule type then in

general you should assign a low priority to a generic rule that applies to "All Emails". The more specific rules should be assigned a higher priority.

## **Classification Rules**

Classification rules help categorize the email based on either the "static" key values selected or the outcome of a "dynamic" procedure. Upon successful execution of the classification rule, the email message is displayed to the agent in a unique queue of email messages. If none of the classification rules associated to an email account are satisfied, then the email is displayed in the "Unclassified" queue.

## **Auto-Delete Rules**

Auto-delete rules allow the automatic deletion of inbound emails without processing them. If the criteria in an auto-delete rule is met by an incoming email message, further processing of the email is terminated and the email status is set to "Delete" and the message is moved from the Primary Message Store to the Secondary Message Store within the Local Message Store. This type of rule will prevent the processing of junk email such as bounced messages and spam.

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

## **Auto-Acknowledge Rules**

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

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

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

## **Auto-Processing Rules**

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

### **Example**

#### **Create Service Request**

The auto-processing rule action Create Service Request allows administrators to

automatically create a service request from inbound email. Such a rule can include an email parser definition. Administrators can also specify what service request type and notification template to use when creating the service request.

When a service request is automatically created, the content of the email body is included in service request notes. If the auto-processing rule includes an email parser definition and thereby provides more information to the service request, the service request can then be better routed for best attention. Oracle Email Center also provides an option to send a notification when the service request is created or updated. Service requests can be created from both employee and contingent worker email.

If the auto create process fails, the email can either be routed to an agent, a service request can be created for the default customer, or the email can be redirected to a specified email address. However, the redirect option is only available for employee emails.

### **Update Service Request**

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

### **Execute Custom Procedure /Workflow**

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

## **Auto-Redirect Rules**

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

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

## **Auto-Reply Rules**

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

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

If the incoming email is responded to automatically, then the status of the incoming email is automatically changed to "Resolved." The email is not processed any further.

In cases where an auto-reply email is sent in response to an incoming email message, an auto-acknowledgement email is suppressed so the customer will not receive two separate emails.

## Document Retrieval Rules

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

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

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

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

## Routing Rules

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

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

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

## Intents

Oracle Email Center uses Oracle Text technology to extract keywords from an incoming email. The keywords are then used to identify the purpose or the "intent" of the email. The intent can then be used to categorize or classify email in unique queues. The keywords associated with an intent can also be used to automatically search through the knowledge base repositories and provide the agent with a list of documents that can serve as probable responses to the incoming email.

Oracle Email Center provides administrators with a user interface to create and manage intent. For Email Center's intent function to work, an administrator must configure "Intents" with sets of keywords that would be found in the incoming email as well the matching response documents stored in the knowledge base repositories. The administrator can rank the keywords by awarding each one a weight, which translates to its importance in comparison with other keywords for the same intent. Email Center then maps the keywords extracted by Oracle Text from the incoming email with the list keywords defined by the administrator to determine the "intent" of the email and retrieve matching response documents as well.

## Email Parser

The Oracle Email Center email parser can parse an inbound email for data elements contained within user-defined tags. The information captured from the inbound email can then be used to populate service request fields when a service request is automatically created from this inbound email using an auto-processing rule. With the Email Parser Definition page, administrators can define the tags and the data associated with them. For an email, the application maps data between the start and end tags to the corresponding service request field indicated in a specific line item. Later, using the Create Auto-Processing Rule page, they can associate the definition with an auto-processing rule.

The following table shows the service request fields. (This document adds the Subfield column to meet legal requirements.)

### ***Service Request Fields***

<b>Subfield</b>	<b>Field</b>	<b>Description</b>
Customer Attributes:	Service Request Type	Service Request Type
Customer Attributes:	Urgency	Urgency of the SR
Customer Attributes:	Account Number	Account Number



<b>Subfield</b>	<b>Field</b>	<b>Description</b>
Customer Attributes:	Customer Number	Customer Number
Customer Attributes:	Customer Name	Name of the customer
Customer Attributes:	Customer Phone	Phone number of the customer
Customer Attributes:	Customer Email	Email address of the customer
Contact Attributes:	Contact Number	Contact Number
Contact Attributes:	Contact Name	Name of the Contact
Contact Attributes:	Contact Phone	Phone number of the Contact
Contact Attributes:	Contact Email	Email address of the Contact
Contact Attributes:	Instance Number	Instance Number
Contact Attributes:	Instance Serial Number	Serial Number for the Instance
Contact Attributes:	External Reference for an Item	External Reference number for an Item
Inventory Attributes:	Inventory Item number	Number of the Inventory Item
Inventory Attributes:	Tag Number	Tag Number
Inventory Attributes:	Serial Number	Serial Number
Problem Code and Resolution Code Attributes:	Problem Code	Problem Code
Incident Address Attributes:	Addressee	Addressee information
Incident Address Attributes:	Incident Site Number	Site number pertaining to that incident
Incident Address Attributes:	Site Name	Name of the Site

Subfield	Field	Description
Incident Address Attributes:	Incident Address1	Line 1 of Incident Address
Incident Address Attributes:	Incident Address2	Line 2 of Incident Address
Incident Address Attributes:	Incident Address3	Line 3 of Incident Address
Incident Address Attributes:	Incident Address4	Line 4 of Incident Address
Incident Address Attributes:	Incident City	Incident City
Incident Address Attributes:	Incident State	Incident State
Incident Address Attributes:	Incident Country	Incident Country
Incident Address Attributes:	Incident Province	Incident Province
Incident Address Attributes:	Incident Postal Code	Incident Postal Code
Incident Address Attributes:	Incident County	Incident County

### Example

Here is an example of the broad process of email parsing.

### Setup

The administrator creates a new Email Parser definition with the line entries shown in the following table.

#### *Email Parser Definition*

Service Request Field	Start Tag	End Tag
Instance Number	Instance Number:[	]
Customer Number	Customer Number:[	]
Account Number	Account Number:[	]

### Structured Email

The structured email contains the following tagged text:

- Instance Number:[ 121223]
- Customer Number:[32222]
- AccountNumber:[ 1608 ]

### Action

The Email Parser definition is associated with a Create Service Request auto-processing rule. The Email Parser extracts the below data and maps it to the following service request fields:

- 121223 > Instance Number
- 32222 > Customer Number
- 1608 > Account Number

Subsequently, as part of the Create Service Request auto-processing rule, the data that the Inbound Parser definition has captured, such as Instance Number, Customer Number, and Account Number in the example is passed to the service request that the applications is creating from the inbound email.

In this example, the resulting service request that is created from this inbound email has the Instance number prepopulated with the 121233, the Customer Number field pre-populated with the value '32222' and the Account Number field pre-populated with the value '1608'.

In the case where there is carriage return within the data being captured, the integrity of the carriage return is maintained. As an example:

```
SR Field: Problem Description
Start Tag: Problem Description (
End Tag:)
```

```
And we get the following email:
Problem Description(Line 1
Line 2
Line 3)
```

```
The captured data will be:
Line 1 <cr>
```

## Email Tags

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

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

email header.

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

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

There are two types of tags: system and custom.

**System tags** are seeded key value pairs, maintained and processed by the Email Center server processing engine. Examples are: INTERACTION\_ID, AGENT\_ID and BIZ\_KEY\_VAL. These are internal to the product and cannot be removed or changed. Email Center maintains seeded biz\_key names for business applications that integrate with Email Center.

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

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

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

### Examples of Custom Tags

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

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

**Procedure type tag:** The ID of the Customer associated with the email message is used to look up sales volume for last month. A Procedure Tag "SALESVOL" is created with a value of "LOOKUP\_UP.SALES\_VOLUME". When an email is sent from this account the

Procedure is executed and the resulting value included in the tag. When a customer responds, the tag is extracted and based on the Tag value the email is classified. If the value is >10000 then classify as "Premier Customer", if >5000 and <10000 then "Gold Customer", otherwise "Silver Customer".

## Knowledge Bases

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

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

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

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

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

Administrators can select the MES categories and sub-categories that will be scanned for matching response documents on a per account basis. This way the documents returned by the intent analysis engine are more accurate. Email Center administrators can also select the MES category in which the templates or style sheets are stored, so that when an agent is composing a new email, the templates stored in that category are available for "quick" insert. This is explained in the "Setting Profile Options" chapter later.

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

## Resource Manager

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

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## Implementation Tasks

This chapter covers the following topics:

- Configuring the Download Processor
- Configuring the Outbox Processor
- Starting Concurrent Programs
- Defining an Administrator for Oracle Email Center Administration
- Creating a Default Customer
- Creating a Default Resource
- Setting Profile Options
- Creating Email Accounts
- Creating Oracle Email Center Agents and Administrators
- Configuration Checkpoint: Verification
- Configuring Processing Rules
- Rules Checkpoint: Verification
- Configuring Business Data
- Business Checkpoint: Verification
- Setting Up Auto-Creation and Auto-Update of Service Requests

### Configuring the Download Processor

**To Start the Download Processor From Oracle Applications Manager::**

1. Log into Oracle Applications Manager.
2. Select **Navigate to Application Services**, and click **Go**.
3. Select and click the Email Center Download Processor link.

4. Select **Email Center Download Processor - Normal Mode**, select **Start** and click **Go**.

**To Stop the Download Processor:**

1. Login to Oracle Applications manager.
2. Select **Navigate to Applications Services**, and click **Go**.
3. Select and click the Email Center Download Processor link.
4. Select **Email Center Download Processor - Normal Mode**, select **Stop** and click **Go**.

**To Edit Download Processor Parameters:**

1. Login to Oracle Applications Manager.
2. Select **Navigate to Applications Services**, and click **Go**.
3. Select and click the Email Center Download Processor link.
4. Select **Email Center Download Processor - Normal Mode**, select **Edit**.
5. Click **Edit Service Parameters**.

## Configuring the Outbox Processor

With the introduction of the Local Message Store in Release R12, IMAP calls are no longer required, since the original inbound messages, as well as the Email Center-generated outbound messages, are stored locally in the Oracle eBS database rather than an Oracle Email Server IMAP message store. In this situation the Outbox Processor benefits of faster processing time are no longer realized, so agent actioned messages are now processed in realtime.

The Outbox Processor is still necessary to handle the auto-processing actions, such as auto-acknowledgements and auto-replies, that can occur during inbound email processing.

In Release R12 the step of editing the Applications Context file is still required, however, now this can be done via the Oracle Application Manager.

Steps:

1. Stop all middle tier services.
2. Login to Oracle Application Manager.
3. Click the **Site Map** tab.
4. Under System Administration, select the AutoConfig link.



5. In the Context Files section, click the Edit Parameters image for the Applications Tier context file.
6. From the drop-down menu in the Search area at the top of the page, select **OA\_VAR**.
7. Type **s\_load\_emailcenter\_servlet** in the edit field and click **Go**.
8. Set the **Start Email Center Outbox Processor** context file parameter to **1**.
9. Click **Save**.
10. Run AutoConfig to regenerate the system files.
11. Restart the Application Server.

To verify if the outbox processor is running correctly:

1. Check the InitializationServlet present in orion-web.xml (\$INST\_TOP/ora/10.1.3/j2ee/oacore/application-deployment/oacore/html).
2. Access the following URL: `http://<hostname>:<port number>/OA_HTML/iem_op_init`. It should return a blank page.
3. Login using the Email Center Administrator responsibility.
4. Navigate to **Administration > Monitoring > Outbox Processor**.
5. Click the Status function link.
6. On the Outbox Processor page, if the outbox processor is running, you will see values in the table - complete with start times.

## Starting Concurrent Programs

The concurrent processor runs events in the database.

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

- **Rebuild Help Search Index** - This program is owned by AOL and is used for rebuilding index for MES document repository.
- **Email Center Download Processor Notifications** - This program starts Email Center DP notification workflow.
- **Process Email Center Purge Requests** - Purges email messages from the system.
- **Start Email Processing** - Start Email Processing controller which spawns separate

worker processes.

- **Email Processing Worker** - This is the child process spawned by the above controller.
- **Stop Email Processing** - Stop all email processing worker.
- **Start Email Center Migration** - This is the controller program which spawn separate migration worker process.
  - **Email Center Migration Worker** - Worker threads for migration, spawned by the controller program.
- **Stop Email Center Migration** - This program stops all migration worker processes.

Use the following steps to start the applicable concurrent programs.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

None.

### Steps

1. Click **Monitoring > Concurrent Programs**.
2. Click **Submit New Request**.
3. In the Program Name field, search for the name of the concurrent process you want to run.  
You can use wildcards (%) to help broaden your search.
4. In the Select column, click the Select radio button, then click **Select**.
5. Click **Next**.
6. Specify the parameters for the selected concurrent program, and click **Next**.  
The parameters will vary depending on the concurrent program you selected.
7. If applicable, specify the desired layout, and click **Next**.
8. Review the selected concurrent program and if all of the parameters meet with your approval. If you want to change a parameter, click **Back**, make the change. Click **Submit**.

9. Click **OK** to return to the **Monitoring > Concurrent Programs** page.

## Defining an Administrator for Oracle Email Center Administration

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

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

Number	Required?	Description	Responsibility
Step 3	Required	<p><b>Assign the JTF_FM_ADMIN role to the user account.</b></p> <p>See the Assigning the JTF_FM_ADMIN Role to a User Account topic.</p>	CRM HTML Administration
Step 4	To use MES	<p><b>Create a resource for the employee.</b></p> <p>See the Creating a Resource for an Employee topic.</p>	CRM Resource Manager

### Creating a User Account for Email Center Administration:

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

#### Login

Self-Service Login URL

#### Responsibility

System Administrator

#### Prerequisites

Review *Oracle E-Business Suite Systems Administrator's Guide*.

#### Steps

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

The User window appears.

Use the following guidelines to define Oracle Applications usernames:

- Use only one word.
- Use only alphanumeric characters ('A' through 'Z', and '0' through '9').
- Use only the set of characters that your operating system supports for filenames.

2. In the User Name field, enter the name of the user.

The password is temporary. When the user signs on to Oracle Applications for the first time, the message "Your password has expired" appears and the user is prompted to set a new password.

Use the following guidelines to define Oracle Applications passwords:

- Use at least five characters and no more than 100 characters.
  - Use only alphanumeric characters ('A' through 'Z', and '0' through '9').
3. In the Password field, enter the password for the user account and then press Tab.  
The cursor remains in the Password field.
  4. Enter the password again to verify it.
  5. If you want to use this account to submit concurrent programs for Oracle Email Center, then select an employee to associate with this user account from the Person field.
  6. In the Responsibilities tab, add the following responsibilities:

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

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

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

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

You may close the Users window.

### **Assigning the JTF\_FM\_ADMIN Role to a User Account:**

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

#### **Login**

HTML Login URL

#### **Responsibility**

CRM HTML Administration

#### **Prerequisites**

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

#### **Steps**

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

## Creating a Default Customer

All interactions must be associated with a valid customer. Oracle Email Center will try to identify a customer record automatically by matching the email address of the incoming email to the ones stored in the customer schema. However if the email address match fails, then the agent is provided with the ability to search and select a valid customer record and associate the same with the email while responding to it. If the agent cannot find the matching customer and does not wish to create a new one, then the current interaction will be recorded against the "default customer" you select. You must create a customer record for this purpose and select it while setting Email Center site level profile options. Since Email Center does not provide the ability to create new customer records, you must create a customer using any other business application. All Oracle Applications including Oracle Email Center use the same Trading Community Architecture (TCA) customer model and hence a customer record created via any business application can be viewed and selected in Oracle Email Center as well. For information on creating a customer, refer to the documentation for the applicable Oracle business application. For information pertaining to setting the Email Center site level profile option, refer to the Setting Profile Options, page 4-9 section below.

## Creating a Default Resource

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

For more information on creating resources, see the Creating a Resource for an Employee, page 4-30 topic.

## Setting Profile Options

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

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

- Setting Email Center Site Profiles, page 4-9

- Setting Email Center System Profiles Set in Forms, page 4-12
- Setting UWQ Work Profiles, page 4-18

### Setting Email Center Site Profiles:

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

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

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

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Steps

1. Click the **Profile** hyperlink.
2. From the side panel, click the **Email Center** hyperlink.  
The Email Center Site Profile Options page appears.
3. Set the following profile options:
  - **Default Spell Checking Dictionary** - This profile option specifies the language used when spell checking your email messages. From the list, select the dictionary for the appropriate language you want to use for spell checking.
  - **Spell Check Messages Before Sending** - This profile option lets you determine whether Oracle Email Center will automatically start the spell checking process prior to sending your message. Select **Yes**, to have the spell checker automatically begin. If you select **No**, you can still manually check the spelling in your email messages.
  - **Default Customer Number** - As explained above, a valid customer record is required for recording interactions. Email interactions for which either a customer could not be identified automatically or selected manually by an agent will be recorded against this "Default Customer". To select a previously created customer record as the default, perform the following steps:
    1. Click the flashlight icon.



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

2. Select the search criteria by checking the corresponding radio button(s).
3. Enter the search criteria.
4. Click **Search**.

The customer records that match the search criteria are displayed.

5. Check the radio button of the appropriate customer record.
6. Click **Apply**.

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

- **Cache Update Frequency** - This profile option determines the frequency with which the Email Center Agent Console cache is refreshed. You can enter any number between 5 and 60, the unit of measurement being minutes.
- **Default Resource Number** - All interactions must also be associated with a valid resource. Since Email Center includes automated processing actions that do not involve an agent (resource), we need a resource number to record interactions for the same. Use the Resource Manager application (as explained in the "Creating Resources" section) to create or search for a resource that will be used by default. Make a note of the resource number and enter it in the "Default Resource Number" profile option.
- **Default Service Request Status Template** - When you select a template in this profile option, upon creating a Service Request, the title of the template is displayed as a hyperlink in the Service Request container with "Insert" and "Attach" options underneath it. This enables agents to insert a predefined SR status template with a single click rather than having to browse through the Knowledge Base repository for templates. In the Default SR Status Template field, search for and select the template you want to use as your default service request template.
- **Reply to All** - This profile option provides the ability to reply to all recipients copied on the incoming email. If an incoming email contains multiple email addresses in the "To" and "Cc" fields, then each of those addresses are automatically applied (copied) to the outbound response as well. From the list, select **Yes** or **No**.
- **Include Incoming Attachments when Replying** - If you set this profile option to **Yes**, then the original attachments will automatically be attached to the reply being composed and the titles of the attachments will be displayed in the

"Attachments" section. From the list, select **Yes** or **No**.

- **Number of Intents With Pre-fetched Responses** - This profile option sets the number of intents against which Email Center will match keywords to produce response documents. If an incoming email maps to more intents than specified by this profile option, the agent can view the additional response documents by clicking More, then clicking the appropriate intent names.
- **Expand Emails on Thread Page** - This field determines whether emails appear in expanded or collapsed format on the Thread page. By default, this value is Yes.

4. Click **Update**.

### Setting Email Center System Profiles:

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

Profiles are grouped into categories based on their function.

The following table lists all of the Email Center system profiles and a brief description of each.

Category	Profile Name	Description
Email Administration	IEM: Admin: Default Customer Party ID	Internal usage. Stores the party_id of the default customer.
Email Administration	IEM: Admin: Default Customer Party Number	Defines Customer number (party_number) for the default customer. Controlled from the Email Center Administration console Profiles page.

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Email Administration	IEM: Admin: Include Attachments when Replying	If you set this profile option to <b>Yes</b> , then the original attachments will automatically be attached to the reply being composed and the titles of the attachments will be displayed in the "Attachments" section. Controlled from the Email Center Administration console Profiles page.
Email Administration	IEM: Admin: Default Resource Number	Defines the default resource number to be used when logging interactions for auto-processing. Controlled from the Email Center Administration console Profiles page.
Email Administration	IEM: Admin: Mid-tier Cache Update Frequency	Defines the frequency, in minutes, at which the mid-tier client cache is updated. Valid values are 5-60 minutes. Controlled from the Email Center Administration console Profiles page.
Email Administration	IEM: Expand Emails on Thread Page	Determines whether emails appear in expanded or collapsed format on the Thread page. By default, this value is Yes.

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Email Administration	IEM: Admin: Reply To All	This profile option provides the ability to reply to all recipients copied on the incoming email. If an incoming email contains multiple email addresses in the "To" and "Cc" fields, then each of those addresses are automatically applied (copied) to the outbound response as well. Controlled from the Email Center Administration console Profiles page.
Email Administration	IEM: Application Base Version	Email Center version related information.
Email Processing	IEM: Processing: Rerun Auto-Processing Custom Procedure	Defines whether a custom procedure needs to be re-run when an email is being re-processed due to a re-route or re-direct. Default value is "Yes". Valid values are "Yes" and "No".
Email Processing	IEM: Processing: Number of Intents with Response Documents Pre-fetched	This profile option sets the number of intents for which Email Center will automatically retrieve matching documents at the time of email processing. If an incoming email maps to more intents than specified by this profile option, the matching documents for those additional intents will be retrieved in real time when explicitly requested by the agent.
Email Processing	IEM: PROCESSING: REPROCESS ALL TAGS	This profile allows Email Center to reprocess the same tag multiple times. By default the value is set to "yes".

Email Processing	IEM: Processing: Rerun Auto-Processing Custom Procedure	Defines whether a custom procedure needs to be rerun when an email is being reprocessed due to a reroute or redirect. Defaulted to "Yes" and valid values are "Yes" and "No".
Email Processing	IEM: Processing: Rerun Custom Workflow	This system profile defines whether a custom workflow needs to be rerun when an email is being re-processed due to a re-route or re-direct. Default value is "Yes". Valid values are "Yes" or "No".
Email Processing	IEM: Processing: Resource Id Used For Auto-Processing	Internal usage. Defines the resource ID to be used for logging interactions. This stores the resource ID for the resource number in IEM_DEFAULT_RESOURCE_NUMBER profile.
Integration	IEM: Integration: Auto Create Service Request Note Type	Provides a list of the valid service request notes types for that implementation.
Integration	IEM: Integration: Customer Match Not Found	Provides an option to indicate what should happen if no customer matches are found.
Integration	IEM: Integration: Default Template for Manual Service Request Response	This profile option is the identifier for the standard Service Request template available for insert or attachment.
Integration	IEM: Integration: Email Notification upon Auto Create Service Request	This profile option provides a flag to indicate if Email Center will send an automatic notification after a service request has been created.

Integration	IEM: Integration: Employee Service Request cannot be created or updated	This provides an option to indicate what should happen to the email message if a service request cannot be created or updated.
Integration	IEM: Integration: Knowledge Base	Defines the default knowledge base where Email Center should be searching for suggested response documents. Controlled from the Email Center Administration console Profiles page.
Integration	IEM: Integration: Redirect Email Address	Indicates the email address to which the email messages will be redirected.
Integration	IEM: Integration: Service Request Summary Prefix	Provides the service request summary text to be added in front of the email subject.
Integration	IEM: Integration: TeleService Enabled	Defines whether the Email Center/Teleservice integration features are used. Valid values are "YES" or "No".
Message Component	IEM: Message Component: Enable reason entry from the Reply/Compose Page	Shows or hides the Reason list on the Reply and Compose pages.
Message Component	IEM: Message Component: Hide History Forward	When set to "Y", the Forward button is hidden from the historical message preview.
Message Component	IEM: Message Component: Hide History Reply	When set to "Y", the Reply button is hidden from the historical message preview.
Message Component	IEM: Message Component: Hide History Resend	When set to "Y", the Resend button is hidden from the historical message preview.

Message Component	IEM: Message Component: Hide the delete button from agents	Set to "Yes" to hide the Delete button from agents.
Migration	IEM: Admin: Category Id for Templates	Defines the MES category ID where Email Center templates are stored. Controlled from the Email Center Administration console Profiles page.
Migration	IEM: Admin: Sender Name on Outbound Emails	Defines sender name to be used in outbound emails. Valid values are "AGENT" or "ACCOUNT". Controlled from the Email Center Administration console Profiles page.
Outbox Processing	IEM: Outbox Processing: Number of threads processing error queues	Sets the maximum number of threads the Outbox processing allows at one time in the error queues.
Outbox Processing	IEM: Outbox Processing: Number of threads processing the Outbox	Sets the maximum number of threads that can be processes at one time in the Outbox Processor.
Outbox Processing	IEM: Outbox Processing: Seconds to sleep between processing	Sets the number of seconds to sleep after processing all messages.
Outbox Processing	IEM: Outbox Processing: Times to retry a failed Outbox item	Sets the maximum number of times a failed outbox processing item is retried before processing is canceled.
Spell Checker	IEM: Spell Checker: Default Spell Check Language	Determines the default language the spell checker uses.
Spell Checker	IEM: Spell Checker: Dictionary Files Directory	Determines the location of the spell checker dictionary files.

Spell Checker	IEM: Spell Checker: Spell check messages before sending	Determines whether Oracle Email Center will automatically start the spell checking process prior to sending your message.
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Use the following steps to set these profile options.

### Login

Forms login URL

### Responsibility

System Administrator

### Prerequisites

None

### Steps

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

### Setting UWQ Work Profiles:

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

### Enable Launching of Email Center Message Component from UWQ

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

### Login

Forms Login URL



**Responsibility**

System Administrator

**Prerequisites**

None

**Steps**

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

**Enable Display of Email Media Counts in UWQ**

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

**Login**

Forms Login URL

**Responsibility**

System Administrator

**Prerequisites**

None

**Steps**

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

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

## Creating Email Accounts

To receive email messages in your Email Center, you must create email accounts on your IMAP compliant email server. After creation on the email server, these email accounts must be defined using the accounts functionality of the Email Center Administration console.

## Email Account Settings

Field Name	Description
Email Address	This is the combination of the email account name - a unique name that identifies the account in the system, and the domain name for the email account.
Display Name	Default name representing the sender of emails from this account. See the Email Center Site Profiles section for more details on how this name is used.
Description	Allows you to type a description for the account. This description will appear in the Email Account Details section of the Summary page.
Reply To	A valid email account name (e.g. support@oracle.com) to which you wish to have "reply" email messages sent in response to an outgoing email sent from this account. If you leave this field blank, the address specified in the Email Address field will be used.
Return Path	Allows you to specify an alternate return path for email replies. If you leave this field blank, the same return path will be used as for the address specified in the Email Address field.

Field Name	Description
Status	<p>Allows you to set the status of the email account to "Active" or "Inactive". When the status is set to "Active", Email Center validates that the email account exists on the mail server and the following folders exist for that email account:</p> <ul style="list-style-type: none"> <li>• Oracle Processed</li> <li>• Oracle Retry</li> </ul> <p>Email Center will automatically create the above folders if they do not exist.</p> <p>Please note that these folder names are case sensitive.</p>
Account Name	<p>This is the account name that is displayed in the Email Center Agent Console and Message Component. This account name must already exist on the IMAP compliant email server before setting the account to "Active" in Email Center.</p>
Password	<p>Password to access the email account.</p>
Re-enter Password	<p>Confirmation of the password to access the email account.</p>
IMAP Host	<p>Host name for the incoming email server.</p>
IMAP Port	<p>Port number for the incoming email server. Default value is 143.</p>
SMTP Host	<p>Host name for the outgoing email server.</p>
SMTP Port	<p>Port number for the outgoing email server. Default value is 25.</p>

Field Name	Description
Language	Language of the incoming emails being sent to this account. This is used to tie the email account being defined to a specific language for intent processing. Email Center supports intent processing in multiple languages and this ability is accomplished using the assumption that an email account receives email of the same language.
Account Type	Allows you to set the account type to "External" or "Internal". External accounts are defined to receive emails from external parties such as customers, partners, resellers, and so on. Internal accounts are set up to receive emails from internal employees.
Allow Queue Access	Allows you to indicate whether or not the account is enabled for queue access. If this field is marked Yes, then all the underlying classification queues under this email account are access enabled.
Intent Analysis	Allows you to determine the method by which Email Center extracts keywords for intents. "Themes" can only be used with the English language.
Spell Checking Dictionary	Allows you to use the default site dictionary for spell checking, or specify a particular dictionary language to use.
Customized Processing Flow	Email Center ships with default workflow called the 'Mail Pre-processing' workflow. If you are planning to implement any customizations to the out-of-the-box Email Center application, you can force the email processing to invoke your customizations by enabling this field.
Default Email Template Category	Allows you to specify a default category for email templates. If you do not select a category, templates will not appear on the Compose or Reply pages of the Email Center Message Component.

Field Name	Description
Sender Name for Outbound Email	Allows you to specify whether you want the agent's name or the name you typed in the Display Name field to appear as the sender name on outbound email.

Use this procedure to create email accounts.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

The email account must already exist on the HTML compliant email server before setting its status to Active in Email Center.

You should know your IMAP and SMTP host names and port numbers.

### Steps

1. Click the **Administration** tab.
2. In the side panel, click **Summary**.  
The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.
3. Click **Create**.
4. Provide all of the mandatory information and any optional information you want to include.

**Tip:** If you have not implemented any customizations in the Mail Preprocessing workflow, you should select the "Disabled" value for the Customized Processing Flow field. Setting the value to "Disabled" reduces Email Center processing time that would otherwise be used to call and execute the Mail Preprocessing workflow.

5. Click **Apply**.

## Creating Oracle Email Center Agents and Administrators

If you have defined an administrator for Oracle Email Center, then that user has all of the responsibilities necessary to create an Oracle Email Center agent. See *Defining a Administrator for Oracle Email Center Administration*, page 4-5 for more information.

Oracle Email Center ships with the following responsibilities

- Email Center Administrator responsibility - enables the user to configure Email Center via the Administration console.
- Email Center Agent Console responsibility - enables the user to view the email queues and their account inboxes via the Email Center Agent Console.
- Email Center Message Component responsibility - enables the user to preview emails, respond to incoming emails and compose new emails.
- Email Center Supervisor responsibility - allows access to the Supervisor tab on the Agent console. This tab provides Email Center supervisors with a set of tools to better manage Email Center activities.

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

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

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

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

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

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

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

### Creating an Employee:

You can create employees in two ways:

- Creating an Employee in Oracle Human Resource Management Systems, page 4-26
- Creating an Employee in Resource Manager, page 4-27

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

## Creating an Employee in Oracle Human Resource Management Systems

**Note:** If you do *not* have Oracle Human Resource Management Systems installed, then see Creating an Employee in Resource Manager, page 4-27.

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

### Login

Self-Service Login URL

### Responsibility

HRMS Manager (for example, US HRMS Manager)

### Prerequisites

None

### Steps

1. In the Navigator window, on the Functions tab, choose **People >Enter and Maintain**.

The Find Person window appears.

2. Click **New**.

The People window appears.

3. Enter the information for the new person.

The following fields are required:

- Last (Name)
- Gender
- Type

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

- Employee (Number)

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



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

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

You may close the People window.

## Creating an Employee in Resource Manager

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

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

### Login

Self-Service Login URL

### Responsibility

CRM Resource Manager

### Prerequisites

- Review *Oracle Foundation Concepts and Procedures*.

### Steps

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

The Find Person window appears.

2. Click **New**.

The People window appears.

3. Enter the information for the new person.

The following fields are required:

- Last (Name)
- Gender
- Type

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

- Employee (Number)

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

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

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

You may close the People window.

### **Creating an Oracle Applications User Account for an Employee:**

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

#### **Login**

Self-Service Login URL

#### **Responsibility**

System Administrator

#### **Prerequisites**

None

#### **Steps**

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

The Users window appears.

Use the following guidelines to define Oracle Applications usernames:

- Use only alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
- Use only the set of characters that your operating system supports for filenames.

2. In the User Name field, enter the name of the user.

The password is temporary. When the user signs on to Oracle Applications for the first time, the message "Your password has expired" appears and the user is prompted to set a new password.

Use the following guidelines to define Oracle Applications passwords:

- Use at least five characters and no more than 100 characters.
  - Use only alphanumeric characters ('A' through 'Z', and '0' through '9'), underscore, space, or hyphen.
3. In the Password field, enter the password for the user account and then press Tab. The cursor remains in the Password field.
  4. Enter the password again and then press Tab to verify the password.
  5. In the Person field, select an employee to associate with this user account.
  6. In the Responsibilities tab, search for and add the appropriate responsibilities for this user.

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

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

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

### **Assigning the JTF\_FM\_ADMIN Role:**

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

#### **Login**

HTML Login URL

#### **Responsibility**

CRM HTML Administration

#### **Prerequisites**

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

assign the role to another user.

### Steps

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

### Creating a Resource for an Employee:

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

#### Login

Self-Service Login URL

#### Responsibility

CRM Resource Manager

#### Prerequisites

- Review *Oracle CRM Foundation Concepts and Procedures*.

### Steps

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

2. In the Resource Category field, select **Employee**.
3. Enter any additional selection criteria.  
For example, in the Name field, select the name of an employee.
4. Click **Search**.  
Employees that meet the search criteria are listed in the Search Results area. The Select checkboxes for the matching employees are automatically selected.
5. Clear the Select checkboxes of the employees for whom you do not want to create a resource.
6. Click **Create Resource**.  
The Default Values window appears. You can add or modify this information in the resource details later.
7. Click **OK** to accept the defaults.  
The Selected Resources window appears. The Comments field indicates whether the resource is a new record, a duplicate record, or a duplicate record with a new role definition. The Select checkboxes are automatically selected.
8. Clear the Select checkboxes of the employees that you do not want to save as a resource.
9. To save the resources, click **Save Resource**.  
A transaction number appears in the Transaction Number field. The transaction number is associated with each resource created during this transaction. More than one resource can have the same transaction number.
10. To view the details about a resource, select the resource and then click **Details**.  
The Resource window appears. Verify the name of the resource (Name), the name of the employee (Source Name), and the user name (User Name) and note the resource number (Number).
11. In the Roles tab, assign one or more roles to the resource.
  1. In the Role Type field, select a role type.
  2. In the Role field, select a role.
  3. For users with the Email Center Agent Console Responsibility assigned: Select **iCenter** from the drop down list for Role Type and select **Email Center Agent** from the drop down list for Roles.
  4. For users with the Email Center Administrator Responsibility assigned: Select

**Marketing Encyclopedia** from the drop down list for Role Type and select **MES Administrator** from the drop down list for Roles.

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

You may close the Resource and Research Search Results windows.

### **Creating Resource Groups:**

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

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

Ensure email accounts and Email Center agents have been created.

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

#### **Steps**

1. Click the **Resource Groups** tab.  
The Groups page appears.
2. In the Groups page, click **Create**.  
The Create Group page appears.
3. In the Name field, type a name for the resource group you are creating.
4. In the Active From, use the calendar tool to select a start date for your resource group.
5. From the list in the Application Areas field under the Used In area, select **Call Center** as the group usage.  
You can assign multiple usages to the group, but the **Call Center** usage **MUST** be assigned.
6. In the Members area, click **Add Members**.
7. Search for and select the name of the agent you want to assign to the resource group.

8. In the Role Name field, type one of the following roles:
  - **Email Center Manager**
  - **Email Center Supervisor**
  - **Email Center Agent**
9. Repeat steps 6 - 8 for each agent you want to assign to the resource group.
10. Click **Apply**

The resource group is created and the selected agents are assigned to it.

### **Performing the Agent — Email Account Assignment:**

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

Assigning Email Accounts to Agents, page 4-33

Assigning Agents to Email Accounts, page 4-34

### **Assigning Email Accounts to Agents**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The email account you will be assigning to an agent must already be created on the email server and defined in Email Center. The agent must already exist.

#### **Steps**

1. Click the **Administration** tab.
2. In the side panel, click **Agents**.

The Agents and Accounts Assignment page appears.
3. From the list in the Assign field, select **Accounts to Agents** and click **Go**.
4. Enter the search criteria to search for the agent(s) you want to assign to an email account.
  1. If you want to search for an agent using the agent's user name, in the Agent

User Name field, type the name of the agent.

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

The agent search results appears listing the agents which were found to match the given search criteria.
6. In the Select column, select the box next to the agent user name of the user you want to assign to email accounts.
7. Click **Assign Email Account**.

The Assign Email Accounts to Agents page appears with the list of available email accounts displayed in the Account Name column. The Assigned Email Account list displays the list of email accounts that were previously assigned to the agent.
8. To assign selected email accounts to an agent, select their corresponding Account Access box for account access and Queue Access box for queue access.
9. To save your work and assign the email accounts to the agent, click **Apply**.

### **Assigning Agents to Email Accounts**

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

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The email account to which you will be assigning an agent must already be created on the email server and defined in Email Center. The agent must already exist.



## Steps

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

The Assign Agents to Email Accounts page refreshes with the list of available agents displayed in the Agent Name column and their current access to the selected account indicated by checks in corresponding Account Access and Queue Access fields. Email accounts that are not enabled for queue access have their Queue Access column disabled.

5. To adjust an agent's access to the email account and access to it, select or clear that agent's corresponding check boxes.

**Note:** If you select Queue Access for an agent, then Account Access is automatically selected for that agent.

6. Click Apply to save your work and assign agents to their email accounts.

When agents who have been assigned access to an account that has been marked as rcherry pick enabled log in into the application and go to the Agent home page, they will notice a new tab called Queue on the top tab list.

## Configuring Group Member Roles and Usage for an Agent:

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

### Login

HTML Login URL

### Responsibility

CRM Resource Manager

### Prerequisites

- Create an employee.
- Create an Oracle Applications user account for the employee.
- Create a resource for the employee.

- Review *Oracle CRM Foundation Implementation Guide*.
- Review *Oracle TeleSales Implementation Guide*.

### Steps

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

The Define Groups window appears.

2. Find a group or create a group by entering a group name.
3. In the Members tab, add a resource to the group.
  1. In the Category field, enter **Employee**.
  2. In the Number field, enter the resource number or, in the Name field, enter the name of the resource.
  3. Click **Member Roles**.  
The Member Roles window appears.
  4. In the Role Type field, select a role type.

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

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

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

To use this application or feature...	Select this usage...
Oracle TeleSales	Sales and TeleSales
Oracle TeleService	No usage requirement.

To use this application or feature...	Select this usage...
Oracle Advanced Inbound, Oracle Advanced Outbound, Email Center	Call Center

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

You may close the Define Groups window.

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

## Configuration Checkpoint: Verification

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

- Ensure intent processing is disabled. By default, intent processing is disabled for all accounts. However, at this point, we recommend you test your configuration with the intent processing disabled. If you require intent processing as part of your implementation, a later step will allow you to enable the Intent Processing. To verify intent processing is disabled, perform the following:
  - Login to the HTML Login URL and select the Email Center Administrator responsibility.
  - Click the **Administration** tab.
  - Click the **Email Accounts** subtab.
  - In the Select column, click the radio button to select an email account.
  - Click the **Update** icon corresponding to the selected email account.
  - In the Intent Analysis list, ensure **Disabled** is selected
  - Click **Apply**.
  - Repeat these steps for every email account.
- Submit the concurrent program request to run Start Email Processing.

Submitting request to run Start Email Processing:

1. Click the **Monitoring** tab.
2. Click **Submit New Request**.
3. From the list in the Program Name field, search for and select **Start Email Processing**.
4. Click **Next**.
5. Enter the parameters you want to use for the concurrent program.

For example:

**Example**

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

**Example**

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

**Example**

Sleep Time Before Resubmitting Workers (Minutes) 5

**Example**

Number of Email Processing Workers 2

**Example**

Number of Emails Processed by Each Worker 100

6. Click **Next**.
  7. Click **Submit**.
1. Send a sample email to one or more of the email accounts.
  2. Log in to the HTML Login URL and select the Email Center Agent Console responsibility.
  3. Get Message and Respond to Email.
  4. Confirm the following:
    - No errors in Concurrent process log files for Email Center.
    - Successful access to Email Center Agent Console.
    - Email counts visible in Home Page
    - Able to Get Messages and respond to an email
    - Customer search successful

- Receipt of sent email

## Configuring Processing Rules

This section covers the steps required to do the following:

- Creating Classifications and Associating Them with Accounts, page 4-39
- Creating Auto-Delete Rules and Associating Them with Accounts, page 4-43
- Creating Auto-Acknowledge Rules and Associating Them with Accounts, page 4-45
- Creating Email Parser Definitions, page 4-50
- Creating Auto-Processing Rules and Associating Them with Accounts, page 4-49
- Creating Auto-Redirect Rules and Associating Them with Accounts, page 4-54
- Creating Auto-Reply Rules and Associating Them with Accounts, page 4-57
- Creating Document Retrieval Rules and Associating Them with Accounts, page 4-60
- Creating Routing Rules and Associating Them with Accounts, page 4-63

### **Creating Classifications and Associating Them with Accounts:**

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

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

The process of creating classifications involves two tasks:

Creating Classifications, page 4-40

## Creating Classifications

Use the steps below to create a classification.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

none

### Steps

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.  
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.  
The Create Classification page appears.
4. In the Classification Name field, type a name for the classification you are creating.
5. Optionally, in the Description field, type a short description for the classification.
6. From the list in the Classification Type field, select **Static** or **Dynamic** and click **Go**.  
**Static** classifications classify based on specific criteria you designate using conditions (key/operator/value).  
**Dynamic** classifications classify based on criteria Email Center does not know out of the box. For example: if you wanted to classify incoming emails as "Gold" based on revenue statistics which exist in some customized table or external system, you can write a procedure that determines the value parameter by which the email would be classified as "Gold" or not.
7. If you selected **Static**, the Create Classification page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
  1. From the list in the Key field, select a key for the classification rule you are creating.

2. From the list in the Operator field, select an operator for the classification rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the classification rule you are creating.
8. If you selected **Dynamic**, the Create Classification page refreshes to display a procedure area where you can define the procedure name and variables you want to use.

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

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

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

### **Associating Classifications with Accounts**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign classification rules, must already exist on the email server and be defined in Email Center.

#### **Steps**

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

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the classification rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
5. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.

The Account Association page appears.
6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Classification Name column, select the classification rule you want to associate to the email account.
8. Ensure the **Enabled** checkbox is selected.
9. Click **Apply**.

The selected classification rule is added to the summary view table and it's name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the classification by clicking the hyperlinked name in the Classification Name column.

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second classification rule is associated to the email account.
10. If you are associating additional classification rules to an email account, use the Priority list on the Assign Email Processing Rules page to determine a hierarchy among the classification rules.

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



## Creating Auto-Delete Rules and Associating Them With Accounts:

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

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

Creating Auto-Delete Rules, page 4-43

Associating Auto-Delete Rules with Email Accounts, page 4-44

### Creating Auto-Delete Rules

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

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.  
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Delete.  
The Create Auto-Delete Rule page appears.
4. In the Name field, type a name for the auto-delete rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-delete rule.
6. From the list in the Key field, select a key for the auto-delete rule you are creating.
7. From the list in the Operator field, select an operator for the auto-delete rule you are creating.
8. From the list in the Value field, search for and select, or type a value for the auto-delete rule you are creating.

9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

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

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

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

### **Associating Auto-Delete Rules with Email Accounts**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign auto-delete rules, must already exist on the email server and be defined in Email Center.

#### **Steps**

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

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the auto-delete rule(s) and click **Go**.

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

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

The Account Association page appears.

6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the auto-delete rule you want to associate with the selected email account.
8. Ensure the **Enabled** box is checked for each auto-delete rule you want to use.
9. Click **Apply**.

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

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

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

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

### **Creating Auto-Acknowledge Rules and Associating Them With Accounts:**

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

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

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

If you want to be more specific as to which incoming emails receive an auto-acknowledgement, you can use the provided key/operator/value combinations to

set specific conditions for when an auto-acknowledgement will be sent out. Additionally this also enables you to select a different acknowledgement template for email accounts and different classifications within the same email account.

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

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

Once you have created auto-acknowledgement documents in MES to use (for more information on creating MES documents, refer to the Creating Documents, page 4-76 topic), the process of creating auto-acknowledge rules involves two tasks:

Creating Auto-Acknowledge Rules, page 4-46

Associating Auto-Acknowledge Rules with Email Accounts, page 4-47

### **Creating Auto-Acknowledge Rules**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

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

#### **Steps**

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

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

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

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

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

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

### **Associating Auto-Acknowledge Rules with Accounts**

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

#### **Login**

HTML Login URL

#### **Responsibility**

### Prerequisites

The accounts to which you will assign auto-acknowledge rules, must already exist on the email server and be defined in Email Center.

### Steps

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

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the auto-acknowledge rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
5. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Acknowledge.

The Account Association page appears.
6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the auto-acknowledge rule you want to associate to the selected email account.
8. Ensure the Enabled box is checked for each auto-acknowledge rule you want to use.
9. Click **Apply**.

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

A drop-down list also appears in the Priority column. A priority of 1 (highest) is the only available selection until a second auto-acknowledge rule is associated to the email account.
10. If you are associating additional auto-acknowledge rules to an email account, use the Priority list to determine a hierarchy among the auto-acknowledge rules.

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

### **Creating Auto-Processing Rules and Associating Them with Accounts:**

Auto-processing rules define the processing actions that are automatically performed on incoming emails. Such actions include creating service requests, updating service requests, and executing a custom procedure.

**Note:** When creating auto-processing rules, you have these choices:

- **Create Service Request**
  - Without an email parser definition - A seeded auto-processing action that automatically creates a service request from the inbound email. The body of the inbound email message is appended to the service request. You must also select a service request type and notification template when using this action.
  - With an email parser definition - An auto-processing action that automatically creates a service request from a *structured* inbound email. Using a parser definition, the body of the inbound email message is appended to the service request, and the application maps the structured elements of the email to corresponding fields in the service request. You must also select a service request type and notification template when using this action.

The profile option **IEM: Integration: Auto Create Service Request Note Type** populates the list of service request note types. This profile option is set in forms and must be set to "Yes" to populate the list.

The profile option **IEM: Integration: Email Notification upon Auto Create Service Request** - provides a flag that indicate if Email Center will send an automatic notification after a service request has been created.

- **Update Service Request** - A seeded auto-processing action that will be performed if the service request number tag is found in the email. When defining a rule of this type, you must also select a valid status code.
- **Execute Custom Procedure/Workflow** - Ability to call any custom

PL/SQL procedure that will be executed as part of email processing. All header and tag values extracted from the email are available as input parameters. The custom procedure however can only return "Y" (to further continue email processing) or "N" (to discontinue email processing) as the output parameter.

The process of creating auto-processing rules involves three tasks:

Creating Email Parser Definitions, page 4-50

Creating Auto-Processing Rules, page 4-51

Associating Auto-Processing Rules with Email Accounts, page 4-53

### **Creating Email Parser Definitions**

Use the following steps to create an email parser definition.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Parser** subtab.

The Email Parser Definition page appears, displaying all the email parser definitions that have been created within the system.
3. Click **Create**.

The Email Parser Definition page refreshes itself so that you can create a new definition.
4. In the Email Parser Name field, type the name of the definition.
5. Optionally, in the Description field, type the details of the inbound parser definition.
6. In the Service Request field, use the associated list to select and enter a service request field name.
7. In the Start Tag and End Tag fields, enter the start and end tags that map an email



field to the associated value of Service Request Field.

8. In the Rank field, type a number to indicate the relative importance of this field compared to the other fields defined in the parser definition. The lowest number indicates the highest priority.
9. Click **Save**.

### **Creating Auto-Processing Rules**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.  
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Processing.  
The Create Auto-Processing Rule page appears.
4. In the Name field, type a name for the auto-processing rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-processing rule.
6. If you want the auto-processing rule to apply to all incoming emails, click the All Emails box.

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

7. If you want your auto-processing rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-processing

rule should be applied to an incoming email.

1. From the list in the Key field, select a key for the auto-processing rule you are creating.
  2. From the list in the Operator field, select an operator for the auto-processing rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the auto-processing rule you are creating.
8. Optionally, repeat steps 7 for each condition you want to add to the rule.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.
- Note:** If **And** is selected, every condition defined must be evaluated as true in order for the rule to be used. If **Or** is selected, the rule will be applied if any of the conditions contained in it are evaluated as true. Conditions are evaluated in the order that they are listed.
10. From the list in the Action field, select the action you would like your auto-processing rule to perform.
11. Select parameter values that depend on the action that you selected in step 10:
1. If you selected Update Service Request as the action, then select a status code from the drop-down list available.
  2. If you selected Create Service Request as the action, then do the following:
    1. From the Email Parser list, optionally select a parser definition.

If you do not select a parser definition, then the application creates a service request based on simpler rules that pass only customer information to it.
    2. From the Service Request Type list, select a type.
    3. From the Notification Template field, search for and select a template.
  3. If you selected Execute Custom Procedure/Workflow as the action, then enter the name of a valid predefined PL/SQL procedure.
12. If applicable, in the Notification Template field, search for and select a notification template.

13. Click **Create**.

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

### **Associating Auto-Processing Rules with Accounts**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign auto-processing rules, must already exist on the email server and be defined in Email Center.

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Email Accounts** subtab.

3. From the side panel, click **Processing Rules**.

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

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

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

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

The Account Association page appears.

6. Ensure that the correct email account is displayed in the Email Account field.

7. From the list in the Rule Name column, select the auto-processing rule you want to associate to the selected email account.

8. Ensure the Enabled box is checked for each auto-processing rule you want to use.

9. Click **Apply**.

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

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

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

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

### **Creating Auto-Redirect Rules and Associating Them with Accounts:**

Auto-redirect rules enable you to redirect the incoming email to another Oracle Email Center account or an external email address.

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

Creating Auto-Redirect Rules, page 4-54

Associating Auto-Redirect Rules with Email Accounts, page 4-56

### **Creating Auto-Redirect Rules**

Use the following steps to create auto-redirect rules.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.

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

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

Auto-Redirect.

The Create Auto-Redirect Rule page appears.

4. In the Name field, type a name for the auto-redirect rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-redirect rule.
6. From the Action list, select whether you want to redirect emails to an internal or external email account, and click **Go**.
7. If you want the auto-redirect rule to apply to all incoming emails, click the All Emails box.

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

8. If you want your auto-redirect rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-redirect rule should be applied to an incoming email.
  1. From the list in the Key field, select a key for the auto-redirect rule you are creating.
  2. From the list in the Operator field, select an operator for the auto-redirect rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the auto-redirect rule you are creating.
9. Optionally, repeat the previous step for each condition you want to add to the rule.

Be sure to select how you want the conditions joined together from the Rule Chaining list.
10. For redirects to external accounts:
  1. In the Email Address field, type the address to which you want to redirect incoming email.
  2. From the Category list, select the template category containing the template to be used as the message body for the redirected email message.
  3. From the Template list, select the template you want to use as the message body for the redirected email message.

11. For redirects to internal accounts, from the Email Address list, select the account to which you want to redirect the message.

12. Click **Create**.

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

### **Associating Auto-Redirect Rules with Accounts**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign auto-redirect rules, must already exist on the email server and be defined in Email Center.

#### **Steps**

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

8. Ensure the Enabled box is checked for each auto-redirect rule you want to use.

9. Click **Apply**.

The selected auto-redirect rule is added to the summary view table and its name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the auto-redirect rule by clicking the hyperlinked name in the Email Processing Rules by Type column.

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

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

**Note:** Rules cannot share the same priority level.

### **Creating Auto-Reply Rules and Associating Them with Accounts:**

Auto-reply rules allow you to determine whether you want to automatically reply to an incoming email using the specified set of documents and templates.

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

Creating Auto-Reply Rules, page 4-57

Associating Auto-Reply Rules with Email Accounts, page 4-59

#### **Creating Auto-Reply Rules**

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

##### **Login**

HTML Login URL

##### **Responsibility**

Email Center Administrator

##### **Prerequisites**

none

##### **Steps**

1. Click the **Administration** tab.

2. Click the **Rules Library** subtab.

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

3. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Reply.  
The Create Auto-Reply Rule page appears.
4. In the Name field, type a name for the auto-reply rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-reply rule.
6. If you want the auto-reply rule to apply to all incoming emails, click the All Emails box.

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

7. If you want your auto-reply rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-reply rule should be applied to an incoming email.
  1. From the list in the Key field, select a key for the auto-reply rule you are creating.
  2. From the list in the Operator field, select an operator for the auto-reply rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the auto-reply rule you are creating.
8. In the Action area, use the Category, Document, and Insert/Attach fields to specify the category and document you want to include, as well as how the document should be included with the reply.
  1. From the list in the Category field, select the MES category that contains the document you want to use.
  2. From the list in the Document field, select the document you want to use for your auto-reply.
  3. From the list in the Insert/Attach field, select whether you want to insert the document into the body of the reply, or attach it to the reply.

**Note:** The order in which you select your documents will be the order in which they are inserted into or attached to the response.



9. Click **Create**.

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

### **Associating Auto-Reply Rules with Accounts**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign auto-reply rules, must already exist on the email server and be defined in Email Center.

#### **Steps**

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

The selected auto-reply rule is added to the summary view table and its name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the auto-reply rule by clicking the hyperlinked name in the Email Processing Rules by Type column.

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

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

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

### **Creating Document Retrieval Rules and Associating Them with Accounts:**

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

This new method maps incoming email to a specific category in Marketing Encyclopedia System (MES). Different categories can be selected for different conditions defined using the rules engine. Documents in the category selected are displayed in the descending order of their usage.

The process of creating routes involves two tasks:

Creating Document Retrieval Rules, page 4-60

Associating Document Retrieval Rules with Email Accounts, page 4-62

### **Creating Document Retrieval Rules**

Use the following steps to create a document retrieval rule.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Rules Library** subtab.

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

3. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.

The Create Document Retrieval Rule page appears.

4. In the Name field, type a name for the document retrieval rule you are creating.
5. Optionally, in the Description field, type a short description for the document retrieval rule.
6. From the Retrieval Method list, select the method by which you want to retrieve documents and click **Go**.
7. If you want the document retrieval rule to apply to all incoming emails, click the All Emails box.

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

8. If you want your document retrieval rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the document retrieval rule should be applied to an incoming email.
  1. From the list in the Key field, select a key for the document retrieval rule you are creating.
  2. From the list in the Operator field, select an operator for the document retrieval rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the document retrieval rule you are creating.
9. If you selected **Keyword Matching** as your retrieval method:
  1. Select the repository you want to search.

You can select to search MES, Knowledge Management, or both.
  2. Select to search all categories within the chosen repository, or search for and select individual categories within the chosen repository.

**Note:** The All Categories option refers ONLY to all MES categories. It does not apply to categories in the Knowledge Management system.

10. If you selected **MES Category Mapping** as your retrieval method:

1. Search for and select the appropriate MES Category.
2. Click **Apply**.

11. Click **Create**.

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

### **Associating Document Retrieval Rules with Accounts**

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign document retrieval rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule. When using keyword matching rules, intent processing must be enabled for the account to which you are associating the rule.

#### **Steps**

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

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

4. From the list in the Email Account field, select the email account to which you want to assign the document retrieval rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The

number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

5. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.

The Account Association page appears.

6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the document retrieval rule you want to associate to the selected email account.
8. Ensure the Enabled box is checked for each document retrieval rule you want to use.
9. Click **Apply**.

The selected document retrieval rule is added to the summary view table and its name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the document retrieval rule by clicking the hyperlinked name in the Email Processing Rules by Type column.

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

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

**Note:** Rules cannot share the same priority level.

### **Creating Routing Rules and Associating Them with Accounts:**

Oracle Email Center automatically routes incoming emails to an agent group based on user-defined rules. There are two types of routes:

- Static - The rules for static routes are constructed using key value pairs extracted from the properties and content of the email.
- Dynamic - Dynamic Routes allow the use of PL/SQL procedures to access any data in the database and use as the basis for routing.

Administrators can define any number of static or dynamic routing rules and these routing rules are executed in priority order once the routing rule is assigned to an email account. Emails are routed to an agent group and not to the individual agent. An agent (resource) group is only valid if it contains at least one resource, which is assigned to an email account and has one of the Email Center Agent or Email Center Supervisor role

assigned to it. If none of the routing rules are satisfied, the email is routed to all agents belonging to that account.

One or more routing rules can be associated to an email account, for incoming emails addressed to that account to be routed to the respective destination group of agents.

The Account Association page enables routing rules to be associated with an email account. This Account Association must be enabled in order for that routing rule to be executed. Routing rules that are not enabled will not be executed. If you want to route an email back to the original agent, you can select **Original Agent**, from the list of resource groups in the Primary Destinations field.

Routing rule priorities perform the same function as classification priorities; they are used to determine the order in which the routing rules are executed. The priority of each routing rule is unique; the priority can be changed; and, in doing so, will affect the values of other routing rule priorities. By default, newly defined routing rules are assigned the lowest priority among existing routes.

The routing engine evaluates routes in order of priority, starting with 1. The first route, whose rules are satisfied, will determine the routing destination. At the end of the email processing, an email will have ONE and ONLY ONE destination (resource) group assigned to it. The routing engine will check the validity of a destination group before routing an email to that group; if the group does not contain a valid set of resources, the email is routed to the default destination group. If the default destination group does not contain a valid set of resources, the email is routed to all agents assigned to the email account. If the routes have been setup, but none are valid for the email being processed, the emails are routed to all agents assigned to the email account. If there are no routes setup, emails are routed to all agents assigned to the email account.

The process of creating routes involves two tasks:

Creating Routing Rules, page 4-64

Associating Routing Rules with Accounts, page 4-66

## **Creating Routing Rules**

Use the following steps to create a route.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### **Steps**

1. Click the **Administration** tab.

2. Click the **Rules Library** subtab.  
The Email Processing Rules page appears.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Routing.  
The Create Route page appears.
4. In the Name field, type the name of the route you are creating.
5. In the Description field, type a short description for the route you are creating.
6. From the Route Type list, select the route type, and click **Go**.
7. If you selected **Static**, the Create Route page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
  1. If you are going to utilize multiple rules, from the Rule Chaining list, select how you want those rules joined together.  
For any route, all rules can be chained using either AND or OR, but not both.
  2. From the list in the Key field, select a key for the routing rule you are creating.
  3. From the list in the Operator field, select an operator for the routing rule you are creating.
  4. From the list in the Value field, search for and select, or type a value for the routing rule you are creating.
  5. If you want the routing rule to apply to all emails, select the All Emails option.
8. If you selected **Dynamic**, the Create Route page refreshes to display a procedure area where you can define the procedure name and variables you want to use.

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

1. In the Procedure Name field, type a name for the procedure you will use for your dynamic route.
2. In the list in the OUT Parameter Type field, select the data type you want to use for your route.
3. From the list in the Operator field, select an operator for the routing rule you are creating.

4. From the list in the Value field, search for and select, or type a value for the routing rule you are creating.

9. Click **Create**.

The routing rule is created and appears in the summary view table under Routing on the Email Processing Rules page.

To update an existing route, click the route name hyperlink in the Email Processing Rules by Type column. The Update Route page appears, allowing you to update the description, the static rule keys, operators and values, or the procedure details.

To remove a route, click the delete icon (trash can) in the Add/Delete column for the routing rule you want to remove.

### **Associating Routing Rules with Accounts**

Use the steps below to associate a route with an email account.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign routing rules, must already exist on the email server and be defined in Email Center.

You must have at least one resource group, that contains a resource (agent) who has been assigned to the email account and has one of the Email Center roles assigned, in order to use that resource group when routing an email.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Processing Rules**.  
The Assign Email Processing Rules page appears.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Routing.  
The Account Associations page appears.
5. From the Email Account field, select the email account to which you want to associate the routing rule, and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account.



The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

6. From the list in the Name column, select the routing rule you want to associate to the selected email account.
7. From the list in the Primary Destination field, select the agent or resource group to which you want to route email.

**Note:** If you want to route the email back to the original agent, select **Original Agent**, from the list.

8. From the list or resource groups in the Default Destination field, select the group to which you want to route the email.

**Note:** The routing engine will check the validity of a Destination group before routing an email to that group; if the group does not contain a valid set of resources, the email is routed to the Default Destination Group. If the Default Destination Group does not contain a valid set of resources, the email is routed to all agents assigned to the email account.

**Note:** You can select **All Groups** if you want to route the message to all groups.

9. Click the Enabled box to enable the rule.

10. Click **Apply**.

The selected routing rule is added to the summary view table and it's name is displayed as a hyperlink in the Rule Name column. You can view the components of or update the routing rule by clicking the hyperlinked name in the Name column.

11. Repeat steps 5-9 to associate another route with the same email account <optional>.

To remove a route account association, click Delete icon (trash can) in the Add/Delete column corresponding to the routing rule association you want to remove.

## Rules Checkpoint: Verification

At this point a set of rules for email processing purposes should have been created for Email Center. Complete the following steps prior to performing the Business Data

Module steps, in order to confirm that the rules steps were successful.

1. Send one or more emails to each account matching the classification, auto-delete, auto-redirect, auto-reply, auto-acknowledge, and routing rules.
2. Log in as Email Center Agents belonging to different routing groups.
3. Confirm the following:
  - Agents can view all appropriate classifications.
  - Email counts are consistent with processing rules for each agent.
  - Inbound emails are routed to the correct classifications.
  - Emails you want automatically deleted (out of office notifications, etc.) are removed according to your auto-delete rules.
  - Emails you want automatically redirected to another account are redirected according to your auto-redirect rules.
  - Automatic replies are generated for appropriate emails according to your auto-reply rules.
4. Verify that the sending email account receives the correct auto-acknowledgement.

## Configuring Business Data

This section covers the steps required to perform the following:

- Creating and Configuring Intents, page 4-68
- Creating Categories and Hierarchies in MES, page 4-75
- Creating Documents, page 4-76
- Creating Queries, page 4-88
- Creating Custom Tags, page 4-90

### Creating and Configuring Intents:

The following tasks are involved in the intent creation process:

- Creating Intents, page 4-69
- Changing The Weight of Keywords, page 4-70

- Adding Keywords to an Intent, page 4-71
- Removing Keywords From an Intent, page 4-72
- Deleting Intents, page 4-73
- Associating Intents With an Email Account, page 4-73
- Removing Intent Associations With Email Accounts, page 4-74

## **Creating Intents**

### **Intent Creation Tips:**

- Consider the variations on these words/phrases that customers may use.
- Consider the words or phrases that distinguishes one intent from another.
- Do not include specific codes or numbers, for example: product codes, sizes, telephone numbers, order numbers unless they uniquely identify an intent.
- The intent name can be up to 50 characters long. It can consist of multiple words separated by a blank space.
- Intents should be mutually exclusive and should encompass the complete spectrum of questions that an organization expects to receive.

Use the steps below to create an Intent.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### **Steps**

1. Click the **Administration** tab.
2. Click the **Intents** subtab.  
The Intent Summary page appears, displaying a summary list of all created intents.
3. Click **Create**.
4. In the Intent Name field, type a name for the intent you are creating.

5. From the list in the Language field, select the language you want to use.
6. If you selected **English** as your language, you have the option of enabling theming. To do so, select the Enable Theming box.
7. In the Keyword Text for Questions field, type a list of question keywords or pieces of text that contain the desired keywords. Remember to separate the entries with a comma (,) or a space.

These are the keywords you would like to match against keywords extracted from incoming email.
8. In the Keyword Text for Responses, type a list of question keywords or pieces of text that contain the desired keywords. Remember to separate the entries with a comma (,) or a space.

These are the keywords you would like to use to find related documents from the knowledge base repositories.
9. Click **Continue**.

The Review Keywords page appears, displaying a list of the keywords you entered.
10. From the list in the Question Type Keywords area, assign each keyword an appropriate weight by selecting a number for the Weight list.
11. From the list in the Response Type Keywords area, assign each keyword an appropriate weight by selecting a number for the Weight list.
12. Click **Finish**.

The Intent Summary page appears and your new intent is added to the summary list.
13. You can click the icon in the View Documents column to see which documents your intent pulls from either MES or the Knowledge Base repository.

If your intent is not pulling the correct documents or not pulling them in the desired order, you can adjust each keyword's weight to get the result you want, or you can add or remove keywords from your intent.

### **Changing The Weight of Keywords in an Intent**

Use the steps below to alter the weight of the keywords in an Intent.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

### Prerequisites

The intent must already exist.

### Steps

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Update column of the summary table, click the Update icon corresponding to the intent you want to alter.

The Update Intent Keywords page appears.

4. In the weight field for each keyword, adjust the weight number.

You can adjust the weight number for both question type and response type keywords.

5. Click **Finish**.

The Intent Summary page appears.

6. You can click the icon in the View Documents column to see which documents your intent pulls from either MES or the Knowledge Base repository.

If your intent is not pulling the correct documents or not pulling them in the desired order, you can re-adjust each keyword's weight to get the result you want, or you can add or remove keywords from your intent.

### Adding Keywords to an Intent

Use the steps below to add keywords to an existing intent.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

### Prerequisites

The intent must already exist.

### Steps

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Update column of the summary table, click the Update icon corresponding to the intent you want to alter.

The Update Intent Keywords page appears.

4. Click **Add Keywords**.

The Add Keywords page appears.

5. Type the additional question and response keywords in the provided fields.

Remember to separate the entries with a comma (,) or a space.

6. Click **Continue**.

The Review Keywords page appears, displaying a list of the keywords you entered.

7. Assign each of your question and response keywords a weight.

8. Click **Finish**.

The Intent Summary page appears.

9. You can click the icon in the View Documents column to see which documents your intent pulls from either MES or the Knowledge Base repository.

If your intent is not pulling the correct documents or not pulling them in the desired order, you can adjust each keyword's weight to get the result you want, or you can add or remove keywords from your intent.

### Removing Keywords From an Intent

Use the steps below to remove keywords from an intent.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Update column of the summary table, click the **Update** icon corresponding to

the intent from which you want to remove keywords.

The Update Intent Keywords page appears.

4. In the Select column, click the box for the keywords you want to remove.

5. Click **Delete**.

The selected keywords are removed from the intent.

### **Deleting Intents**

Use the steps below to delete intents.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Delete column of the summary table, click the Delete icon corresponding to the intent you want to delete.

You receive a warning asking if you are sure you want to delete the selected intent.

**Note:** Before you can delete an intent, you must remove it's association to all email accounts.

4. Click **Yes**.

The selected intent is deleted.

### **Associating Intents With an Email Account**

Use the steps below to associate an intent with an email account.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

### Prerequisites

Both the intent and the email account must already exist.

### Steps

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Intents**.  
The Intent Association page appears.
4. From the account list, select the email account to which you want to associate an intent.
5. Move the intents you want to associate with the account from the Available Intents list to the Associated Intents list by either double-clicking each desired intent or selecting each intent and clicking the **Move** icon.  
If you want to associate all of the intents at once, you can click the **Move All** icon.
6. Click **Apply**.

### Removing Intent Associations With Email Accounts

Use the steps below to remove the association of an intent with an email account.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

none

### Steps

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Intents**.  
The Intent Association page appears.
4. From the account list, select the email account from which you want to remove the intent association.



5. Remove the intents you want from the email account by either double-clicking the intent in the Associated Intents list or selecting each intent and clicking the **Remove** icon.

If you want to remove all intent associations from the email account, you can click the **Remove All** icon.

6. Click **Apply**.

### **Creating Categories and Hierarchies in MES:**

Oracle Email Center uses the Marketing Encyclopedia System (MES) as its document repository. These documents are organized into categories for which a hierarchy can be defined.

MES provides you with the capability to organize documents into various categories (or folders). The MES repository is shared by all CRM applications and hence may contain documents not pertaining to Email Center.

Email templates or style sheets provided to an agent while composing new emails must be stored in MES. You can use these processes to create the categories under which you want to store these templates and then create a hierarchy among these categories.

This process involves the following tasks:

Creating Categories in MES, page 4-75

Defining a Hierarchy Among the Categories, page 4-76

### **Creating Categories in MES**

Use the steps below to add new MES categories.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator or Email Center Supervisor

#### **Prerequisites**

You must have assigned a MES Administrator resource role.

#### **Steps**

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Categories**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Categories**.  
The Category Manager page appears.
2. If no blank rows are available, click **Add Row(s)** and, when prompted, type the number of new rows you want to add and click **OK**.

3. In the provided fields, type the name of the new category, a description of it, and select its parent category.
4. Click **Update**.

### **Guidelines**

Read the content of the latest Oracle Email Center About Doc for important information about new features, post installation steps and other changes introduced with the release.

### **Defining a Hierarchy Among the Categories**

Use the steps below to create a hierarchy of MES categories.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator or Email Center Supervisor

#### **Prerequisites**

You must have assigned a MES Administrator resource role.

#### **Steps**

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Categories**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Categories**.  
The Category Manager page appears, displaying a list of categories.
2. In the Category Name column find the category that you want to become the sub-category.
3. From the list in the Parent Category column for that row, select the desired parent category.
4. Click **Update**.

### **Creating Documents:**

MES stores documents of any file type. Thus, documents stored in MES can be created using any third party software or Email Center's Template Editor. Through the SSA Console Template Editor, you can only create HTML type documents, although the content may be in HTML or plain text.

Any document, regardless of its file type can be attached to an outbound email. However an agent will only be able to insert the content of HTML or text file type documents into the body of an outbound email.

When composing a new message or replying to customer email, the Email Center agent has the option to use a Plain Text editor or a Rich Text editor. The latter provides the ability to change font, size, color and format of the text and insert images into the response. Hence, if the response document is an HTML document inserted into the body of the email contains embedded images (for logo etc.) then the original format of the response will only be retained if the agent is using the Rich Text editor.

Email Center agents can also manually browse through the MES categories or search for a specific document using the Knowledge Base tab.

### Merge Fields

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

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

In the following example:

- Dear ((\*CP\_TITLE\*)) ((?CP\_FIRST\_NAME?)) ((\*CP\_LAST\_NAME\*))

At the time an agent selects a document either for inserting or attaching into outbound email, values for merge fields CP\_TITLE and CP\_LAST\_NAME will be required, whereas a value for CP\_FIRST\_NAME will be optional.

### Email Center supports three types of merge fields:

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

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

### Customer Data Available from Customer Detail Page

Code	Description	Note
CP_LAST_NAME	Customer Last Name	PERSON_LAST_NAME from HZ_PARTIES table
CP_FIRST_NAME	Customer First Name	PERSON_FIRST_NAME from HZ_PARTIES table

<b>Code</b>	<b>Description</b>	<b>Note</b>
CP_MIDDLE_NAME	Customer Middle Name	PERSON_MIDDLE_NAME from HZ_PARTIES table
CP_PREFERRED_NAME	Customer Preferred Name	KNOWN_AS from HZ_PARTIES table
CP_TITLE	Customer Title	PERSON_TITLE from HZ_PARTIES table
CP_2ND_TITLE	Customer Second Title	PERSON_ACADEMIC_TITLE from HZ_PARTIES table
CP_SUFFIX	Customer Suffix	PERSON_NAME_SUFFIX from HZ_PARTIES table
CP_EMAIL_ADDRESS	Customer Email Address	EMAIL_ADDRESS from HZ_PARTIES table
CP_PRIMARY_EMAIL	Customer Primary Email Address	Data from HZ_PARTIES table
CP_PRIMARY_PHONE	Customer Primary Phone Number	Data from HZ_PARTIES table
CP_HOME_PHONE	Customer Home Phone Number	Data from HZ_PARTIES table
CP_WORK_PHONE	Customer Office Phone Number	Data from HZ_PARTIES table
CP_ADDRESS	Customer Address	Data from HZ_PARTIES table
CP_ADDR_LINE1	Customer Address Line 1	ADDRESS1 from HZ_PARTIES table
CP_ADDR_LINE2	Customer Address Line 2	ADDRESS2 from HZ_PARTIES table
CP_CITY	Customer Address City	CITY from HZ_PARTIES table

<b>Code</b>	<b>Description</b>	<b>Note</b>
CP_STATE	Customer Address State	STATE from HZ_PARTIES table
CP_PROVINCE	Customer Address Province	PROVINCE from HZ_PARTIES table
CP_POSTAL_CODE	Customer Address Postal Code	POSTAL_CODE from HZ_PARTIES table
CP_COUNTY	Customer Address County	COUNTY from HZ_PARTIES table
CP_COUNTRY	Customer Address Country	COUNTRY from HZ_PARTIES table
CP_ORGANIZATION	Customer Organization	Data from HZ_PARTIES table
CP_PARTY_ID	Party ID for the Customer	PARTY_ID from HZ_PARTIES table
CP_PARTY_NUMBER	Party Number for the Customer	PARTY_NUMBER from HZ_PARTIES table

#### **Contact Data Available from Contact Detail Page**

<b>Code</b>	<b>Description</b>	<b>Note</b>
CON_LAST_NAME	Contact Last Name	Contact Data from HZ_PARTIES table
CON_FIRST_NAME	Contact First Name	
CON_MIDDLE_NAME	Contact Middle Name	
CON_PREFERRED_NAME	Contact Preferred Name	
CON_TITLE	Contact Title	
CON_2ND_TITLE	Contact Second Title	

<b>Code</b>	<b>Description</b>	<b>Note</b>
CON_SUFFIX	Contact Suffix	
CON_EMAIL_ADDRESS	Contact Email Address	
CON_PRIMARY_EMAIL	Contact Primary Email Address	
CON_PRIMARY_PHONE	Contact Primary Phone Number	
CON_HOME_PHONE	Contact Home Phone Number	
CON_WORK_PHONE	Contact Office Phone Number	
CON_ADDRESS	Contact Address	
CON_ADDR_LINE1	Contact Address Line 1	
CON_ADDR_LINE2	Contact Address Line 2	
CON_CITY	Contact Address City	
CON_STATE	Contact Address State	
CON_PROVINCE	Contact Address Province	
CON_POSTAL_CODE	Contact Address Postal Code	
CON_COUNTY	Contact Address County	
CON_COUNTRY	Contact Address Country	
CON_ORGANIZATION	Contact Organization	
CON_PARTY_ID	Party ID for the Contact	
CON_PARTY_NUMBER	Party Number for the Contact	

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

#### Agent Data Available from JTF

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

#### Miscellaneous Data

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

#### Current Account Data

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

#### Current Inbound Message Data

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

#### **Auto Acknowledgement Merge Field Data**

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

1. Custom Merge Fields - These merge fields are defined by the administrator. A value for each custom merge field must be manually entered by the agent before inserting or attaching the associated document into an outbound email. At the time when a document is inserted or attached the custom merge field placeholder(s) will be dynamically replaced with the data entered by the agent for each one respectively.
2. SQL Merge Fields - These merge fields are defined by the administrator. SQL merge fields are automatically populated with information resulting from the execution of a document's associated SQL Query. All SQL merge fields used in a document should correspond to column aliases of the Select statement portion of the



document's associated SQL query. If bind variables are present in the Where clause of the SQL statement, the agent will be asked to enter valid values for them prior to executing the SQL query and, subsequently, auto-populating the document's SQL merge fields.

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

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

Dear customer,

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

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

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

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

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

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

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

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

## Auto-Acknowledge Templates

To utilize the Auto-Acknowledge features Oracle Email Center provides, you must first create auto-acknowledge templates in MES. These templates should be created as plain text documents or HTML documents, and stored in MES. A small number of "Auto Acknowledge" merge fields should be made available to be used in auto acknowledge templates. These merge fields relate to the information available in the incoming email header:

Merge Field Name	Description	Example
ACK_FROM_NAME	From Name	e.g. From field contains: "Joe.Smith"joe.smith@oracle.com" From Name = Joe Smith. If there is no name, this will default to "Customer"
ACK_RECEIVED _DATE	Incoming email received date	
ACK_REPLY_TO	Master Email Account Reply To value	
ACK_SENDER_NAME	Master Email Account Sender Name value	
ACK_SUBJECT	Incoming email subject	

You can perform the following tasks:

Creating and Publishing Documents, page 4-84

Uploading and Publishing Documents, page 4-86

Verifying the Document Was Successfully Published, page 4-87

Deleting Published Documents, page 4-87

### **Creating and Publishing Documents**

Use the steps below to create and publish a document for MES by using the template editor.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator or Email Center Supervisor

#### **Prerequisites**

You should have the MES Administrator role assigned and MES categories must be

created.

If you are going to use a custom merge field, then you must have first created and named that custom merge field on the Create Query page.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Editor**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Editor**.

The Create Document page appears.

2. In the Title field, type a name for your document.
3. In the Description field, provide a short description of the document.
4. In the Category field, search for and select the appropriate MES category in which you want to create your document.
5. In the Query Name field, you can search for and associate a query to the document.
6. Use the provided fields to select the type of merge field you want to use:
  1. If you want to use a standard merge field, from the Standard Merge Field list, select the option you want to use, and click **Insert**.
  2. If you want to use a custom merge field, type the name of the custom merge field in the Custom Merge Field field, and click **Insert**.

You can click the **Required** box to make your merge field required.

7. Click the hypertext link above the Template Body field to switch from plain text mode to rich text mode.

Rich text mode allows you to format the font of the email, and include an image or hyperlink in the email.

8. In the Template Body field, type the desired document content. Optionally, you can include the following in the document's content:
  - One or more standard merge fields by selecting a value from the Standard Merge Field list and clicking **Insert**.
  - One or more custom merge fields by entering a value in the Custom Merge Field text field and clicking **Insert**.
9. Click the **Spell Check** hyperlink to check the spelling of your template body text.
10. To preview the document before you publish it, click **Preview**.

11. Click **Publish**.

A conformation message appears, stating that you successfully published the document.

### **Uploading and Publishing Documents**

Use the steps below to import and publish a document for MES.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator or Email Center Supervisor

#### **Prerequisites**

You should have the MES Administrator role assigned and MES categories must be created.

#### **Steps**

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Publish**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Publish**.

The Publish Document page appears.

2. In the Title field, type a title for the document you are going to upload.
3. In the Description field, provide a short description of the document.
4. In the Category field, search for and select the appropriate MES category for your document.
5. Click **Upload File**.
6. In the Upload File browse box, click **Browse**, search for and select the file you want to upload.
7. Click **Upload**.

The Publish Document page refreshes and the selected file appears in the Files field.

8. Click **Publish**.

A confirmation message is displayed, stating that the new document has been published.

**Note:** If the documents loaded into MES will be used as suggested responses, a concurrent process needs to be run in order to rebuild the Oracle Text index for MES. You must submit a request to run the Rebuild Help Search Index concurrent process (refer to the Business Data Checkpoint section).

### **Verifying a Document Was Successfully Published**

MES provides a Category page for displaying categories and the documents published under each category. You can verify that a document has been successfully published (via Publish option or via Template Editor) by navigating to the category under which the document was published and viewing the document.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator or Email Center Supervisor

#### **Prerequisites**

You should have the MES Administrator role assigned and MES categories must be created.

#### **Steps**

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Browse**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Browse**.  
The Browse Documents page appears.
2. In the View column, click the View icon for the desired MES category.  
The Browse Documents page refreshes to display all the documents in the selected MES Category.
3. In the Title column, click the title of the desired document and the contents of the selected document appear in a separate pop-up window.

### **Deleting Published Documents**

Use the steps below to remove a MES document you published.

**Note:** You can only delete documents that you published. You cannot delete documents that have been published by other user names.

#### **Login**

HTML Login URL

## Responsibility

Email Center Administrator or Email Center Supervisor

## Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

## Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Browse**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Browse**.
2. In the View column, click the View icon for the desired MES category.  
The Browse Documents page refreshes to display all the documents in the selected MES category.
3. In the Select column of the table, select the box for the document you want to remove.
4. Click **Remove**.  
The page refreshes to display a confirmation message stating that the selected document was deleted.

## Creating Queries:

Use this procedure to create a query.

## Login

HTML Login URL

## Responsibility

Email Center Administrator or Email Center Supervisor

## Prerequisites

You must be assigned the JTF\_FM\_ADMIN role to create queries.

## Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Queries > Create**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Query > Create**.  
The Create Query page appears.
2. In the Query Title field, type a unique name for the query that you want to create.
3. In the Query Description field, type any free-form text that you want to use to

describe the query that you are creating.

4. In the Query String field, type the SELECT statement for the query.

**Note:** The alias for each column used in the SELECT statement must match the merge field name and must be enclosed within the valid merge field delimiters. To assist in this process, Email Center allows you to insert SQL merge fields. Do not end the query with a semicolon (;) or slash (/).

For example, if the document had following merge fields:

Dear ((\*FIRST\_NAME\*)) ((\*LAST\_NAME\*)),

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

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

```
SELECT CUSTOMER_FIRST_NAME "((*FIRST_NAME*))",  
CUSTOMER_LAST_NAME "((*LAST_NAME*)) ",  
PRODUCT_NAME "((*PRODUCT*)) ",  
RELEASE_DATE "((*DATE*)) "  
FROM ...  
WHERE ...
```

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

5. In the SQL Merge Field field, type the name of the merge field and click **Insert**.

An alias name for the column that matches the merge field is inserted at the end of the text in the Query String Editor.

**Note:** When typing a SQL merge field, you must use all capital letters. While no white spaces are allowed, you can use numerals and underscores (\_).

**Note:** Since the functionality to insert merge fields cannot recognize the current cursor position in the Query String editor, the merge field always gets inserted at the end of the statement. Therefore, Oracle recommends that you insert the merge fields immediately

after typing the corresponding column name.

When the user selects a document that includes SQL merge fields, he/she will be prompted to enter values for the bind variables entered in the WHERE clause unless the bind variable is a "standard" merge field itself. In such a case the bind variable will be populated automatically. The SQL query will be executed using the value for the bind variable when the associated document is previewed, inserted or attached.

**6. Click **Validate SQL**.**

You will be prompted to enter a value for the bind variables used in the query.

**7. Enter a random numeric or varchar value (depending on the data type of the corresponding column) for the bind variable, and click **Validate SQL**.**

You receive a confirmation messages stating that the validation was successful and the prompt you created in the Query String field is added.

**8. If you want to save your work and create the query, click **Create**.**

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

### **Creating Custom Tags:**

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

Tags fall into two categories:

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



The above data will be appended to every outbound email by default. Additionally, other business applications integrated with Email Center can pass a key-value pair relevant to their business using the tag listed below.

- BIZ\_KEY\_VAL - This is a variable key that enables business applications integrating with Email Center to pass values pertaining to their business. For example, the TeleService application may need to append the Service Request number.
- Custom - Custom tags are defined by the administrator. These tags are not appended to the email by default but have to be explicitly associated with each email account. The custom tags can be of the following types:
  - Fixed - These keys have a fixed value.
  - Query - These keys have a SQL call for retrieving the value at run-time.
  - Procedure - These keys have a valid PL/SQL procedure call that generates the value of the key at run time.

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

#### **Examples of custom tags:**

- All outgoing emails sent from a particular account should be flagged as a Priority, so a fixed tag "PRIORITYMAIL" is created with a value of "Priority". When an email is sent from this account it will include this tag. When a customer responds, the tag will be extracted and the incoming email will be classified as a "Priority" email based on the value of the tag and presented accordingly to the agent.
- A special offer is included with every outgoing email. This offer is only valid for 10 days after the email is sent out. A query tag "TENDAYOFFER" is created with a value of "select trunc(sysdate) from dual". When an email is sent from this account the SQL query is executed and the resulting value included in the tag. When a customer responds, the tag is extracted and the incoming email routed to the appropriate group of agents depending on whether the reply is within the 10 days.
- The ID of the Customer associated with the email message is used to look up sales volume for last month. A procedure tag "SALESVOL" is created with a value of "LOOKUP\_UP.SALES\_VOLUME". When an email is sent from this account the procedure is executed and the resulting value included in the tag. When a customer responds, the tag is extracted and based on the tag value the email is classified. If the value is >10000 then classify as "Premier Customer", if >5000 and <10000 then "Gold Customer", otherwise "Silver Customer".

Email Center will create a tag for each outbound email comprising of the system tags and custom tags associated with that account and generate a unique encrypted ID. This

unique encrypted ID is then enclosed within predefined tag markers and appended to the subject of the outgoing email as shown below:

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

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

Tag administration involves the following tasks:

- Creating Tags, page 4-92
- Associating Tags With Accounts, page 4-93
- Updating Tags, page 4-94
- Deleting Tags, page 4-94

## Creating Tags

Use the steps below to create tags for Email Center.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

none

### Steps

1. Click the **Administration** tab.
2. Click the **Tags** subtab.  
The Tags page appears.
3. Click **Create**.  
The Create Tag page appears.
4. Enter values for:
  - **Tag ID** - Any combination of alphanumeric characters a-z and A-Z, up to 26 characters in length.
  - **Tag Name** - Any combination of alphanumeric characters other than double

quote ("), less than (<) and greater than (>), up to 50 characters in length.

- **Type** - Select **Fixed**, **Procedure**, or **Query** from the list.
- **Value** - The value depends on the type selected above.

For Fixed type tags any alphanumeric character up to 256 characters is allowed.

For Procedure type tags a valid procedure name should be entered in the "package\_name.procedure\_name" format.

For Query type tags, a valid query should be entered without a semi-colon (;) or a slash (/) at the end.

5. Click **Create**.

The Account Association page appears. Follow the steps in the Associating Tags With Accounts, page 4-93 topic to associate this new tag with various email accounts.

### **Associating Tags With Accounts**

Use the steps below to associate tags with an email account.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

Both the tag and the email account must already exist.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Tags**.

The Account Association page appears.

4. In the Email Account field, select the account name from the list and click **Go**.

All tags already associated with that account are displayed in the Associated Tags field and all the available tags are displayed in the Available Tags field.

5. Select a tag from the Available Tags list.
6. Click the **Move** icon to associate the selected tag.

7. To associate all the available tags, click on the **Move All** icon.
8. To remove a tag - account association, select a tag from the Associated Tags list and click on **Remove** icon.
9. To remove all tag - account associations click on **Remove All** icon.
10. Click **Apply** to save changes.

### Updating Tags

Use the steps below to update tags.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps

1. Click the **Administration** tab.
2. Click the **Tags** subtab.  
The Tags page appears.
3. In the Name column, click the hyperlinked name of the tag you wish to update.  
The tag details (ID, Name, Type, and Value fields) are displayed on Update Tag page.
4. Update the Tag Name, Type or Value fields as necessary.
5. Click **Update** to save changes or **Restore** to undo the changes.

### Deleting Tags

Use the steps below to delete tags.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

The tag to be deleted should NOT be associated with any email accounts.

### Steps

1. Click the **Administration** tab.

2. Click the **Tags** subtab.

The Tags page appears.

3. Check the boxes corresponding to the tags you want to delete.

**Note:** If you realize you have clicked unwanted boxes, you can click **Restore** to uncheck all boxes. However, the Restore button does not rollback the delete operation. In other words the deleted tags cannot be undeleted by clicking **Restore**.

4. Click **Delete** to delete the selected tags.

**Note:** A custom tag can only be deleted if it is not associated with any email accounts.

## Business Checkpoint: Verification

At this point the basic Email Center implementation and configuration should be complete.

Complete the following steps in order to confirm that the business data steps were successful.

### Login

HTML Login URL

Forms Login URL

### Responsibility

Email Center Agent Console

Email Center Message Component

Email Center Administrator

### Prerequisites

none

### Steps

1. Click the **Monitoring** tab.

2. Click the **Concurrent Programs** subtab.

3. Click **Submit a New Request**.
4. Submit a request to run the Rebuild Help Search Index concurrent program.
5. Send an email to one of the email accounts you defined in Email Center. In the email body, use some of the sample keywords you supplied to create one of the intents you created.
6. Log in to the HTML Login URL as an Email Center agent (Email Center Agent Console responsibility) and fetch the email.
  1. Verify that the Intent and Suggested Responses relate to the email.
  2. Respond to the email using suggested response document.
  3. Compose a new email using a template stored in the Knowledge Base.
  4. Search for documents in the Knowledge Base and insert into the email.
  5. Send the email and confirm receipt.
  6. Confirm the following:
    - Suggested responses presented in Reply page.
    - Customer details displayed in Customer bin (successful customer lookup using email address).
    - Intents/Suggested Responses and confidence scores available.
    - Merge fields populated or prompt for entry and successfully inserted into email.
    - Able to insert/attach suggested response.
    - Template shown in bin on Compose page.
    - Merge fields populated.
    - Categories, hierarchies and documents visible.
    - Search for documents successful.
    - Able to insert/attach document from Knowledge Base Tab.
    - UWQ Inbound Email queues show correct counts.
    - UWQ Acquired Email queue shows correct counts and email details.

- Auto acknowledgement email received.
- Outbound Emails contain tag reference in the subject.

## Setting Up Auto-Creation and Auto-Update of Service Requests

After the basic Oracle Email Center implementation and configuration is complete, you can set up the auto-creation and auto-update of service requests.

### Steps

1. If Oracle Email Center will send notification emails, then create one or more email templates that contain the appropriate merge fields. For more information about merge fields, see *Merge Fields*, page 1-22. The following table shows the merge fields that typically apply to auto-notification with email messages.

#### *Merge Fields Applicable to Auto-Notification*

Merge Field	Description
ACCT_FROM_ADDRESS	Current Account From Email Address
ACCT_FROM_NAME	Current Account From Name
ACCT_REPLY_TO	Current Account Reply To Address
ACCT_SIG	Current Account Signature
ACK_ACCT_EMAIL_ ADDRESS	Auto Acknowledgment - Account email address
ACK_ACCT_FROM_NAME	Auto Acknowledgment - Full Name of the Account
ACK_RECEIVED_DATE	Auto Acknowledgment - Email received Date
ACK_SENDER_NAME	Auto Acknowledgment - Full Name of the Sender of the Inbound Email
ACK_SUBJECT	Auto Acknowledgment - Subject of the Inbound Email
INB_CC	Inbound Message Carbon Copy Address List

Merge Field	Description
INB_CLASSIFICATION	Inbound message classification
INB_EMAIL_ADDRESS	Inbound Message From Address
INB_SENT_DATE	Inbound Message Sent Date
INB_SUBJECT	Inbound Message Subject
INB_TO	Inbound Message To Address List
MD_CURR_DATE	Current System Date
MD_CURR_TIME	Current Current Time
SR_NUMBER	Service Request Number

The remaining Email Center standard merge fields are also available and may be appropriate to use in certain customer or contact scenarios.

In addition, you can use an SQL query to access any other service request attributes.

2. Set the following IEM profile options as required:
  - IEM: Integration: Auto Create Service Request Note Type - This profile option indicates the type of note to be used when a note that includes the content of the email body is automatically generated.
  - IEM: Integration: Service Request Summary Prefix - This profile option indicates the text to be used as a prefix for the service request summary. The email subject will be appended to this prefix and separated by a colon (:).
  - IEM: Integration: Employee Service Request cannot be created or updated - This profile option indicates what should be done to the email when the auto create service request process fails for an employee email.
  - IEM: Integration: Redirect Email Address - This profile option specifies the email address to which an email should be redirected if the auto create service request process fails for an employee email.
  - IEM: Integration: Customer Match Not Found - This profile option indicates what should be done to the email when a unique customer match is not found.



- IEM: Integration: Email Notification upon Auto Create Service Request and IEM: Integration: Email Notification upon Auto Update Service Request - These profile options indicate whether the notification that a service request has been auto created or updated be sent via Email Center.
3. Set up Service: Default Customer Name.

This profile is required for auto creating service requests for employee and contingent worker emails.
  4. Confirm the desired setup of service request attributes based on service request default profile option settings either at the site level or the responsibility level for the Email Center Administrator. The TeleService application handles the defaulting of these service request attributes:
    - Service Request Owner
    - Service Request Owner Type
    - Severity
    - Status
    - Urgency
  5. Confirm the setup of other related service request functions such as automatic assignment and task creation. The Oracle TeleService application handles these based on the default profile option settings.
  6. Create Email Parser definitions for use with Service Request Auto-Processing rules. See *Creating Email Parser Definitions*, page 4-50 and *Creating Auto-Processing Rules and Associating Them with Email Accounts.*, page 4-49
  7. Create Service Request Auto-Processing rules and include any desired Email Parser definitions in them. See *Creating Auto-Processing Rules and Associating Them with Email Accounts.*, page 4-49
  8. Associate a Service Request Auto-Processing rule with each email account for which such processing is desired. See *Creating Auto-Processing Rules and Associating Them with Email Accounts.*, page 4-49
  9. In an Email Center notification email, include the associated service request number as part of the tag so that the Email Center processing engine can extract it if a customer or employee responds to the notification. A seeded Update Service Request auto-processing action is performed if the service request number tag is found in the email. When defining a rule of this type, you must also select a valid status code.



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## Administration Tasks

This chapter covers the following topics:

- Email Center Site Profile Options
- Email Accounts
- Rules Library
- Intents
- Email Parser
- Tags
- Purge
- Documents
- Queries
- Custom Dictionary
- Resource Groups
- Download Processor
- Outbox Processor
- Concurrent Programs
- Migration

### Email Center Site Profile Options

Use the Profile hyperlink to set the Email Center Site Profile Options.

#### Login

HTML Login URL

#### Responsibility

### Prerequisites

none

### Steps

1. Click the **Profile** hyperlink.
2. From the side panel, click the **Email Center** hyperlink.  
The Email Center Site Profile Options page appears.
3. Set the following profile options:
  - **Default Spell Checking Dictionary** - This profile option specifies the language used when spell checking your email messages. From the list, select the dictionary for the appropriate language you want to use for spell checking.
  - **Spell Check Messages Before Sending** - This profile option lets you determine whether Oracle Email Center will automatically start the spell checking process prior to sending your message. Select **Yes**, to have the spell checker automatically begin. If you select **No**, you can still manually check the spelling in your email messages.
  - **Default Customer Number** - As explained above, a valid customer record is required for recording interactions. Email interactions for which either a customer could not be identified automatically or selected manually by an agent will be recorded against this "Default Customer". To select a previously created customer record as the default, perform the following steps:
    1. Click the flashlight icon.  
The "Email Center Default Customer Search" screen pops up.
    2. Select the search criteria by checking the corresponding radio button(s).
    3. Enter the search criteria.
    4. Click **Search**.  
The customer records that match the search criteria are displayed.
    5. Check the radio button of the appropriate customer record.
    6. Click **Apply**.  
The search window closes automatically and the Default Customer Number profile option is populated.
  - **Cache Update Frequency** - This profile option determines the frequency with

which the Email Center Agent Console cache is refreshed. You can enter any number between 5 and 60, the unit of measurement being minutes.

- **Default Resource Number** - All interactions must also be associated with a valid resource. Since Email Center includes automated processing actions that do not involve an agent (resource), we need a resource number to record interactions for the same. Use the Resource Manager application (as explained in the "Creating Resources" section) to create or search for a resource that will be used by default. Make a note of the resource number and enter it in the "Default Resource Number" profile option.
- **Default Service Request Status Template** - When you select a template in this profile option, upon creating a Service Request, the title of the template is displayed as a hyperlink in the Service Request container with "Insert" and "Attach" options underneath it. This enables agents to insert a predefined SR status template with a single click rather than having to browse through the Knowledge Base repository for templates. In the Default SR Status Template field, search for and select the template you want to use as your default service request template.
- **Reply to All** - This profile option provides the ability to reply to all recipients copied on the incoming email. If an incoming email contains multiple email addresses in the "To" and "Cc" fields, then each of those addresses are automatically applied (copied) to the outbound response as well. From the list, select **Yes** or **No**.
- **Include Incoming Attachments when Replying** - If you set this profile option to **Yes**, then the original attachments will automatically be attached to the reply being composed and the titles of the attachments will be displayed in the "Attachments" section. From the list, select **Yes** or **No**.
- **Number of Intents With Pre-fetched Responses** - This profile option sets the number of intents against which Email Center will match keywords to produce response documents. If an incoming email maps to more intents than specified by this profile option, the agent can view the additional response documents by clicking More, then clicking the appropriate intent names.

4. Click **Update**.

## Email Accounts

To receive email messages in Email Center, you must first have accounts on an IMAP compliant mail server. These accounts must then be defined in Email Center. You can use the Email Accounts subtab in the Email Center Administration Console to set up and maintain these email accounts. The Email Accounts subtab also allows you to

assign agents to email accounts, associate processing rules to email accounts, associate intents with email accounts, and associate tags with email accounts.

### Creating an Email Account:

To receive email messages in your Email Center, you must create email accounts on your IMAP compliant email server. Once created on the email server, these email accounts must be defined using the accounts functionality of the Email Center Administration console.

#### Email Account Settings

Field Name	Description
Email Address	This is the combination of the email account name - a unique name that identifies the account in the system, and the domain name for the email account.
Display Name	Default name representing the sender of emails from this account. See the Email Center Site Profiles section for more details on how this name is used.
Description	Allows you to type a description for the account. This description will appear in the Email Account Details section of the Summary page.
Reply To	A valid email account name (e.g. support@oracle.com) to which you wish to have "reply" email messages sent in response to an outgoing email sent from this account. If you leave this field blank, the address specified in the Email Address field will be used.
Return Path	Allows you to specify an alternate return path for email replies. If you leave this field blank, the same return path will be used as for the address specified in the Email Address field.

Field Name	Description
Status	<p>Allows you to set the status of the email account to "Active" or "Inactive". When the status is set to "Active", Email Center validates that the email account exists on the mail server and the following folders exist for that email account:</p> <ul style="list-style-type: none"> <li>• Oracle Processed</li> <li>• Oracle Retry</li> </ul> <p>Email Center will automatically create the above folders if they do not exist.</p> <p>Please note that these folder names are case sensitive.</p>
Account Name	<p>This is the account name that is displayed in the Email Center Agent Console and Message Component. This account name must already exist on the IMAP compliant email server before setting the account to "Active" in Email Center.</p>
Password	<p>Password to access the email account.</p>
Re-enter Password	<p>Confirmation of the password to access the email account.</p>
IMAP Host	<p>Host name for the incoming email server.</p>
IMAP Port	<p>Port number for the incoming email server. Default value is 143.</p>
SMTP Host	<p>Host name for the outgoing email server.</p>
SMTP Port	<p>Port number for the outgoing email server. Default value is 25.</p>

Field Name	Description
Language	Language of the incoming emails being sent to this account. This is used to tie the email account being defined to a specific language for intent processing. Email Center supports intent processing in multiple languages and this ability is accomplished using the assumption that an email account receives email of the same language.
Account Type	Allows you to set the account type to "External" or "Internal". External accounts are defined to receive emails from external parties such as customers, partners, resellers, and so on. Internal accounts are set up to receive emails from internal employees.
Allow Queue Access	Allows you to indicate whether or not the account is enabled for queue access. If this field is marked Yes, then all the underlying classification queues under this email account are enabled for access by selective picking of emails.
Intent Analysis	Allows you to determine the method by which Email Center extracts keywords for intents. "Themes" can only be used with the English language.
Spell Checking Dictionary	Allows you to use the default site dictionary for spell checking, or specify a particular dictionary language to use.
Customized Processing Flow	Email Center ships with default workflow called the 'Mail Pre-processing' workflow. If you are planning to implement any customizations to the out-of-the-box Email Center application, you can force the email processing to invoke your customizations by enabling this field.



Field Name	Description
Default Email Template Category	Allows you to specify a default category for email templates. If you do not select a category, templates will not appear on the Compose or Reply pages of the Email Center Message Component.
Sender Name for Outbound Email	Allows you to specify whether you want the agent's name of the name you typed in the Display Name field to appear as the sender name on outbound email.

Use this procedure to create email accounts.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

The email account must already exist on the HTML compliant email server before setting it's status to "Active" in Email Center.

You should know your IMAP and SMTP host names and port numbers.

### Steps

1. Click the **Administration** tab.
2. In the side panel, click **Summary**.  
The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.
3. Click **Create**.
4. Provide all of the mandatory information and any optional information you want to include.

**Tip:** If you have not implemented any customizations in the Mail Preprocessing workflow, you should select the "Disabled" value for the Customized Processing Flow field. Setting the value to "Disabled" reduces Email Center processing time that would otherwise be used to call and execute the Mail Preprocessing

workflow.

5. Click **Apply**.

### **Modifying an Email Account:**

**Note:** You cannot update the email account name or the domain name. To change these, you must first delete the account and create a new one with the correct email account name and domain.

Use this procedure to update your email accounts.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The email account must already exist on the HTML compliant email server before setting it's status to "Active" in Email Center.

You should know your IMAP and SMTP host names and port numbers.

#### **Steps**

1. Click the **Administration** tab.
2. In the side panel, click **Summary**.  
The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.
3. In the Update column, click the **Update** icon for the account you want to modify.
4. Modify the fields as you need.
5. Click **Apply**.

You are returned to the Summary page and you receive a confirmation note stating that the selected account has been modified.

### **Deleting an Email Account:**

You can delete email accounts by using the accounts functionality of the Email Center Administration Console.

Email accounts cannot be deleted if:

- Email messages exist that were composed as responses to an email message sent to the email account, and which have not been sent.
- Agents are associated with the email account.
- Email messages have been received but have not yet been processed.
- Email messages exist in the queues for the email account or email messages exist in the classification folder for the email account.

When email accounts are deleted, the following items are also deleted:

- The associations of Email Center classifications and the email account
- The associations of Email Center routes and the email account
- The associations of the email processing rules and the email account
- The associations of custom tags and the email account
- The associations to MES document search categories and the email account
- Intents associated with the email account

Use this procedure to delete email accounts.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

The email account must already exist on the HTML compliant email server before setting it's status to "Active" in Email Center.

You should know your IMAP and SMTP host names and port numbers.

### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. In the side panel, click **Summary**.

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

4. In the Select column, select the box for the email account you want to delete.

5. In the Delete column, click the **Delete** icon (trashcan) for the email account you want to delete.
6. Repeat the previous step for each email account you want to delete.

### **Duplicating an Email Account:**

Use the steps below to duplicate an existing email account.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The email account you want to duplicate must already exist.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. In the side panel, click **Summary**.

The Email Accounts page appears displaying all of the email accounts that have been defined for your Email Center system.
4. In the Select column, select the box for the email account you want to duplicate.
5. Click **Duplicate**.

The Create Email Account page appears, with the IMAP and SMTP server information populated for the new account. Additional parameters are also automatically copied to reflect the values selected in the email account from which the account is duplicated.
6. Provide all of the mandatory information and any optional information you want to include.
7. Click **Apply**.

### **Assigning Agents to Email Accounts:**

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

#### **Login**

HTML Login URL

## Responsibility

Email Center Administrator

## Prerequisites

Both the email account and the agent must already exist in the system.

## Steps

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

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

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

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

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

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

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

### **Removing Agents from Email Accounts:**

You can remove agents from email accounts so that they will not be able to access email messages sent to the account. However, agents can only be removed (unassigned) if there are no fetched email messages for that agent.

Use this procedure to remove assigned agents from an email account.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The agent must already be assigned to the email account.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. In the side panel, click **Agents**.  
The Agents and Accounts Assignment page appears.
4. From the Assign list, select **Agents to Accounts** and click **Go**.

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

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

5. If you want to remove selective agents from the email account, from the Assigned Agents list, select the agent(s) that you want to remove from the email account and then click the **Remove** icon.

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

**Note:** Agents can only be removed (unassigned) if there are no fetched email messages for that agent, meaning that the number in brackets, after the agent name, is zero (0).

6. If you want to remove all assigned agents from the email account, click the **Remove All** icon.
7. If you want to save your work and remove the assigned agent(s) from the email account, click **Apply**.

A confirmation message appears indicating that the agent(s) has been successfully removed (unassigned) from the email account.

### **Assigning Email Accounts to Agents:**

Use this procedure to assign email accounts to an Agent.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

Both the email account and the agent must already exist in the system.

#### **Steps**

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

agent, in the Last Name field, type the last name of the agent.

4. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.
5. If you want to search for an agent based on their assigned Email Center resource roles, from the Resource Role list, select the resource role.

6. Click **Search**.

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

7. In the Select column, select the agent you want to assign to email accounts.

8. Click **Assign Email Account**.

The Agents and Accounts Assignment page refreshes with the list of available email accounts displayed in the Available Email Account list. The Assigned Email Account list displays the list of email accounts that had previously been assigned to the agent.

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

9. If you want to assign selective email accounts to the agent, do one of the following.
  1. From the Available Email Accounts list, double click to select the email account that you want to assign to the agent.
  2. From the Available Email Account list, select the account(s) that you want to assign to the agent and then click the **Move** icon.

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

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

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



## Removing Email Accounts from Agents:

Use this procedure to remove assigned email accounts from an Agent.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

The email account must already be assigned to the agent.

### Steps

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. In the side panel, click **Agents**.  
The Agents and Accounts Assignment page appears.
4. From the list in the Assign field, select **Accounts to Agents** and click **Go**.
5. Enter the search criteria to search for the agent(s) for whom you want to remove an assigned email account.
  1. If you want to search for an agent using the agent's user name, in the Agent User Name field, type the name of the agent.
  2. If you want to search for an agent using the first name of the agent, in the First Name field, type the first name of the agent.
  3. If you want to search for an agent using the last name (family name) of the agent, in the Last Name field, type the last name of the agent.
  4. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.
  5. If you want to search for an agent based on their assigned Email Center resource roles, from the Resource Role list, select the resource role.
6. Click **Search**.  
The agent search results appears listing the agents which were found to match the given search criteria.
7. In the Select column, select the box next to the agent user name of the user for

whom you want to remove assigned email accounts.

**8. Click Assign Email Account.**

The Agents and Accounts Assignment page refreshes with the list of available email accounts displayed in the Available Email Account area. The Assigned Email Account list displays the list of email accounts that are currently assigned to the agent.

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

- 9.** If you want to remove selective email accounts from an agent, from the Assigned Email Account list, select the account(s) that you want to remove from the agent and then click the **Remove** icon.

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

**Note:** Accounts can only be removed (unassigned) if there are no fetched email messages for that agent, meaning that the number in brackets, after the email account name, is zero (0).

- 10.** If you want to remove all assigned email accounts from the agent, click the **Remove All** icon.

- 11.** If you want to save your work and remove the assigned email account(s) from the agent, click **Apply**.

A confirmation message appears indicating that the email account(s) has been successfully removed (unassigned) from the agent.

**Associating Classification Rules:**

For incoming emails addressed to a specific account to be assigned to the respective queue, one or more classifications must be associated to that email account. This account association must be enabled in order for a classification to be executed. A classification must be associated to an account before the classification queue (bearing the same name as the classification rule) appears for that account. Classifications that are not enabled will not be executed. Classification priorities are used to determine the order in which each classification and its rules are executed. The priority of each classification is unique; the priority can be changed; and, in doing so, it will affect the values of other classification priorities. By default, newly defined classifications are

assigned the lowest priority among the existing classifications.

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

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

The accounts to which you will assign classification rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule.

### **Steps**

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

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the classification rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
5. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.

The Account Association page appears.
6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Classification Name column, select the classification rule you want to associate to the email account.
8. Ensure the **Enabled** checkbox is selected.
9. Click **Apply**.

The selected classification rule is added to the summary view table and it's name is

displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the classification by clicking the hyperlinked name in the Classification Name column.

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

10. If you are associating additional classification rules to an email account, use the Priority list on the Assign Email Processing Rules page to determine a hierarchy among the classification rules.

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

### **Associating Auto-Delete Rules:**

Auto-delete rules allow you to control the automatic deletion of inbound emails without processing them. If the criteria in an auto-delete rule is met by an incoming email message, further processing of the email is terminated. This type of rule will prevent the processing of junk email such as bounced messages and spam.

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign auto-delete rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule.

#### **Steps**

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

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

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

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

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

The Account Association page appears.

6. Ensure that the correct email account is displayed in the Email Account field.

7. From the list in the Rule Name column, select the auto-delete rule you want to associate with the selected email account.

8. Ensure the **Enabled** box is checked for each auto-delete rule you want to use.

9. Click **Apply**.

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

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

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

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

### Associating Auto-Acknowledge Rules:

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

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

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

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

The accounts to which you will assign auto-acknowledge rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule.

### **Steps**

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

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the auto-acknowledge rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
5. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Acknowledge.

The Account Association page appears.
6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the auto-acknowledge rule you want to associate to the selected email account.
8. Ensure the Enabled box is checked for each auto-acknowledge rule you want to use.
9. Click **Apply**.

The selected auto-acknowledge rule is added to the summary view table and it's name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the auto-acknowledge rule by clicking

the hyperlinked name in the Rule Name column.

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

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

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

### **Associating Auto-Processing Rules:**

Auto-processing rules define the processing actions that are automatically performed on incoming emails. Such actions include creating or updating service requests or executing custom procedures.

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign auto-processing rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Processing Rules**.  
The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the auto-processing rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to

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

5. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Processing.  
The Account Association page appears.
6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the auto-processing rule you want to associate to the selected email account.
8. Ensure the Enabled box is checked for each auto-processing rule you want to use.
9. Click **Apply**.

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

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

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

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

### **Associating Auto-Redirect Rules:**

Auto-redirect rules enable you to redirect the incoming email to another Oracle Email Center account or an external email address. Oracle Customer Interaction History will be recorded in both cases.

If an old email address or account is terminated then a auto-redirect rule can reroute emails received for that old account to a new account. When an email is rerouted to another Oracle Email Center account, the email will be reprocessed based on rules defined for that account.

Auto-redirect to an external email address enables incoming emails to be redirected to an agent's external email address if the agent currently cannot log into the Oracle Email Center application



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

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

The accounts to which you will assign auto-redirect rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule.

### **Steps**

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

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the auto-redirect rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
5. In the Add/Delete column, click the add icon (plus sign) corresponding to Auto-Redirect.

The Account Association page appears.
6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the auto-redirect rule you want to associate to the selected email account.
8. Ensure the Enabled box is checked for each auto-redirect rule you want to use.
9. Click **Apply**.

The selected auto-redirect rule is added to the summary view table and it's name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the auto-redirect rule by clicking the hyperlinked

name in the Email Processing Rules by Type column.

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

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

**Note:** Rules cannot share the same priority level.

### **Associating Auto-Reply Rules:**

Auto-reply rules allow you to determine whether you want to automatically reply to an incoming email using a specified document.

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign auto-reply rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule.

#### **Steps**

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

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

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

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

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

The Account Association page appears.

6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the auto-reply rule you want to associate to the selected email account.
8. Ensure the Enabled box is checked for each auto-reply rule you want to use.
9. Click **Apply**.

The selected auto-reply rule is added to the summary view table and its name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the auto-reply rule by clicking the hyperlinked name in the Email Processing Rules by Type column.

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

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

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

### **Associating Document Retrieval Rules:**

Document retrieval rules allow you to determine whether you want the response document retrieval process to be based on matching keywords extracted from the incoming email to the keywords in documents stored in the Knowledge Base repositories, or based on a mapping of the incoming email to a specific category in Marketing Encyclopedia System (MES).

Different categories can be selected for different conditions defined using the rules engine.

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

## Prerequisites

The accounts to which you will assign document retrieval rules, must already exist on the email server and be defined in Email Center.

Before you can assign a processing rule to an email account, you must first create the processing rule. When using keyword matching rules, intent processing must be enabled for the account to which you are associating the rule.

## Steps

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

The Assign Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
4. From the list in the Email Account field, select the email account to which you want to assign the document retrieval rule(s) and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account. The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.
5. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.

The Account Association page appears.
6. Ensure that the correct email account is displayed in the Email Account field.
7. From the list in the Rule Name column, select the document retrieval rule you want to associate to the selected email account.
8. Ensure the Enabled box is checked for each document retrieval rule you want to use.
9. Click **Apply**.

The selected document retrieval rule is added to the summary view table and it's name is displayed as a hyperlink in the Email Processing Rules by Type column. You can view the components of or update the document retrieval rule by clicking the hyperlinked name in the Email Processing Rules by Type column.

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

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

**Note:** Rules cannot share the same priority level.

### **Associating Routing Rules:**

Routing rules allow you to designate rules for routing incoming emails to the original agent, or a specified group of agents.

By assigning routing rules to accounts, you are assigning primary and default destinations to which you want the email to be routed. Remember that "Original Agent" is available as a choice for Primary destination and "All Groups" is available as a choice in Default destination. If the route is satisfied, the primary destination is the first choice; however, if the primary destination is not valid for any reason, the email will be routed to the default destination. If the default destination is also not valid, then the email will be routed to "All Groups".

To ensure that every email is processed, by default an email will get routed to all agents assigned to that email account if:

- The administrator does not associate any routing rule to that email account OR
- All the routing rules assigned to that account fail.

**Note:** This page only allows you to assign existing processing rules to existing accounts. Both the rule you want to assign and the account to which you want to assign the rule, must already exist.

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The accounts to which you will assign routing rules, must already exist on the email server and be defined in Email Center.

You must have at least one resource group, that contains a resource (agent) who has been assigned to the email account and has one of the Email Center roles assigned, in order to use that resource group when routing an email.

Before you can assign a processing rule to an email account, you must first create the processing rule.

## Steps

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Processing Rules**.  
The Assign Email Processing Rules page appears.
4. In the Add/Delete column, click the add icon (plus sign) corresponding to Routing.  
The Account Associations page appears.

5. From the Email Account field, select the email account to which you want to associate the routing rule, and click **Go**.

The summary view table on the Assign Email Processing Rules page refreshes to display any existing processing rules assigned to the selected email account.

The number of rules currently assigned to the email account appears in parentheses for each type of processing rule in the Email Processing Rules by Type column.

6. From the list in the Name column, select the routing rule you want to associate to the selected email account.
7. From the list in the Primary Destination field, select the agent or resource group to which you want to route email.

**Note:** If you want to route the email back to the original agent, select **Original Agent**, from the list.

8. From the list or resource groups in the Default Destination field, select the group to which you want to route the email.

**Note:** The routing engine will check the validity of a Destination group before routing an email to that group; if the group does not contain a valid set of resources, the email is routed to the Default Destination Group. If the Default Destination Group does not contain a valid set of resources, the email is routed to all agents assigned to the email account.

**Note:** You can select **All Groups** if you want to route the message to all groups.

9. Click the Enabled box to enable the rule.

10. Click **Apply**.

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

11. Repeat steps 5-10 to associate another route with the same email account <optional>.

To remove a route account association, click Delete icon (trash can) in the Add/Delete column corresponding to the routing rule association you want to remove.

### **Deleting Processing Rule Associations:**

If you decide you do not want a particular processing rule assigned to an email account, the Email Center Administration console allows you to delete its assignment to that account.

Use the steps below to delete a processing rule assignment to an email account.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

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

The Assign Email Processing Rules page appears.

4. From the list in the Email Account field, select the email account from which you want to delete the processing rule assignment(s) and click **Go**.

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

5. In the Email Processing Rules by Type column, click the + sign icon for the rule type containing the processing rule assignment you want to delete.

The summary view table expands to display all processing rules of the selected type that are associated to the selected email account.

**Note:** You must expand the rule type before you can delete its rule assignments.

6. In the Select column, click box corresponding to the rule association you to delete, and click **Delete**.

The association is deleted and you receive a confirmation note stating that the rule and email account association has been removed successfully.

### **Associating Intents With Email Accounts:**

Use the steps below to associate intents with an email account.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The email account and the intent must already exist.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Intents**.  
The Intent Association page appears.
4. From the list in the account field, select an account with which you want to associate an intent.
5. From the Available Intents list, double-click to select each intent that you want to associate to the email account, or click the intent and click **Move**.

If you want to assign all of the intents listed in the Available Intents list at once, click **Move All**.

The selected Intents move from the Available Intents field to the Associated Intents field

6. Click **Apply**.



## Removing Intent Associations:

Use the steps below to remove intent associations with an email account.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

The email account and the intent must already be associated.

### Steps

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Intents**.  
The Intent Association page appears.
4. From the list in the account field, select an account with which you want to associate an intent.
5. From the Associated Intents list, double-click to select each intent that you want to remove from the account, or click the intent and click **Remove**.

If you want to remove all of the intents listed in the Associated Intents list at once, click **Remove All**.

The selected intents move from the Associated Intents field to the Available Intents field

6. Click **Apply**.

## Associating Tags to Email Accounts:

Email Center utilizes two categories of tags:

- System - System tags are seeded key value pairs, which are maintained and processed by the Email Center server processing engine.
- Custom - Custom tags are defined by the administrator. These tags are not appended to the email by default but have to explicitly associated with each email account.

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

**Note:** This page only allows you to assign existing custom tags to existing accounts. Both the custom tag you want to assign and the account to which you want to assign the tag, must already exist.

Use the steps below to associate custom tags to email accounts.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

Both the tag and the email account must already exist.

### **Steps**

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Tags**.  
The Account Association page appears.
4. In the Email Account field, select the account name from the list and click **Go**.  
All tags already associated with that account are displayed in the Associated Tags field and all the available tags are displayed in the Available Tags field.
5. Select a tag from the Available Tags list.
6. Click the **Move** icon to associate the selected tag.
7. To associate all the available tags, click on the **Move All** icon.
8. To remove a tag - account association, select a tag from the Associated Tags list and click on **Remove** icon.
9. To remove all tag - account associations click on **Remove All** icon.
10. Click **Apply** to save changes.

### **Removing Tag Associations:**

Use the steps below to remove tag associations from email accounts.

### **Login**

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

The email account and the tag must already be associated.

### Steps

1. Click the **Administration** tab.
2. Click the **Email Accounts** subtab.
3. From the side panel, click **Tags**.

The Account Association page appears.

4. From the list in the Accounts field, select the account from which you want to remove the tag association.
5. From the Associated Tags list, double-click to select each tag that you want to remove from the account, or click the tag and click **Remove**.

If you want to remove all of the tags listed in the Associated Tags list at once, click **Remove All**.

The selected tags move from the Associated Tags field to the Available Tags field

6. Click **Apply**.

## Rules Library

The Email Center Administration console provides an interface where you can define rules for all processing and automated processing actions, including:

- **Classification** - This rule type is defined to determine the classification or category of an email. For each classification associated to an email account, a folder of same name will be created for that account.
- **Auto-Delete** - This type of rule pertains to automatically deleting incoming emails such as bounced messages or spam without processing it.
- **Auto-Acknowledge** - This type of rule pertains to sending an auto-acknowledgement to the sender of the email.
- **Auto-Processing** - This type of rule pertains to processing actions that will be performed automatically on the incoming email such as update the status of an existing service request or execute a custom procedure. An inbound parser

definition can be associated with an auto-processing rule.

- **Auto-Redirect** - This type of rule pertains to automatically redirecting emails to different accounts.
- **Auto-Reply** - This rule type pertains to either automatically replying to an incoming email using specified documents.
- **Document Retrieval** - This rule pertains to retrieving probable response documents.
- **Routing** - This rule type pertains to routing an email to an agent or resource group of agents.

### Creating Classification Rules:

Classifications are user-defined categories or queues that emails are placed in depending upon their properties and content. For example, classifications could be used to define various service levels, distinguish between customers, etc. Classifications can also be used by the routing engine as one of the criteria upon which an email is delivered to a group of agents. You define a classification rule to determine the classification or category of an email. A rule is composed of a set to keys, operators, and values. Many rules can be combined, using rule chaining, to create a complex classification rule.

A classification must be associated to an account before the classification queue (bearing the same name as the classification rule) appears for that account.

Use the following steps to create a classification rule.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.

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

3. In the Add/Delete column, click the add icon (plus sign) corresponding to Classification.

The Create Classification page appears.

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

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

**Dynamic** classifications classify based on criteria Email Center does not know out of the box. For example: if you wanted to classify incoming emails as "Gold" based on revenue statistics which exist in some customized table or external system, you can write a procedure that determines the value parameter by which the email would be classified as "Gold" or not.

7. If you selected **Static**, the Create Classification page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
  1. From the list in the Key field, select a key for the classification rule you are creating.
  2. From the list in the Operator field, select an operator for the classification rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the classification rule you are creating.
8. If you selected **Dynamic**, the Create Classification page refreshes to display a procedure area where you can define the procedure name and variables you want to use.

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

1. In the procedure Name field, type a name for the procedure you will use for your dynamic classification.
2. In the list in the OUT Parameter Type field, select the data type you want to use for your classification.
3. From the list in the Operator field, select an operator for the classification rule you are creating.

4. From the list in the Value field, search for and select, or type a value for the classification rule you are creating.

9. Click **Create**.

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

### **Creating Auto-Delete Rules:**

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

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.

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

The Create Auto-Delete Rule page appears.
4. In the Name field, type a name for the auto-delete rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-delete rule.
6. From the list in the Key field, select a key for the auto-delete rule you are creating.
7. From the list in the Operator field, select an operator for the auto-delete rule you are creating.

8. From the list in the Value field, search for and select, or type a value for the auto-delete rule you are creating.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

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

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

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

### **Creating Auto-Acknowledge Rules:**

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

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

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

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

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

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

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

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

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

### **Steps**

1. Click the **Administration** tab.

2. Click the **Rules Library** subtab.

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

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

The Create Auto-Acknowledge Rule page appears.

4. In the Name field, type a name for the auto-acknowledge rule you are creating.

5. Optionally, in the Description field, type a short description for the auto-acknowledge rule.

6. If you want to send an auto-acknowledgement to all emails coming into the email account to which this rule is associated, click the **All Emails** box.

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

7. If you do not want auto-acknowledgements to go out to all emails, use the Key, Operator, and Value fields to specify the conditions when an auto-acknowledgement should be sent to an incoming email.
  1. From the list in the Key field, select a key for the auto-acknowledge rule you are creating.
  2. From the list in the Operator field, select an operator for the auto-acknowledge rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the auto-acknowledge rule you are creating.
8. Repeat step 7 for each condition you want to add to the rule.



9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

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

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

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

### Creating Auto-Processing Rules:

Auto-processing rules define the processing actions that are automatically performed on incoming emails. Such actions include creating and updating service requests, or executing custom procedures.

**Note:** You can also use auto-processing rules to automatically create service requests. Please refer to the Concepts chapter and the Auto-processing Rules section of the Implementation Tasks chapter of the *Oracle Email Center Implementation Guide* for detailed information about configuring the auto create service request feature.

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

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps

1. Click the **Administration** tab.

2. Click the **Rules Library** subtab.

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

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

The Create Auto-Processing Rule page appears.

4. In the Name field, type a name for the auto-processing rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-processing rule.
6. If you want the auto-processing rule to apply to all incoming emails, click the All Emails box.

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

7. If you want your auto-processing rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-processing rule should be applied to an incoming email.
  1. From the list in the Key field, select a key for the auto-processing rule you are creating.
  2. From the list in the Operator field, select an operator for the auto-processing rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the auto-processing rule you are creating.
8. Optionally, repeat steps 7 for each condition you want to add to the rule.
9. If you are adding multiple conditions to the rule, from the Rule Chaining list, select the operator which you want to use for the chaining of the rules you define. The field default value is **And**.

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

10. From the list in the Action field, select the action you would like your auto-processing rule to perform.
11. Select parameter values that depend on the action that you selected in step 10:
  1. If you selected Update Service Request as the action in the step above, then select a status code from the drop-down list available.
  2. If you selected Create Service Request as the action in the step above, then do the following:
    1. From the Email Parser list, optionally select a parser definition.  
If you do not select a parser definition, then the application creates a service request based on simpler rules that pass only customer information to it.
    2. From the Service Request Type list, select a type.
    3. From the Notification Template field, search for and select a template.
  3. If you selected Execute Custom Procedure/Workflow as the action in the step above, then enter the name of a valid predefined PL/SQL procedure.
12. If applicable, in the Notification Template field, search for and select a notification template.
13. Click **Create**.  
  
The Email Processing Rules page refreshes and the new auto-processing rule is displayed in the summary view table.

### **Creating Auto-Redirect Rules:**

Auto-redirect rules enable you to redirect the incoming email to another Oracle Email Center account or an external email address.

Use the following steps to create auto-redirect rules.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Rules Library** subtab.

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

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

The Create Auto-Redirect Rule page appears.

4. In the Name field, type a name for the auto-redirect rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-redirect rule.
6. From the Action list, select whether you want to redirect emails to an internal or external email account, and click **Go**.
7. If you want the auto-redirect rule to apply to all incoming emails, click the All Emails box.

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

8. If you want your auto-redirect rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-redirect rule should be applied to an incoming email.
  1. From the list in the Key field, select a key for the auto-redirect rule you are creating.
  2. From the list in the Operator field, select an operator for the auto-redirect rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the auto-redirect rule you are creating.
9. Optionally, repeat the previous step for each condition you want to add to the rule.

Be sure to select how you want the conditions joined together from the Rule Chaining list.
10. For redirects to external accounts:
  1. In the Email Address field, type the address to which you want to redirect incoming email.

2. From the Category list, select the template category containing the template to be used as the message body for the redirected email message.
  3. From the Template list, select the template you want to use as the message body for the redirected email message.
11. For redirects to internal accounts, from the Email Address list, select the account to which you want to redirect the message.
  12. Click **Create**.

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

### **Creating Auto-Reply Rules:**

Auto-reply rules allow you to determine whether you want to automatically reply to an incoming email using a specified document.

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

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.

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

The Create Auto-Reply Rule page appears.
4. In the Name field, type a name for the auto-reply rule you are creating.
5. Optionally, in the Description field, type a short description for the auto-reply rule.
6. If you want the auto-reply rule to apply to all incoming emails, click the All Emails box.

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

7. If you want your auto-reply rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the auto-reply rule should be applied to an incoming email.
  1. From the list in the Key field, select a key for the auto-reply rule you are creating.
  2. From the list in the Operator field, select an operator for the auto-reply rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the auto-reply rule you are creating.
8. In the Action area, use the Category, Document, and Insert/Attach fields to specify the category and document you want to include, as well as how the document should be included with the reply.
  1. From the list in the Category field, select the MES category that contains the document you want to use.
  2. From the list in the Document field, select the document you want to use for your auto-reply.
  3. From the list in the Insert/Attach field, select whether you want to insert the document into the body of the reply, or attach it to the reply.

**Note:** The order in which you select your documents will be the order in which they are inserted into or attached to the response.

9. Click **Create**.

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

### **Creating Document Retrieval Rules:**

Document retrieval rules allow you to determine whether you want the response document retrieval process to be based on matching keywords extracted from the incoming email to the keywords in documents stored in the Knowledge Base repositories, or based on a mapping of the incoming email to a specific category in

Marketing Encyclopedia System (MES).

Use the following steps to create a document retrieval rule.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### **Steps**

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.  
The Email Processing Rules page appears, displaying a summary view table of all email processing rule types.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Document Retrieval.  
The Create Document Retrieval Rule page appears.
4. In the Name field, type a name for the document retrieval rule you are creating.
5. Optionally, in the Description field, type a short description for the document retrieval rule.
6. From the Retrieval Method list, select the method by which you want to retrieve documents and click **Go**.
7. If you want the document retrieval rule to apply to all incoming emails, click the All Emails box.

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

8. If you want your document retrieval rule to apply based on specified criteria, use the Key, Operator, and Value fields to specify the conditions when the document retrieval rule should be applied to an incoming email.
  1. From the list in the Key field, select a key for the document retrieval rule you are creating.

2. From the list in the Operator field, select an operator for the document retrieval rule you are creating.
  3. From the list in the Value field, search for and select, or type a value for the document retrieval rule you are creating.
9. If you selected **Keyword Matching** as your retrieval method:
1. Select the repository you want to search.  
You can select to search MES, Knowledge Management, or both.
  2. Select to search all categories within the chosen repository, or search for and select individual categories within the chosen repository.
- Note:** The All Categories option refers ONLY to all MES categories. It does not apply to categories in the Knowledge Management system.
10. If you selected **MES Category Mapping** as your retrieval method:
1. Search for and select the appropriate MES Category.
  2. Click **Apply**.
11. Click **Create**.
- The Email Processing Rules page refreshes and the new document retrieval rule is displayed in the summary view table.

### **Creating Routing Rules:**

Routing rules allow you to designate rules for routing incoming emails to the original agent, or a specified group of agents.

To ensure that every email is processed, by default an email will get routed to all agents assigned to that email account if:

- The administrator does not associate any routing rule to that email account OR
- All the routing rules assigned to that account fail.

Use the following steps to create a routing rule.

#### **Login**

HTML Login URL

#### **Responsibility**



### Prerequisites

none

### Steps

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.  
The Email Processing Rules page appears.
3. In the Add/Delete column, click the add icon (plus sign) corresponding to Routing.  
The Create Route page appears.
4. In the Name field, type the name of the route you are creating.
5. In the Description field, type a short description for the route you are creating.
6. From the Route Type list, select the route type, and click **Go**.
7. If you selected **Static**, the Create Route page refreshes to display a rules creation area with fields for designating the key, operator and value for each rule you create.
  1. If you are going to utilize multiple rules, from the Rule Chaining list, select how you want those rules joined together.  
For any route, all rules can be chained using either AND or OR, but not both.
  2. From the list in the Key field, select a key for the routing rule you are creating.
  3. From the list in the Operator field, select an operator for the routing rule you are creating.
  4. From the list in the Value field, search for and select, or type a value for the routing rule you are creating.
  5. If you want the routing rule to apply to all emails, select the All Emails option.
8. If you selected **Dynamic**, the Create Route page refreshes to display a procedure area where you can define the procedure name and variables you want to use.

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

1. In the Procedure Name field, type a name for the procedure you will use for your dynamic route.
  2. In the list in the OUT Parameter Type field, select the data type you want to use for your route.
  3. From the list in the Operator field, select an operator for the routing rule you are creating.
  4. From the list in the Value field, search for and select, or type a value for the routing rule you are creating.
9. Click **Create**.

The routing rule is created and appears in the summary view table under Routing on the Email Processing Rules page.

To update an existing route, click the route name hyperlink in the Email Processing Rules by Type column. The Update Route page appears, allowing you to update the description, the static rule keys, operators and values, or the procedure details.

To remove a route, click the delete icon (trash can) in the Add/Delete column for the routing rule you want to remove.

### **Modifying Processing Rules:**

Use the following steps to modify a processing rule in Email Center.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Rules Library** subtab.  
The Email Processing Rules page appears.
3. In the Email Processing Rules by Type column, click the expand icon for the rule type containing the rule you want to modify.  
The summary view table refreshes to display all existing rules for the selected type.

4. In the Email Processing Rules by Type column, click the rule name for the specific rule you want to modify.

The Update page appears for the selected rule.

5. Modify the information in the provided fields as appropriate.

6. Click **Update**.

The modifications to the selected rule are saved.

### **Deleting Processing Rules:**

Use the following steps to delete a processing rule in Email Center.

**Note:** Deleting a rule will automatically remove any associations to email accounts that rule may have.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Rules Library** subtab.

The Email Processing Rules page appears.

3. In the Email Processing Rules by Type column, click the expand icon for the rule type containing the rule you want to delete.

The summary view table refreshes to display all existing rules for the selected type.

4. In the Add/Delete column, click the trash can icon for the rule you want to delete.

The selected rule is deleted and you receive a confirmation note stating that the rule has been deleted successfully.

## **Intents**

The Intent pages allows you to turn intent processing on or off for each account, and view the existing intents for each account.

Oracle Email Center utilizes strings of keywords extracted from incoming emails to decipher the intent of the email message or the broad area pertaining to the email and assists the agent in the selection of appropriate responses.

The keywords extracted from every incoming email are matched with keywords stored in the Email Center schema to identify the intent of the email and fetch corresponding responses. Every intent and suggested response document is assigned a score (percentage) based on the scores of the keywords identified in the incoming email. Oracle Email Center can identify multiple intents in an email and multiple responses for each intent, thereby enabling Email Center Agent to handle multi-issue emails in a single response.

To enable the Email Center Intent engine, you must create "intents" pertaining to the business. You should gather sample question and response emails for each of the intents. To train or build the intent engine, you then simply send the sample emails to the "intent" account.

Keywords are extracted from these sample messages, scored and stored in the Email Center schema for the specified intent. The scoring of important keywords has been improved such that keywords that are unique to an intent and occur most frequently will be assigned the highest scores. Equally, if a keyword appears across multiple intents or is not used frequently, will have a lower score.

**Intent creation tips:**

Think about the key words that you want to be associated with the Intent:

- Consider the variations on these words/phrases that customers may use.
- Consider the words or phrases that distinguishes one intent from another.
- Avoid including signature files in the sample question and response emails as the contents will be processed and Keywords that are irrelevant to the Intent may be generated.
- Do not "forward" sample emails and sample responses to the Intent account.
- Avoid Company names, logos, acronyms, etc. in the sample question and response emails.
- Do not include Greetings (e.g. Dear Sir) and Signatures (e.g. Best Regards, Joe Smith) in the sample question and response emails.
- Do not include specific codes or numbers, for example: product codes, sizes, telephone numbers, order numbers unless they uniquely identify an intent.
- Send multiple versions of the sample question and response emails repeating the important keywords and phrases. This will enable the system to increase the scores of the keywords.

- Try to create multiple intent with smaller sets of keywords as compared to creating only a few intents with a large number of keywords.

## **Creating Intents:**

### **Intent Creation Tips:**

- Consider the variations on these words/phrases that customers may use.
- Consider the words or phrases that distinguishes one intent from another.
- Do not include specific codes or numbers, for example: product codes, sizes, telephone numbers, order numbers unless they uniquely identify an intent.
- The intent name can be up to 50 characters long. It can consist of multiple words separated by a blank space.
- Intents should be mutually exclusive and should encompass the complete spectrum of questions that an organization expects to receive.

Use the steps below to create an Intent.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### **Steps**

1. Click the **Administration** tab.
2. Click the **Intents** subtab.  
The Intent Summary page appears, displaying a summary list of all created intents.
3. Click **Create**.
4. In the Intent Name field, type a name for the intent you are creating.
5. From the list in the Language field, select the language you want to use.
6. If you selected **English** as your language, you have the option of enabling theming. To do so, select the Enable Theming box.
7. In the Keyword Text for Questions field, type a list of question keywords or pieces of text that contain the desired keywords. Remember to separate the entries with a

comma (,) or a space.

These are the keywords you would like to match against keywords extracted from incoming email.

8. In the Keyword Text for Responses, type a list of question keywords or pieces of text that contain the desired keywords. Remember to separate the entries with a comma (,) or a space.

These are the keywords you would like to use to find related documents from the knowledge base repositories.

9. Click **Continue**.

The Review Keywords page appears, displaying a list of the keywords you entered.

10. From the list in the Question Type Keywords area, assign each keyword an appropriate weight by selecting a number for the Weight list.

11. From the list in the Response Type Keywords area, assign each keyword an appropriate weight by selecting a number for the Weight list.

12. Click **Finish**.

The Intent Summary page appears and your new intent is added to the summary list.

13. You can click the icon in the View Documents column to see which documents your intent pulls from either MES or the Knowledge Base repository.

If your intent is not pulling the correct documents or not pulling them in the desired order, you can adjust each keyword's weight to get the result you want, or you can add or remove keywords from your intent.

### **Changing The Weight of Keywords in an Intent:**

Use the steps below to alter the weight of the keywords in an Intent.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The intent must already exist.

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Update column of the summary table, click the Update icon corresponding to the intent you want to alter.

The Update Intent Keywords page appears.

4. In the weight field for each keyword, adjust the weight number.

You can adjust the weight number for both question type and response type keywords.

5. Click **Finish**.

The Intent Summary page appears.

6. You can click the icon in the View Documents column to see which documents your intent pulls from either MES or the Knowledge Base repository.

If your intent is not pulling the correct documents or not pulling them in the desired order, you can re-adjust each keyword's weight to get the result you want, or you can add or remove keywords from your intent.

### **Adding Keywords to an Intent:**

Use the steps below to add keywords to an existing intent.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The intent must already exist.

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Update column of the summary table, click the Update icon corresponding to the intent you want to alter.

The Update Intent Keywords page appears.

4. Click **Add Keywords**.

The Add Keywords page appears.

5. Type the additional question and response keywords in the provided fields.

Remember to separate the entries with a comma (,) or a space.

6. Click **Continue**.

The Review Keywords page appears, displaying a list of the keywords you entered.

7. Assign each a weight to each of your question and response keywords.

8. Click **Finish**.

The Intent Summary page appears.

9. You can click the icon in the View Documents column to see which documents your intent pulls from either MES or the Knowledge Base repository.

If your intent is not pulling the correct documents or not pulling them in the desired order, you can adjust each keyword's weight to get the result you want, or you can add or remove keywords from your intent.

### **Removing Keywords From an Intent:**

Use the steps below to remove keywords from an intent.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Update column of the summary table, click the **Update** icon corresponding to the intent from which you want to remove keywords.

The Update Intent Keywords page appears.

4. In the Select column, click the box for the keywords you want to remove.

5. Click **Delete**.



The selected keywords are removed from the intent.

### **Duplicating an Intent:**

Use the steps below to duplicate an intent.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The intent must already exist.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Intents** subtab.  
The Intent Summary page appears, displaying a summary list of all created intents.
3. In the Select column of the summary table, click the box corresponding to the intent you want to duplicate.
4. Click **Duplicate**.  
The Create Duplicate Intent page appears.
5. In the Intent Name field, type a name for the duplicate intent.
6. If you want to add additional keywords, click **Add Keywords**.  
The Add Keywords page appears.
7. Type the additional question and response keywords in the provided fields.  
Remember to separate the entries with a comma (,) or a space.
8. Click **Continue**.  
The Review Keywords page appears, displaying a list of the keywords you entered.
9. Assign each question and response keyword a weight.
10. Click **Finish**.  
The Intent Summary page appears.
11. You can click the icon in the View Documents column to see which documents your intent pulls from either MES or the Knowledge Base repository.

If your intent is not pulling the correct documents or not pulling them in the desired order, you can adjust each keyword's weight to get the result you want, or you can add or remove keywords from your intent.

### **Deleting Intents:**

Use the steps below to delete intents.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.

2. Click the **Intents** subtab.

The Intent Summary page appears, displaying a summary list of all created intents.

3. In the Delete column of the summary table, click the Delete icon corresponding to the intent you want to delete.

You receive a warning asking if you are sure you want to delete the selected intent.

**Note:** Before you can delete an intent, you must remove it's association to all email accounts.

4. Click **Yes**.

The selected intent is deleted.

## **Email Parser**

Oracle Email Center can parse an inbound email for data elements contained within user-defined tags. The information captured from the inbound email can then be used to populate service request fields when a service request is automatically created from this inbound email using an auto-processing rule. With the Email Parser Definition page, administrators can define the tags and the data associated with them. For an email, the application maps data between the start and end tags to the corresponding service request field indicated in a specific line item. Later, using the Create Auto-Processing Rule page, they can associate the definition with an auto-processing rule.

The following table shows the service request fields. (This document adds the Subfield column to meet legal requirements.)

<b>Subfield</b>	<b>Field</b>	<b>Description</b>
Customer Attributes:	Service Request Type	Service Request Type
Customer Attributes:	Urgency	Urgency of the SR
Customer Attributes:	Account Number	Account Number
Customer Attributes:	Customer Number	Customer Number
Customer Attributes:	Customer Name	Name of the customer
Customer Attributes:	Customer Phone	Phone number of the customer
Customer Attributes:	Customer Email	Email address of the customer
Contact Attributes:	Contact Number	Contact Number
Contact Attributes:	Contact Name	Name of the Contact
Contact Attributes:	Contact Phone	Phone number of the Contact
Contact Attributes:	Contact Email	Email address of the Contact
Contact Attributes:	Instance Number	Instance Number
Contact Attributes:	Instance Serial Number	Serial Number for the Instance
Contact Attributes:	External Reference for an Item	External Reference number for an Item
Inventory Attributes:	Inventory Item number	Number of the Inventory Item
Inventory Attributes:	Tag Number	Tag Number
Inventory Attributes:	Serial Number	Serial Number

Subfield	Field	Description
Problem Code and Resolution Code Attributes:	Problem Code	Problem Code
Incident Address Attributes:	Addressee	Addressee information
Incident Address Attributes:	Incident Site Number	Site number pertaining to that incident
Incident Address Attributes:	Site Name	Name of the Site
Incident Address Attributes:	Incident Address1	Line 1 of Incident Address
Incident Address Attributes:	Incident Address2	Line 2 of Incident Address
Incident Address Attributes:	Incident Address3	Line 3 of Incident Address
Incident Address Attributes:	Incident Address4	Line 4 of Incident Address
Incident Address Attributes:	Incident City	Incident City
Incident Address Attributes:	Incident State	Incident State
Incident Address Attributes:	Incident Country	Incident Country
Incident Address Attributes:	Incident Province	Incident Province
Incident Address Attributes:	Incident Postal Code	Incident Postal Code
Incident Address Attributes:	Incident County	Incident County

### Example

Here is an example of the broad process of email parsing.

### Setup

The administrator creates a new Email Parser definition with the below entries.

### Structured Email

The structured email contains the following tagged text:

- Instance Number:[ 121223]
- Customer Number:[32222]

- AccountNumber:[ 1608 ]

### Action

The Email Parser definition is associated with a Create Service Request auto-processing rule. The Email Parser extracts the below data and maps it to the following service request fields:

- 121223 > Instance Number
- 32222 > Customer Number
- 1608 > Account Number

Subsequently, as part of the Create Service Request auto-processing rule, the data that the Inbound Parser definition has captured, such as Instance Number, Customer Number, and Account Number in the example is passed to the service request that the applications is creating from the inbound email.

In this example, the resulting service request that is created from this inbound email has the Instance number pre-populated with the 121233, the Customer Number field pre-populated with the value '32222', and the Account Number field pre-populated with the value '1608'.

In the case where there is carriage return within the data being captured, the integrity of the carriage return is maintained. As an example:

```
SR Field: Problem Description
Start Tag: Problem Description (
End Tag:)
```

```
And we get the following email:
Problem Description(Line 1
Line 2
Line 3)
```

```
The captured data will be:
Line 1 <cr>
```

### Creating Email Parser Definitions:

Use the following steps to create an email parser definition.

#### Login

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

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

## Steps

1. Click the **Administration** tab.
2. Click the **Email Parser** subtab.  
The Email Parser Definition page appears, displaying all the email parser definitions that have been created within the system.
3. Click **Create**.  
The Email Parser Definition page refreshes itself so that you can create a new definition.
4. In the Email Parser Name field, type the name of the definition.
5. Optionally, in the Description field, type the details of the inbound parser definition.
6. In the Service Request field, use the associated list to select and enter a service request field name.
7. In the Start Tag and End Tag fields, enter the start and end tags that map an email field to the associated value of Service Request Field.
8. In the Rank field, type a number to indicate the relative importance of this field compared to the other fields defined in the parser definition. The lowest number indicates the highest priority.
9. Click **Save**.

## Tags

A "tag" is a data item that is appended to an outbound email by Oracle Email Center. The process of appending a sequence of one or more "tags" to an outbound email and extracting the same from an incoming email is referred to as "tagging". A unique identifier is assigned to the sequence of tags appended to every email.

A tag can be of two of types:

**System Tags** - This consists of the following system related data items that are appended to every outbound email:

- Customer ID and Contact ID - Used to automatically identify the customer and contact sending the email
- Agent ID - Used to automatically route the customer reply back to the same agent
- Interaction ID - Used to thread or link related email interactions

- Service Request Number - Used to automatically update the Service Request

**Custom Tags** - An administrator can also define "custom" tags pertaining to the implementation. These custom tags could be of the following types:

- Fixed - The value for the tag is provided by the administrator at the time of creation
- Query - The value of the tag is obtained by executing the associated SQL query at runtime
- Procedure - The value of the tag is obtained by executing the associated PL/SQL procedure at runtime

A "custom" tag is not appended to an outbound email unless and until the customer tag is associated with the email account from which the email is sent out.

Email Center currently appends the cryptic tagging ID at the end of the subject enclosed within "[RE: ]". When a customer replies back to an email generated by Email Center, the tags are extracted from the incoming email and the data is used for various automated processing actions (as detailed above for the "system" tags). The tags are also made available as "keys" for defining email processing rules.

For more information on tags, see the Tags , page 1-34topic in the Concepts section.

### **Creating Tags:**

Use the steps below to create tags for Email Center.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Tags** subtab.  
The Tags page appears.
3. Click **Create**.  
The Create Tag page appears.
4. Enter values for:

- **Tag ID** - Any combination of alphanumeric characters a-z and A-Z, up to 26 characters in length.
- **Tag Name** - Any combination of alphanumeric characters other than double quote ("), less than (<) and greater than (>), up to 50 characters in length.
- **Type** - Select **Fixed**, **Procedure**, or **Query** from the list.
- **Value** - The value depends on the type selected above.

For Fixed type tags any alphanumeric character up to 256 characters is allowed.

For Procedure type tags a valid procedure name should be entered in the "package\_name.procedure\_name" format.

For Query type tags, a valid query should be entered without a semi-colon (;) or a slash (/) at the end.

5. Click **Create**.

The Account Association page appears. Follow the steps in the Associating Tags With Email Accounts, page 5-31 topic to associate this new tag with various email accounts.

## Updating Tags:

Use the steps below to update tags.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

none

### Steps

1. Click the **Administration** tab.
2. Click the **Tags** subtab.  
The Tags page appears.
3. In the Name column, click the hyperlinked name of the tag you wish to update.  
The tag details (ID, Name, Type, and Value fields) are displayed on Update Tag page.
4. Update the Tag Name, Type or Value fields as necessary.



5. Click **Update** to save changes or **Restore** to undo the changes.

### **Deleting Tags:**

Use the steps below to delete tags.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

The tag to be deleted should NOT be associated with any email accounts.

#### **Steps**

1. Click the **Administration** tab.
2. Click the **Tags** subtab.  
The Tags page appears.
3. Check the boxes corresponding to the tags you want to delete.

**Note:** If you realize you have clicked unwanted boxes, you can click **Restore** to uncheck all boxes. However, the Restore button does not rollback the delete operation. In other words the deleted tags cannot be undeleted by clicking **Restore**.

4. Click **Delete** to delete the selected tags.

**Note:** A custom tag can only be deleted if it is not associated with any email accounts.

## **Purge**

You can use this page to periodically purge email messages. Purging permanently deletes the email messages which match the criteria of the purge request.

### **Viewing Existing Requests:**

Use the steps below to view all existing purge requests.

#### **Login**

HTML Login URL

**Responsibility**

Email Center Administrator

**Prerequisites**

none

**Steps**

1. Click the **Administration** tab.
2. Click the **Purge** subtab.

The Purge Summary page appears, displaying a list of all pending and successful requests.

**Creating a Purge Request:**

Use the steps below to submit a purge request.

**Login**

HTML Login URL

**Responsibility**

Email Center Administrator

**Prerequisites**

none

**Steps**

1. Click the **Administration** tab.
2. Click the **Purge** subtab.
3. Click **Submit New Request**.

The Submit New Request page appears.

4. From the Account list, select the email account containing the emails you want to purge.

**Note:** You can select an individual email account or select to purge emails from ALL email accounts.

5. From the Folder list, select the folder containing the emails you want to purge.

**Important:** Although the UI page shows the word "older" there are no system folders in Email Center Release 12. In this release,

"folder" refers to the "type" the email. "Deleted" refers to incoming email that were deleted. "Resolved" refers to incoming email that were responded to, and "Sent" refers to copies of outgoing email messages.

**Note:** You can select an individual system folder or select to purge emails from ALL system folders.

6. In the Before This Date field, use the date picker (calendar icon) to select the cut off date for your purge.

This is the date past which email will not be included in your purge. All emails up to the selected date will be included in the purge.

7. Click **Go**.

The Purging page refreshes to display the selected email account(s) and folder(s).

8. From the Select column, select the box(es) for the folder(s) you want to purge.

9. Click **Purge**.

The Purge Confirmation page appears asking you if you are sure you want to purge emails from the selected account(s) and folder(s).

10. Click **Apply**.

The Purging Requests page appears, displaying a confirmation that your request has been successfully submitted.

**Note:** To complete this the process, you must ensure the Email Center Purging concurrent program is scheduled to process archiving and purging requests.

### **Canceling a Request:**

Use the steps below to cancel a submitted request.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

### Steps

1. Click the **Administration** tab.

2. Click the **Purge** subtab.

The Purging Summary page appears, displaying a list of all pending requests and all successful requests.

3. From the Select column in the Pending Requests area, select the purge request you want to cancel.

4. Click **Cancel**.

The selected request is canceled.

## Documents

Oracle Email Center uses the Marketing Encyclopedia System (MES) as its document repository. MES provides the administrator with the capability to organize documents into various categories (or folders).

### Searching for MES Documents:

Use the steps below to search for a particular MES document.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator or Email Center Supervisor

#### Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES..

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Search**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Search**.

The Knowledge Base Search page appears.

2. In the Document Search Criteria field, type the name or partial name with a wildcard (%).

3. Click **Search**.

The Document Search Results table refreshed to display the results of the search.

4. To view a specific document, in the Title column, click the document title hyperlink.

### **Browsing the MES Document Categories:**

Use the steps below to browse the MES categories for a particular document.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator or Email Center Supervisor

#### **Prerequisites**

You should have the MES Administrator role assigned and the document must already be published to MES..

#### **Steps**

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Browse**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Browse**.  
The Browse Documents page appears.
2. In the MES Category column, click the expansion icon to view sub-categories under a particular MES category (if applicable).  
The summary view table expands to show the sub-categories for the selected MES category.
3. In the View column, click the appropriate icon to view the documents in a particular MES category or sub-category.
4. To view a specific document, in the Title column, click the document title hyperlink.

### **Updating MES Documents:**

Use the steps below to update MES documents.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator or Email Center Supervisor

#### **Prerequisites**

You should have the MES Administrator role assigned and the document must already be published to MES..

You can only update documents that you published. You cannot update documents

that have been published by other user names.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base**.  
The Browse Documents page appears.
2. Search or browse for the document you want to update by clicking **Search** or clicking **Browse** from the side panel, and locating the document you want to update.
3. In the Update column, click the update icon (pencil) for the document you want to update.  
The Publish Document page appears.
4. Update the document title, description, category, or upload a new file as necessary.
5. Click **Update**.  
The Publish Document page refreshes to display a confirmation message stating that the document was updated.

### Deleting Published Documents:

Use the steps below to remove a MES document you published.

**Note:** You can only delete documents that you published. You cannot delete documents that have been published by other user names.

### Login

HTML Login URL

### Responsibility

Email Center Administrator or Email Center Supervisor

### Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Browse**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Browse**.
2. In the View column, click the View icon for the desired MES category.

The Browse Documents page refreshes to display all the documents in the selected MES category.

3. In the Select column of the table, select the box for the document you want to remove.

4. Click **Remove**.

The page refreshes to display a confirmation message stating that the selected document was deleted.

## **Creating and Publishing Documents:**

Use the steps below to create and publish a document for MES by using the template editor.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator or Email Center Supervisor

### **Prerequisites**

You should have the MES Administrator role assigned and MES categories must be created.

If you are going to use a custom merge field, then you must have first created and named that custom merge field on the Create Query page.

### **Steps**

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Editor**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Editor**.

The Create Document page appears.

2. In the Title field, type a name for your document.
3. In the Description field, provide a short description of the document.
4. In the Category field, search for and select the appropriate MES category in which you want to create your document.
5. In the Query Name field, you can search for and associate a query to the document.
6. Use the provided fields to select the type of merge field you want to use:
  1. If you want to use a standard merge field, from the Standard Merge Field list, select the option you want to use, and click **Insert**.

2. If you want to use a custom merge field, type the name of the custom merge field in the Custom Merge Field field, and click **Insert**.

You can click the **Required** box to make your merge field required.

7. Click the hypertext link above the Template Body field to switch from plain text mode to rich text mode.

Rich text mode allows you to format the font of the email, and include an image or hyperlink in the email.

8. In the Template Body field, type the desired document content. Optionally, you can include the following in the document's content:

- One or more standard merge fields by selecting a value from the Standard Merge Field list and clicking **Insert**.
- One or more custom merge fields by entering a value in the Custom Merge Field text field and clicking **Insert**.

9. Click the **Spell Check** hyperlink to check the spelling of your template body text.

10. To preview the document before you publish it, click **Preview**.

11. Click **Publish**.

A conformation message appears, stating that you successfully published the document.

## Uploading and Publishing Documents:

Use the steps below to import and publish a document for MES.

### Login

HTML Login URL

### Responsibility

Email Center Administrator or Email Center Supervisor

### Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Publish**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Publish**.

The Publish Document page appears.



2. In the Title field, type a title for the document you are going to upload.
3. In the Description field, provide a short description of the document.
4. In the Category field, search for and select the appropriate MES category for your document.
5. Click **Upload File**.  
The Upload File browse box appears.
6. In the Upload File browse box, click **Browse**, search for and select the file you want to upload.
7. Click **Upload**.  
The Publish Document page refreshes and the selected file appears in the Files field.
8. Click **Publish**.  
A confirmation message is displayed, stating that the new document has been published.

**Note:** If the documents loaded into MES will be used as suggested responses, a concurrent process needs to be run in order to rebuild the Oracle Text index for MES. You must submit a request to run the Rebuild Help Search Index concurrent process (refer to the Business Data Checkpoint section).

## Creating Categories in MES:

Use the steps below to add new MES categories.

### Login

HTML Login URL

### Responsibility

Email Center Administrator or Email Center Supervisor

### Prerequisites

You must have assigned a MES Administrator resource role.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Categories**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Categories**.  
The Category Manager page appears.

2. If no blank rows are available, click **Add Row(s)** and, when prompted, type the number of new rows you want to add and click **OK**.
3. In the provided fields, type the name of the new category, a description of it, and select its parent category.
4. Click **Update**.

### Guidelines

Read the content of the latest Oracle Email Center About Doc for important information about new features, post installation steps and other changes introduced with the release.

### Defining a Hierarchy Among the Categories:

Use the steps below to create a hierarchy of MES categories.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator or Email Center Supervisor

#### Prerequisites

You must have assigned a MES Administrator resource role.

#### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Documents > Categories**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Categories**.  
The Category Manager page appears, displaying a list of categories.
2. In the Category Name column find the category that you want to become the sub-category.
3. From the list in the Parent Category column for that row, select the desired parent category.
4. Click **Update**.

## Queries

Use the Queries subtab to set up and maintain queries.

## Viewing Queries:

Use this procedure to view an existing query.

### Login

HTML Login URL

### Responsibility

Email Center Administrator or Email Center Supervisor

### Prerequisites

You must be assigned the JTF\_FM\_ADMIN role to create queries.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Queries > List**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Query > List**.  
The Query List page appears.
2. You can use the Query Name search feature to narrow down the list of queries. Type the full name or partial name with a wildcard (%) of the query you want to view and click **Go**.
3. In the Query Title column, click the query name hyperlink of the query you want to view.  
The Query Details page appears.
4. Click **Back** when you have finished viewing the selected query.

## Creating Queries:

Use this procedure to create a query.

### Login

HTML Login URL

### Responsibility

Email Center Administrator or Email Center Supervisor

### Prerequisites

You must be assigned the JTF\_FM\_ADMIN role to create queries.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Queries > Create**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Query > Create**.

The Create Query page appears.

2. In the Query Title field, type a unique name for the query that you want to create.
3. In the Query Description field, type any free-form text that you want to use to describe the query that you are creating.
4. In the Query String field, type the SELECT statement for the query.

**Note:** The alias for each column used in the SELECT statement must match the merge field name and must be enclosed within the valid merge field delimiters. To assist in this process, Email Center allows you to insert SQL merge fields. Do not end the query with a semicolon (;) or slash (/).

For example, if the document had following merge fields:

Dear ((\*FIRST\_NAME\*)) ((\*LAST\_NAME\*)),

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

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

```
SELECT CUSTOMER_FIRST_NAME "((*FIRST_NAME*))",
```

```
CUSTOMER_LAST_NAME "((*LAST_NAME*)) ",
```

```
PRODUCT_NAME "((*PRODUCT*)) ",
```

```
RELEASE_DATE "((*DATE*)) "
```

```
FROM ...
```

```
WHERE ...
```

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

5. In the SQL Merge Field field, type the name of the merge field and click **Insert**.

An alias name for the column that matches the merge field is inserted at the end of the text in the Query String Editor.

**Note:** When typing a SQL merge field, you must use all capital letters. While no white spaces are allowed, you can use numerals and underscores (\_).

**Note:** Since the functionality to insert merge fields cannot recognize the current cursor position in the Query String editor, the merge field always gets inserted at the end of the statement. Therefore, Oracle recommends that you insert the merge fields immediately after typing the corresponding column name.

When the user selects a document that includes SQL merge fields, he/she will be prompted to enter values for the bind variables entered in the WHERE clause unless the bind variable is a "standard" merge field itself. In such a case the bind variable will be populated automatically. The SQL query will be executed using the value for the bind variable when the associated document is previewed, inserted or attached.

6. Click **Validate SQL**.

You will be prompted to enter a value for the bind variables used in the query.

7. Enter a random numeric or varchar value (depending on the data type of the corresponding column) for the bind variable, and click **Validate SQL**.

You receive a confirmation messages stating that the validation was successful and the prompt you created in the Query String field is added.

8. If you want to save your work and create the query, click **Create**.

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

## Removing Queries:

Use this procedure to remove an existing query.

### Login

HTML Login URL

### Responsibility

Email Center Administrator or Email Center Supervisor

### Prerequisites

You can only remove queries that you created.

### Steps

1. If you are logging in with the Email Center Administrator responsibility, click **Knowledge Base > Queries > List**. If you are logging in with the Email Center Supervisor responsibility, click **Supervisor > Knowledge Base > Query > List**.

The Query List page appears.

2. In the Select column, click the box corresponding to the query you want to remove.
3. Click **Remove**.

The Query List page refreshes and the selected query is removed.

## Custom Dictionary

You can use the Custom Dictionary page to add words that are specific to your company or business, such as: company name, address, product names, common acronyms, etc. You can also use this page to remove words from the custom dictionary.

### Tasks

You can perform the following tasks:

- Adding Words to the Custom Dictionary, page 5-76
- Removing Words From the Custom Dictionary, page 5-77

#### **Adding Words to the Custom Dictionary:**

Use the steps below to add words to your custom dictionary.

##### **Login**

HTML Login URL

##### **Responsibility**

Email Center Administrator

##### **Prerequisites**

none

##### **Steps**

1. Click the **Administration** tab.
2. Click **Custom Dictionary** subtab.  
The Custom Dictionary page appears.
3. In the Add Words field, type the word(s) you want to add to the custom dictionary.

**Note:** If you are typing multiple words to be entered, each word must be separated by a comma.

4. Click **Add**.

The Custom Dictionary page refreshes to add the words to the dictionary.

### Removing Words From the Custom Dictionary :

Use the steps below to remove words from your custom dictionary.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps

1. Click the **Administration** subtab.
2. Click **Custom Dictionary** subtab.  
The Custom Dictionary page appears.
3. In the Remove Words field, select the word(s) you want to remove from the custom dictionary.

**Note:** You can select more than one word by using the Shift or Ctrl keys in conjunction with your left mouse button.

4. Click **Remove**.

The Custom Dictionary page refreshes to remove the selected words from the custom dictionary.

## Resource Groups

Resource groups allow the assignment of multiple agents to an account without having to assign each agent individually.

The Email Center Administration console allows you to create resource groups, add agents to the resource groups, and search for resource groups by a variety of parameters.

## Tasks

You can perform the following tasks:

- Viewing Resource Groups, page 5-78

- Creating Resource Groups and Assigning Agents to Them, page 5-78
- Removing Resource Groups, page 5-79
- Removing Agents From a Resource Group, page 5-80
- Searching for Resource Groups, page 5-81

### **Viewing Resource Groups:**

You can use the Email Center Administration console to view all existing resource groups that have the Call Center usage assigned to them.

Use the following steps to view resource groups.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Resource Groups** tab.

The Groups page appears, displaying a summary view table of all existing resource groups to which the Call Center group usage has been assigned.

2. If you do not see the group you want, you can use the Group Name search feature to locate it.

3. If you want to view the details of a particular resource group, in the Group Name column, click the hyperlinked name of the resource group you want to view.

The Group Detail page appears for the selected resource group, displaying all of the group usages and agents assigned to that group.

### **Creating Resource Groups and Assigning Agents to Them:**

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

Resource groups allow the assignment of multiple agents to an account without having to assign each agent individually.

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

#### **Login**

HTML Login URL



## Responsibility

Email Center Administrator

## Prerequisites

Ensure Email Center agents have been created.

## Steps

1. Click the **Resource Groups** tab.  
The Groups page appears.
2. In the Groups page, click **Create**.  
The Create Group page appears.
3. In the Name field, type a name for the resource group you are creating.
4. In the Active From, use the calendar tool to select a start date for your resource group.
5. From the list in the Application Areas field under the Used In area, select **Call Center** as the group usage.  
You can assign multiple usages to the group, but the **Call Center** usage **MUST** be assigned.
6. In the Members area, click **Add Members**.
7. Search for and select the name of the agent you want to assign to the resource group.
8. In the Role Name field, type one of the following roles:
  - **Email Center Manager**
  - **Email Center Supervisor**
  - **Email Center Agent**
9. Repeat steps 6 - 8 for each agent you want to assign to the resource group.
10. Click **Apply**  
The resource group is created and the selected agents are assigned to it.

## Removing Resource Groups:

Use the following steps to remove a resource group.

**Note:** While you cannot "remove" a resource group, you can use the end date feature to prevent the resource group from being active.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

Ensure Email Center agents have been created.

### Steps

1. Click the **Resource Groups** tab.

The Groups page appears, displaying a summary view table of all existing resource groups to which the Call Center group usage has been assigned.

2. If you do not see the group you want, you can use the Group Name search feature to locate it.

3. In the Update column, click the update icon for the resource group you want to remove.

The Update Group page appears.

4. In the Active To field for the resource group, use the calendar tool to select an appropriate end date.

5. Click **Apply**.

The resource group will no longer be active once the selected end date occurs.

### Removing Agents From a Resource Group:

Use the following steps to remove a resource group.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

none

### Steps

1. Click the **Resource Groups** tab.

The Groups page appears, displaying a summary view table of all existing resource groups to which the Call Center group usage has been assigned.

2. If you do not see the group you want, you can use the Group Name search feature to locate it.
3. In the Update column, click the update icon for the resource group from which you want to remove agents.

The Update Group page appears.

4. In the Remove column of the Members area, click the remove icon for each agent you want to remove from the resource group.

5. Click **Apply**.

The selected agents are removed from the resource group.

### **Searching for Resource Groups:**

Use the following steps to search for a resource group.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Resource Groups** tab.
2. To perform a simple search, in the Group Name field, type the name of the resource group you want to find, and click **Go**.
3. If you want to perform a more detailed search, click **Advanced Search**.  
The Advanced Search page appears.
4. You can use any of the provided fields as filter criteria for your search.

**Note:** The more narrow or complete your search criteria is, the fewer and more accurate your results will be.

5. Click **Go**.

The Groups page appears, displaying the results of your search.

## Download Processor

The Download Processor polls the Inbox folder of "active" email accounts for new incoming emails and copies the new inbound emails into the Local Message Store. The Download Processor will only check for new emails in the inbox of "active" accounts on the mail server.

### Viewing the Download Processor Status:

Use the steps below to view the download processor status for an email account.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps

1. Click the **Monitoring** tab.
2. Click the **Download Processor** subtab.  
The Download Processor page appears, displaying a list of Email Center email accounts.
3. In the Processor Status column for the desired email account, verify the status of the download processor.

### Viewing Error Details:

Use the steps below to view download processor error details for an email account.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

### Steps

1. Click the **Monitoring** tab.
2. Click the **Download Processor** subtab.  
The Download Processor page appears, displaying a list of Email Center email accounts.
3. In the Error Details column, click the error detail icon for the desired email account  
The Error Details page appears, displaying all the error details for the selected email account.

### Deleting Error Details:

Use the steps below to delete error details from an email account.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

### Steps

1. Click the **Monitoring** tab.
2. Click the **Download Processor** subtab.  
The Download Processor page appears, displaying a list of Email Center email accounts.
3. In the Error Details column, click the icon for the desired email account  
The Error Details page appears, displaying all the error details for the selected email account.
4. In the Select column, click the box for each error detail you want to delete. If you want to delete all error details, click **Select All**.
5. Click **Delete**.

## Outbox Processor

The outbox processing console provides you with a means of viewing a summary of outbox processor activity, viewing the current outbox processor status, viewing emails

that are "stuck" in the outbox, reprocessing stuck email messages, or purging stuck emails from the system.

### **Viewing a Summary of Outbox Processor Activity:**

The Summary page displays the two processing queues that comprise the outbox processor:

- New Items
- Errored Items

For each queue, administrators can see how many items of each processing type are in queue. Administrators can then use this information to determine if there are any items that have errored out or to determine where the backlog of messages is located.

Use the following steps to view a summary of your outbox processor activity.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Monitoring** tab.
2. Click the **Outbox Processor** subtab.

The Outbox Summary page appears, displaying a summary view table of activity by processing type (sent, deleted, transferred, etc.).

### **Viewing the Current Outbox Processor Status:**

The Status page displays current run-time JVM (Java Virtual Machine) information. For each Controller running (one per JVM), you can see the Workers that are processing each of the queues. The Controller is responsible for starting and stopping the Workers and is tied to the running server host and port, Jserv ID and Jserv port. The Last Updated timestamp indicates the last time this object updated the database. A running count of messages that were processed by each worker is maintained for the life of the worker

Use the following steps to view the current status of your outbox processor activity.

#### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### **Steps**

1. Click the **Monitoring** tab.
2. Click the **Outbox Processor** subtab.  
The Outbox Summary page appears, displaying a summary view table.
3. From the side panel, click **Status**.  
The Outbox Processor Status page appears
4. Use the summary table to view the current Java Virtual Machine information.

### **Viewing Items That Failed Processing:**

The Errors page displays information pertaining to problems processing an Outbox item. Each message that is submitted to the Outbox is assigned a message id that is used to identify the message in the Outbox.

The table provides summary information about:

- Action - The purpose the item was put into the Outbox
- Agent - The FND USER\_ID of the agent that submitted the item
- Summary - The Email Center coded description of the Outbox error
- Detail - The first few lines of the Java stack trace
- Create Date - The first time the message was submitted to the Outbox

Use the following steps to view items that failed outbox processing.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### **Steps**

1. Click the **Monitoring** tab.
2. Click the **Outbox Processor** subtab.  
The Outbox Summary page appears, displaying a summary view table.
3. From the side panel, click **Errors**.  
The Outbox Processing Errors page appears
4. In the Message ID column, click the appropriate message ID hyperlink to view detailed information about the error.  
The Error Details page appears.  
  
By clicking the message ID link for a particular item, you see all the details related to the errored Outbox item. This detailed information can be used to send to development, thereby helping them determine why a message cannot be processed.

### Viewing the Original Message:

**Note:** When you open a message from one of the historical, such as when clicking Original Message or Interaction History, you are viewing (or previewing) an already processed message. In order to work on this message, you can:

- re-reply (for inbound messages),
- re-send (for outbound messages),
- forward the message (for either inbound or outbound).

Once you take an action on the processed message, you have started a new interaction and you should be able to access the Knowledge Base again to insert or attach documents (except in the case of a re-send which, as the name implies, simply resends the message and the whole window is no longer accessible).

Use the following steps to view the original message.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

#### Steps



1. Click the **Monitoring** tab.
2. Click the **Outbox Processor** subtab.  
The Outbox Summary page appears, displaying a summary view table.
3. From the side panel, click **Errors**.  
The Outbox Processing Errors page appears
4. In the Message ID column, click the appropriate message ID hyperlink to view detailed information about the error.  
The Error Details page appears.  
By clicking the message ID link for a particular item, you see all the details related to the errored Outbox item. This detailed information can be used to send to development, thereby helping them determine why a message cannot be processed.
5. From the Error Details page, click **View Message** to view the original message.  
The Message Component opens to display the original message.

### **Reprocessing Failed Items:**

There are two options for messages in the Error queue Reprocess and Purge. Before attempting to Reprocess or Purge, you should first attempt to discover what the problem is.

In some cases, a message may have failed processing due to an environmental condition. For example:

- The SMTP or IMAP server is down
- The Oracle Customer Interaction History Database objects are invalid
- The database is down

In these cases, there is no problem with the message. Once the environmental issue has been corrected, the message should be successfully processed.

For such messages clicking **Reprocess** will remove the error rows from the database and the Outbox processor will attempt to reprocess these messages

Use the steps below to reprocess messages stuck in the outbox.

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### Steps

1. Click the **Monitoring** tab.
2. Click the **Outbox Processor** subtab.  
The Outbox Summary page appears, displaying a summary view table.
3. From the side panel, click **Errors**.  
The Outbox Processing Errors page appears
4. To reprocess an individual message from the main Outbox processing Errors page:
  1. In the Select column, select the email message you want to reprocess.
  2. Click **Reprocess**.  
Processing begins on the selected message.
5. To reprocess all messages from the main Outbox processing Errors page:
  1. Click **Reprocess All**.  
Processing begins on all messages stuck in the Outbox Processor.
6. To reprocess an individual message from the Error Details page:
  1. In the Message ID column, click the message ID hyperlink for the message you want to reprocess.  
The Error Details page appears.
  2. From the Error Details page, click **Reprocess**.  
Processing begins on the message.

### Purging Failed Items:

There are two options for messages in the Error queue Reprocess and Purge. Before attempting to Reprocess or Purge, you should first attempt to discover what the problem is.

In some cases, there may be problems processing a message due to insufficient or inaccurate data associated to the item. For examples:

- A malformed email address.
- A deleted attachment document.
- A coding problem.

If you are experiencing a code problem, you can either file a TAR or bug ( providing a View Source of the Error Detail page), or you can simple purge the message.

Purged messages are either deleted from the system or pushed back to the submitter (agent).

Deleting the message from the system deletes all information associated to the submitted item. Deleting should be used only after you have determined that the message is cannot be salvaged or lost.

A pushed back message will re-appear in the Agent's Inbox and the Note entered on the Purge page will be available for the agent's review

Use the steps below to purge a message from the Outbox processing Console

### **Login**

HTML Login URL

### **Responsibility**

Email Center Administrator

### **Prerequisites**

none

### **Steps**

1. Click the **Monitoring** tab.
2. Click the **Outbox Processor** subtab.  
The Outbox Summary page appears, displaying a summary view table.
3. From the side panel, click **Errors**.  
The Outbox Processing Errors page appears
4. To purge an individual message from the main Outbox processing Errors page:
  1. In the Select column, select the email message you want to purge.
  2. Click **Purge**.  
The Purge page appears.
  3. Optionally, in the Push Back Note field, type a note explaining situation to the original agent.
  4. Click **Apply**.
5. To purge all messages from the main Outbox processing Errors page:
  1. Click **Delete All**.

2. Optionally, in the Push Back Note field, type a note explaining situation to the original agent(s).
3. Click **Apply**.
6. To purge an individual message from the Error Details page:
  1. In the Message ID column, click the message ID hyperlink for the message you want to purge.

The Error Details page appears.
  2. From the Error Details page, click **Purge**.

The Purge page appears.
  3. Optionally, in the Push Back Note field, type a note explaining situation to the original agent.
  4. Click **Apply**.

## Concurrent Programs

The concurrent processor runs events in the database.

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

- **Rebuild Help Search Index** - This program is owned by AOL and is used for rebuilding index for MES document repository.
- **Email Center Download Processor Notifications** - This program starts Email Center DP notification workflow.
- **Process Email Center Purge Requests** - Purges email messages from the system.
- **Start Email Processing** - Start Email Processing controller which spawns separate worker processes.
  - **Email Processing Worker** - This is the child process spawned by the above controller.
- **Stop Email Processing** - Stop all email processing worker.
- **Start Email Center Migration** - This is the controller program which spawn separate migration worker process.
  - **Email Center Migration Worker** - Worker threads for migration, spawned by the controller program.

- **Stop Email Center Migration** - This program stops all migration worker processes.

Use the following steps to start the applicable concurrent programs.

### Login

HTML Login URL

### Responsibility

Email Center Administrator

### Prerequisites

None.

### Steps

1. Click **Monitoring > Concurrent Programs**.
2. Click **Submit New Request**.
3. In the Program Name field, search for the name of the concurrent process you want to run.  
  
You can use wildcards (%) to help broaden your search.
4. In the Select column, click the Select radio button, then click **Select**.
5. Click **Next**.
6. Specify the parameters for the selected concurrent program, and click **Next**.  
  
The parameters will vary depending on the concurrent program you selected.
7. If applicable, specify the desired layout, and click **Next**.
8. Review the selected concurrent program and if all of the parameters meet with your approval. If you want to change a parameter, click **Back**, make the change. Click **Submit**.
9. Click **OK** to return to the **Monitoring > Concurrent Programs** page.

## Migration

Oracle Email Center migrates data only from releases 11.5.9 and 11.5.10 of Oracle Email Center. Customers who are live on releases prior to 11.5.9 are required to upgrade to release 11.5.9 or 11.5.10 prior to migrating email data into the Local Message Store developed for release 12.x.

The migration process migrates the following types of emails along with configuration and runtime data into the Email Center schema:

- **Agent Inbox (and Draft)** - All the email messages that are acquired by agents, residing in the Agent account, and any saved draft messages.
- **In-Queue** - Email messages that are in processing state, for example: the emails have been received and stored in the External Message store (Oracle Email Server) and are being processed by the server processing engine, but have not yet been assigned to Agents.
- **Un-Processed** - Email messages that reside in the Admin or Retry folders on the Oracle Email Server.
- **Historical** - Email messages that have been processed by Email Center, for example: the emails have been resolved and stored accordingly in the External Message store (OES). This includes archived emails.

The Migration console provides a real-time status of the migration progress by displaying the following:

- Status of the migration process for each email account
- Status of the migration process for each email type
- The count in runtime queues that need to be empty prior to starting migration process
- Error details whenever there is a failure

You can use the Migration Console to view a summary of the migration process and view error details.

### **Perform Prerequisites:**

You need to perform some basic steps before attempting formal migration.

#### **1. Decide What to Migrate**

This is a very important step. Oracle Email Center migrates In-Queue/Processed and Historical emails along with configuration data from pre-release 12 setup. Historical email migration can be time consuming. Therefore it is advised that you migrate historical emails only if there is a justifiable business need for them to be available in the release 12.x environment. Administrators can choose a historical cut-off date as part of this migration process. All data from that date is moved to the release 12.x instance. Please note that Oracle Email Center does not delete any historical data from before release 12.

Consider the following factors and take the recommended action before migrating historical data.

1. Do agents need to refer to historical email going forward?

2. If the answer to question 1 is yes, then what is the oldest email to which agents want to refer?

3. Pick a cutoff date for migration of historical email.

Based on the answers to items 1 and 2, you can decide on the cutoff date for historical email migration. Although Oracle Email Center does not have any constraint on migrating older historical emails, Oracle recommends that you do not migrate historical emails if they are not needed. Following this advice results in a quicker migration process.

4. Manually delete unneeded emails the the Admin and Retry folders.

Email Center also migrates emails in the Admin and Retry folders, and these are processed as new emails in the new system because they were never processed in the pre-release 12 system. Therefore, manually delete emails from these folders if you do not want to process these emails from before release 12.

It is possible that emails in the Retry folder are so old that it makes no sense to process them now. Recent emails in the Admin and Retry folders can be left as-is and are processed as new emails in release 12.x If you do not want these emails to be processed, then delete them or move them to a separate folder.

5. Remove unneeded historical emails.

While migrating historical emails, those from the the release 11.5.10 Archived folder are migrated as well. The main reason that these emails are archived is that they are not required in normal operations. Therefore, if archived emails are not required to be processed, then use one of the following ways to avoid doing so:

- Use a historical cutoff date that is more recent than the most recent archived emails in the system.
- Purge the archived emails. This option is not available for release 11.5.9.
- Delete these emails or move them to another folder. This is the only option for release 11.5.9.

6. Remove unneeded emails in the Sent, Deleted, and Resolved folders.

Processing emails in the Sent, Deleted, and Resolved folder during migration also requires some thought. An email is in the Deleted folder only for interaction history purposes. Therefore, if you think that these or those in the Sent and Resolved folders are unneeded for release 12.x, then clean them up manually. In release 11.5 10, you can use the archiving and purging feature to do so.

## 2. Check the System to Which You Are Migrating

After a release 12.x patchset is applied to a pre release 12 environment, you are not able to view the old administration console. Therefore, before starting migration do the following:

1. Ensure that the database links from Oracle Applications to OES are working fine. This is a very important step.
2. Stop all OES processes to prohibit any inbound emails from coming into the system.
3. Confirm that no messages are in the preprocessing queue, that is, no records are in `iem_pre_mdts`.
4. Confirm that the Outbox Processor console has no pending message to process.
5. Confirm that the folders Classifications, Archived, Resolved, Sent, and Deleted exist for each account.

During the migration process, the system tries to access these folders and can hang if they do not exist. This scenario arises if folders are manually deleted or renamed, for example.

6. Apply the required installation and post installation patches.

Oracle implementation guides do not provide patch numbers for product installation. Instead, use installation and release documentation to verify and apply the required installation and post-implementation patches for the migration feature. Contact Oracle Support for access to such patches.

### 3. Use a Test Environment

It is recommended that you test the migration process in a test environment and only then attempt it in a production environment. Observe the following checklist while running it in the test instance:

1. Have a valid release 12.x test instance that has existing release 11.5.10 Oracle Email Center related data.
2. The release 11.5.10 data present in this new release 12.x test instance must be valid in all respects. For example, the database link and account must be valid.
3. If migration is tested in a clone release 12.x instance, make sure that all release 11.5.10 data should exist and is valid. Migration cannot be tested in a fresh release 12.x instance because it is driven by release 11.5.10 configuration data.

### **Migrating Emails:**

1. Submit a Concurrent Request for Email Center Migration



## Login

HTML Login URL

## Responsibility

Email Center Administrator

## Steps

1. Navigate to Monitoring > Concurrent Program.
2. Submit the request Start Email Center Migration with values for the following parameters:
  - Number of Workers: Number of concurrent threads that act as workers.
  - Historical Date: The application migrates historical data after this date. For example, if you specify 10th January 2007, then it will migrate all historical emails after 10th January 2007.
3. Submit the concurrent request.
2. Start the Email Center Download Processor in Migration Mode
  1. Log in to Oracle Applications Manager.
  2. Navigate to Application Services, and click Go.
  3. Select the service name Email Center Download Processor.
  4. Click View Details.

The Service Instances for Email Center Download Processor page appears.
  5. Select Email Center Download Processor – Migration Mode.
  6. Click Edit.

The Email Center Download Processor page appears.
  7. Click Edit Service Parameters.
  8. Ensure that MODE=MIGRATION..
  9. Click Save to save changes.

This value is then set by default.

**Caution:** Parameters are case sensitive. Do not modify other

parameters unless so specified in a document or instructed by Oracle Support or the Development team.

10. Navigate to Service Instances for Email Center Download Processor as specified in steps 3 and 4.
11. Click Start to start Download Processor in Migration Mode.

### **Viewing the Migration Summary:**

Use the steps below to view a summary of your migration status.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

#### **Steps**

1. Click the **Monitoring** tab.
2. Click the **Migration** subtab.  
The Migration Summary page appears, displaying a summary view table.
3. In the Select column, click the radio button for the account on which you want to see migration summary statistics.  
The Account Details area on the Migration Summary page refreshes to display summary information for the selected account.

### **Viewing Migration Error Details:**

Use the steps below to view migration error details.

#### **Login**

HTML Login URL

#### **Responsibility**

Email Center Administrator

#### **Prerequisites**

none

### Steps

1. Click the **Monitoring** tab.

2. Click the **Migration** subtab.

The Migration Summary page appears, displaying a summary view table.

3. In the Select column, click the radio button for the account on which you want to see migration summary statistics.

The Account Details area on the Migration Summary page refreshes to display summary information for the selected account.

4. In the Error Details column, click the icon corresponding to the email type for which you want to view error details.

The Error Details page appears displaying a summary view table of all the migration errors for the selected email type..

### Retrying Failed Migration Items:

Use the steps below to retry failed migration items.

#### Login

HTML Login URL

#### Responsibility

Email Center Administrator

#### Prerequisites

none

### Steps

1. Click the **Monitoring** tab.

2. Click the **Migration** subtab.

The Migration Summary page appears, displaying a summary view table.

3. In the Select column, click the radio button for the account on which you want to see migration summary statistics.

The Account Details area on the Migration Summary page refreshes to display summary information for the selected account.

4. In the Error Details column, click the icon corresponding to the email type for which you want to view error details.

The Error Details page appears displaying a summary view table of all the migration errors for the selected email type..

5. In the Select column, click the box for the work item you want to retry, and click **Retry**.

The selected item is retried.

---

## Diagnostics and Troubleshooting

This chapter covers the following topics:

- Diagnostics
- Troubleshooting
- Frequently Asked Questions

### Diagnostics

A new selection on the Diagnostics page of the HTML Administration Console has been added to assist in debugging configuration problems. To access this page:

#### Login

HTML Login URL

#### Responsibility

CRM HTML Administration

#### Prerequisites

none

#### Steps

1. Click the **Diagnostics** tab.  
The Diagnostics Summary page appears.
2. From the Application list, select **Email Center**, then click **Go**.
3. In the Select column, click the box for the diagnostic test you want to run, and click **Run**.

**Note:** The following categories of tests are available:

- **Configuration Setup** - This test checks if the minimum configuration setup has been completed.
- **Email Account** - Email Account creation, authentication and rule-related checks can be performed using the tests provided in this category.
- **Email Processing** - Runs a check on any email stuck in the pre-processing queue.
- **RunAll** - Runs diagnostic checks on all the categories.

## Troubleshooting

Please refer to the latest IEM release About Document and relevant HTML files:

- Patch Description
- Frequency Asked Questions (FAQs)
- Implementation Overview
- Detailed Implementation Steps

Please refer to My Oracle Support for all the latest product documentation and documentation updates for Oracle's products.

In addition to providing correct values for the fields listed above, ensure that you provide the correct Listener Port Number, Passwords, Machine name & IP address information.

### 1. Error message received when associating a route with an email account.

Indication: The Email Center administrator attempts to associate a route with an email account and receives an error message indicating that no resource groups are defined.

Solution: Ensure that at least one resource group has been defined which includes an agent with the Email Center Agent resource role.

### 1. Email messages are not reaching the Inbox folder of my email account.

Indication: Email messages have been sent to an email account. A user accesses the account inbox and does not see the email messages. This problem might be encountered while testing the installation during the Installation Checkpoint process.

Solution:

1. Check if the email has bounced because of a bad email address. Re-send the email

to the correct email address.

2. Check if your email has reached the email server. Check your system logs.

1. **Email messages are not being moved into the appropriate classification folders.**

Indication: The Email Center administrator monitors the Email Center processing and notices that email metadata tokens are remaining in the Pre Meta-Data Table (Pre MDTs).

Solution: Email Center has two MetaData tables in its schema. They are IEM\_PRE\_MDTs (Pre MDTs) and IEM\_POST\_MDTs (Post MDTs). The Pre MDTs stores information about those email messages that are still in processing phase. The Post MDTs stores fully processed email information. If your email metadata tokens are remaining in the Pre MDTs, the Concurrent program might not be running.

To see any existing Email Center concurrent processes, complete the following steps:

1. From the Forms application login page, login using the default system administrator user name and password.
2. From the list of application responsibilities, select Email Center Concurrent Program Administrator.

The Navigator-Email Center Concurrent Program Administrator page appears, displaying a list of functions.

3. From the list of functions, double-click **Run**.
4. Double-click **Requests**.
5. Click **Find** to see existing processes.

- **Documents are not being picked up as suggested responses.**

Indication: An Email Center agent user does not see suggested responses in the Suggested Response bin when replying to an email message.

Solution: Check the following:

- Ensure that intent processing is enabled for the email account.
- Ensure that after uploading documents, the "Rebuild Help Search Index" concurrent program is run.

## Frequently Asked Questions

**Where can I get more information on Email Center?**

Please refer to My Oracle Support.

### **What is the Administration console?**

Email Center Administration is a set of common pages for the setup and administering of Email Center from a single login. Administration is user friendly and chronological formatted for simple navigation and step-by-step set up. Key features and benefits include the following:

- Overall Ease of Use.
- Integration with Marketing Encyclopedia System (MES) Administration.
- Integration with One-to-One Fulfillment Administration.
- Graphical User Interface for defining classifications, processing rules, routing rules, intents, and tags.

A user accessing the Administration console must have the Email Center Administrator responsibility, MES Administrator resource role, and the JTF\_FM\_ADMIN role assigned.

### **What is the recommended Implementation approach for Email Center?**

The Email Center Implementation steps have been grouped into 4 modules: Installation, Configuration, Rules and Business Data.

## **Setting Up Site Profiles**

### **Why do I need a default customer?**

All interactions have to be associated with a valid customer. The interactions for incoming emails from parties not defined in the system will either be associated with Default Customer or the agent can search for a valid customer.

### **What happened to the default workflow shipped with Email Center?**

The out of the box processing of default workflow has been replaced by database resident programs which do the equivalent processing, that is, analyze emails, extract the contents, classify and route the emails, and get the suggested response documents. The Mail Pre-processing workflow is still provided but is called only for custom email processing - Refer to Create Email Accounts Enable Customized Processing Flow field.

### **What will happen to the existing customization done to the workflow (release 11.5.5 and before)?**

If you already customized the default workflow (that is, added some extra nodes, plugged in new customized API, and so on .), then in the Administration console Create Account page you need to enable the customized workflow option. Refer to Create Email Accounts Enable Customized Processing Flow field.

### **How are classifications used?**

The Email Center classification engine automatically classifies incoming emails based on user-defined rules; these are presented to agents as queues. When a classification is



associated with an email account, a queue bearing the classification name will be created under that account. Classification rules are constructed using key value pairs extracted from incoming emails. If none of the rules are satisfied, the email is assigned the classification Unclassified.

### **How is routing performed?**

The Email Center Routing engine automatically routes incoming emails to an agent group based on user-defined rules. These rules are constructed using key value pairs extracted from incoming emails. The routing rules are executed in the ascending order of priority starting with 1. If none of the rules are satisfied, then the email is routed to all agents belonging to that account. Emails are routed to an agent group and not to the individual agent. An agent (resource) group is only valid if it contains at least one resource, which is assigned to the email account and has one of the Email Center Agent, Email Center Supervisor, or Email Center Manager roles assigned to it.

### **What happened to the term Email Classification?**

Email Classification is now referred to as Intent. Intents enable agents to identify the broad area pertaining to the email and assist in the selection of appropriate responses.

### **How does the Email Center analyze incoming emails?**

Oracle Email Center is provided with a string of keywords or themes (for English language only) extracted from the email by the Oracle Text module of the Oracle database. Using these keywords, Oracle Email Center deciphers the intent of the email message or the broad area pertaining to the email and assists the agent in selection of appropriate responses. To enable the Email Center Intent engine, the administrator is required to create intents and keywords pertaining to the business. The keywords extracted from every incoming email are matched with the keywords stored in the Email Center schema to identify the intent of the email and fetch corresponding responses. Every intent and suggested response document is assigned a score (percentage) based on the scores of the keywords identified in the incoming email.

### **Does the Email Center intent processing support multi languages?**

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

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

## Questions on Migration

### **How do I know that the Email Center Migration process is running?**

Email Center Administrator provides a window for the migration process: Email Center Administration > Monitoring: Migration. This window shows the current status of the migration. If you have followed all the migration steps correctly, you can see migration related entries in this console. Also there are entries in the `iem_migration_Details` and `iem_migration_store_temp` files.

### **How do I know that the migration process is complete?**

Navigate to Email Center Administration > Monitoring > Migration. It shows you all accounts with their current migration status.

### **Why are we getting "unable to extend sequence iem\_ms\_base\_headers\_s1" after migration is over and normal processing resumes?**

This error occurs when the migration process invoked incorrectly. For example, this occurs if the administrator runs the migration process in a plain release 12 environment without any reference data. Doing so causes this sequence value to increase to its maximum when this migration process was run for few days without any supervision. We experienced this issue in our internal environment. As a result the sequence value increased to an astronomical figure. Therefore, when the normal process starts, this value cannot be extended. If a similar situation occurred at your site, check this sequence value. If this value is a very high, such as a 13 to 14 digit number, then reset it before resuming normal operations.

### **How I can limit the migration to run on specific accounts only?**

Migrating only part of your account data requires a customization. Move the unwanted records from the `iem_email_accounts` table to another temporary table to restrict migration to the remaining accounts. After migration, take care of the unmigrated records according to your retention policy.

### **Is it possible to migrate only configuration data from an application?**

No, you must migrate both Inbox and agent queue data along with configuration data. Historical data can be minimized by entering a recent cutoff date within the migration start-up parameter. Normally any EBS instance has 80 percent or more historical data. Therefore, by restricting the amount of historical data, migration process can be completed quickly.

### **How can I migrate configuration data without running migration?**

This requires customizing. Calling an available private API can migrate all configuration data without running migration. Please contact development for that API script. Run the script only under support supervision.

---

## Download Processor FAQs

### Download Processor

#### Uses

- NA

#### Definitions

Term	Definition
<b>Inbox</b>	This is the standard mail server folder where each new incoming email arrives.
<b>Oracle Processed</b>	After a message is downloaded, it is moved to this folder where it stays forever.
<b>Oracle Retry</b>	If for some reason a message cannot be downloaded, then it is moved to the Oracle Retry folder.

### Frequently Asked Questions

*What is the message life cycle during the download processor operation?*

Here is the sequence of events for an email message:

1. Email comes to Inbox.
2. The DP preprocessing thread puts the message uid IEM\_RT\_PP\_QUEUES with

flag='N'.

3. DP postprocessing gets a batch of messages with flag='N' for processing and stamps it as 'A'.
4. After a message is downloaded, mark it as "M" and then try to move it to the Oracle Processed folder.
5. If a move message failure occurs, then mark it as "O".
6. If a message cannot be downloaded after 5 tries, then mark it as "F" and move it to the Oracle Retry folder (if the message exists in Inbox).
7. If a message does not exist in Inbox because, for example, some other process deleted it or it was manually deleted, and the download processor tries to download it, then after 5 unsuccessful tries mark the message status as "Q".

*What are the various folders that Email Center requires, and what are their purposes?*

Refer to the definitions at the head of this section.

**3. What are the different flag values in the iem\_rt\_pp\_queue table?**

The following table shows the flag values.

Flag	Cause	Admin Action	Comments
N	When pre processing thread create an entry for a message in Inbox	None	This is a normal temp.condition.
A	Post processing thread starts working on an entry.	None	This is a normal temp.condition.
M	Message downloaded successfully. Next step is to move the message.	None	This is a normal temp. condition.
O	Error encountered while moving the message to Oracle Processed folder.	Need to manually move the message from Inbox to Oracle processed.	Message will remain in this status permanently.

Flag	Cause	Admin Action	Comments
F	Message cannot be downloaded due to error and moved to Oracle Retry folder.	Admin needs to check the error log from DP console and take appropriate action.	Message will remain in this status permanently.
Q	Messages cannot be downloaded as they no longer exist in Inbox.	Admin needs to check error from DP console as well Check if these messages are already processed or not.	Message will remain in this status permanently.

***What manual actions does administration need to take for managing the download processor?***

The actions are as follows:

- Monitor the DP admin console and DP logs from there.
- Check if messages are stuck in Inbox for a long period of time.
- Check what kind of messages are in the Retry folder.
- Check if there are records with flag "O" in the IEM\_RT\_PP\_QUEUES table. In that case they need to move these message manually to the Oracle Processed folder.

***Can the download processor purge a message after downloading automatically?***

Email Center tries to have minimum interaction with Email Server. So as part of design, after a message is moved to the Oracle Processed folder, it stays there.

***What should we should do with Oracle Retry folder messages?***

- Find the corresponding error message from the download processor admin console or query the IEM\_DP\_LOGS table. Doing a comparison based on rfc822\_message\_id and subjects and so on can do this.
- From the error message, try to see if it is related to the environment such as folder connection/mail server down/A20 append issue, and so on. These are mail server related error messages, and for these you can try to move these message again back to Inbox.
- If there are message malformed issues like message boundary and so on is missing, in these cases the message cannot be downloaded.

***Why does message processing get slowed sometimes, and have you any suggestions to improve that?***

- System is trying to process a very very large message, and as a result there may be some contention in getting resources.
- The IEM\_RT\_PP\_QUEUES table contains a large number of records with status "O". Unless these messages are moved from Inbox, the pre processing thread won't be able to get new entries into this table.
- The mail server is resetting message uid's, and this can cause an issue if IEM\_RT\_PP\_QUEUES contains a large number of records with flag "O", "F", "Q". In that case, new messages with the same message uid won't be able to create an entry in this table.

***Is there any limitation on processing large size messages, any recommendation?***

There is as such no limitation, but if business does not require processing of large sized emails, it is better to avoid them to provide a better response from the system. Large sized email can cause a contention issue with a mail server because considerable time may be required to download messages.

***We noticed that sometimes download processor threads are down. What could be the possible cause and action to resolve this issue?***

To know the reason, enable logging and provide the information to development for further research. This could also be due to heap memory exhaustion. Is sufficient memory available? It could be advisable to check it by increasing the heap size in the OC4J instance. Also check from the OAM console and look into the ICM logs that are associated with the DP process.

***How many times does the download processor try to process a message? Can it be configured?***

Download Processor tries to download a message 5 times, and it cannot be configured.

***Does the download processor encounter contentions? How to avoid that?***

- Please make sure that all threads are not looking into a single account. Splitting the processing across multiple accounts is the way to go. This is a must if the volume of email is more than 200 per hour.
- Also try to avoid processing large sized emails, or move these large sized emails to a separate account.

***What is the recommendation for clearing records from the iem\_rt\_pp\_queue table and why it is necessary?***

When the preprocessing thread looks to write into new email information, the only unique way to identify a new email is by the message uid that is return by the mail server. There are some mail servers where this message uid can get reset. So if records are there in the iem\_rt\_pp\_Queue table, in that case, a new message cannot be processed if they have the same message uid (due to mail server resetting the value). This is so because while inserting a record into the iem\_rt\_pp\_queues table, DP checks whether the same message uid for that account exists or not to maintain uniqueness and not duplicate processing of emails.

***Can the download processor automate clearing records from the iem\_rt\_pp\_queue table?***

In some cases it can be done automatically. Development is working on this.

***What are the logging mechanisms available in download processor. and what is the recommendation for capturing that information?***

Goto System Administrator -> System Profile

Set the log at user level, so need to check user level check box.

Select Username

put FND%DEBUG% in search criteria

In the profile screen, set the following value

FND: Debug Log Enabled - Y

FND: Debug Log Level - Statement

FND: Debug Log Module - IEM%

Apart from above 3, set the following profile value as well at site level.

Concurrent:GSM Enabled - Y

Save the record. Now login as that user, send out email. Once you encounter the issue, complete the process (let it take 10 mins or whatever). comeout of application. Stop logging. Then do the following:

```
select to_char(timestamp,'ddmmyy hh24:mi:ss'),module,message_text from  
fnd_log_messages where module like 'IEM%'
```

Order by timestamp

***How we can reprocess Oracle Retry folder messages?***

In some cases moving a message manually to Inbox from the Retry folder can reprocess the message.

***If a message can be reprocessed from the Oracle Retry folder, why move it there?***

Sometime intermittent environment-related issues cause the download processor to encounter an error. As a result, messages cannot be downloaded in 5 attempts and are moved to the Retry folder. After this intermittent issue is resolved, the same messages can be processed again.

***Can download processor be started and stopped through a script?***

No, and we don't recommend trying to achieve through customizing.

***We are seeing lot of error messages in the download processor log. Should we be alarmed if there are any log messages that shows error?***

What we recommend is that you review the errors and see whether they caused messages to be moved to the Retry folder or not. You can compare the data by checking message subject,rfc822\_message\_id, sender, and so on. Some of the common error you can find are as follows:

- javax.mail.MessagingException: Missing start boundary

The most likely cause for this error is malformed messages. This means that the standard JMA API is not able to parse the message. If the message is in the Retry folder, then the admin can try to manually move it to Inbox to see if in a second try

these can be processed or not. If not, try to see if these message can be opened by Outlook Express or not. If not, then Email Center cannot process them. If these message can be opened by Outlook Express, then development would like to see them. The DP parsing program may need to improvement to process these types of emails.

- java.sql.SQLException: Inserted value too large for column

This can be a bug. Please log a tar. Development would like to have a look at these.

- com.sun.mail.iap. CommandFailedException: A66 NO :

These are some of the common errors that can get logged in DP logs and are email server issues. Please verify whether these messages are getting processed by Download Processor on the 2nd retry.

***Can Download Processor download all type of emails? if not, what are the limitations?***

Download Processor can download all standard RFC822 formed email. It uses the JMA API to download email. So the limitation is with the JMA API. We have seen that there are issues with malformed emails, but these should be <.0001% of the emails.

***Does Download processor interact with Mail Server and its file system?***

Download Processor does not write to Mail Server. It calls stanadrd JMA API calls, and sometime it is possible that these JMA APIs are writing to email serverp This is independent of Oracle Email Center code.

***We have seen the download processor not downloading emails from the inbox, and the number of records in the inbox folder keeps increasing. Sometimes we have seen this is due to some error at the Cisco email center, and sometimes we just need to bounce the download processor and this resolves the issue. We have also seen once we start the download processor. a few records get added to the retry folder. Would like to know why we need to start the download manager, why was it not able to handle exception the first time around, why does it handle the exception on restart?***

If there is a mail server related issue, it can cause a generic problem at the download processor. So it cannot download emails. and as a result the email count in Inbox can increase. In such type of scenario, please check the mail server and find if there are any issues. Also, in order to understand what exactly is happening, enable logging. Due to this type of generic issues, all threads may be errored out or stuck in contention. Restarting the download processor clears these and enables it to spawn a new set of threads.

***Is there a way that we can monitor the download processor and get a status report in a email or a pager alert if the download manger is down etc?***

Try to use the Download Processor Notification program so that it can send the DP console to a user with Email Center Administrator responsibility.

***We noticed that mail files mbox - imap process files are large. Oracle processed inbox is 500 MB, and the higher it gets, the better is the chance of corrupting - is there a faster way to empty that?***



Download Processor cannot delete the emails from the Oracle Processed folder. This is something that the mail server needs to handle with a rule.

***How to stop only one manager?***

There is always one Download Processor, and it spawn number of threads.

***What is the purpose of Email Center Diagnostics, and when should they be used?***

Email Center Diagnostics provide some test cases to check the health of the system.

Whenever the download processor encounters an error, we suggest to run these tests to see if there are some connectivity issues or mail server related issues. So please run these whenever you encounter any mail downloading problem.

***We can see Oracle Processed folder count is increasing, but email is not visible in the Email Center agent console.***

That implies download processor is working fine. So there are three possible tables where email is visible IEM\_RT\_PREPROC\_MAILS -> You can identify the email based on subject by issuing the query select a.subject,b.message\_id from iem\_ms\_base\_headers a,iem\_rt\_preproc\_emails b where a.message\_id=b.message\_id.

If email is present here and the Email Center processing concurrent program is running, then that implies there are some issues in processing these emails that can be diagnosed further by enabling fnd logging to further troubleshoot.

IEM\_RT\_PROC\_EMAILS -> You can identify the email based on subject by issuing the query Select message\_id,subject from iem\_rt\_proc\_emails. If email is visible here, that means that both download processor and the Email Center processing concurrent program are working fine. It could be an access issue that a particular agent may not have access to see this email. Try to see if emails are visible from the supervisor queue or not.

IEM\_ARCH\_MSGDTLS —> You can identify the email based on subject by issuing the query Select message\_id,subject from iem\_arch\_msgdtls

If you can view emails in this table, that means both download processor and Email Center processing concurrent program are working fine. There may be some auto processing rules setup that is either deleting or resolving emails by some custom procedure or auto-create or update SR action. As a result. emails are resolved instead of appearing in the Email Center console. So you need to revisit the rules.

